Leaf Data Systems
State of Washington
Licensee User Manual v 1.0
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PART ONE: Table of Data Set Descriptions

Production 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 Types.
Admin Setup: User Profiles	User Profiles identify individual team members who will have access to Leaf Data Systems. User authorization levels include the following options: - Disabled—users who do not have access to the database - View—users that are able to see the data within the database without being able to perform any functions to change the data - Edit—users that are able to edit the data within the database, excluding the administrative functions - Admin—users that are able to edit the data within the database, including the administrative functions Usernames consist of the individual's email address, which is also used to fulfill password reset requests. 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 (!@#$%^&*<>?).
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 Types	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 intermediate/end product. Plant batches must be created in order to house groups of plants of the same strain. Harvest batches represent plants of the same strain that have been harvested. Plants from different plant batches may be combined to produce a single harvest batch as long as they are all the same strain. Intermediate/end product batches represent batches of intermediate or end products that are made up of multiple harvest batches that have been combined.

	At a Production Facility, all living plants must be associated with a plant batch. All harvested plants must be associated with a harvest batch. Intermediate/end product batches are found at Processing Facilities when harvest batches are combined, for example, small amounts of trim from multiple harvest batches can be combined into a mixed batch which is then processed.
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.
Destruction of Plants or Batches	Plants or batches can be destroyed using the destruction function. *NOTE: Destroying a plant or batch implies that it once existed and is being destroyed.*
Deleting Records	Plant or batch records can be deleted. *NOTE: Deleting a plant or batch record implies that the record was created in error, and that the plant or batch never existed.*
Harvest Process	Wet weight of a harvest represents the total weight of the harvest batch immediately after the plants are cut down. Dry 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.
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

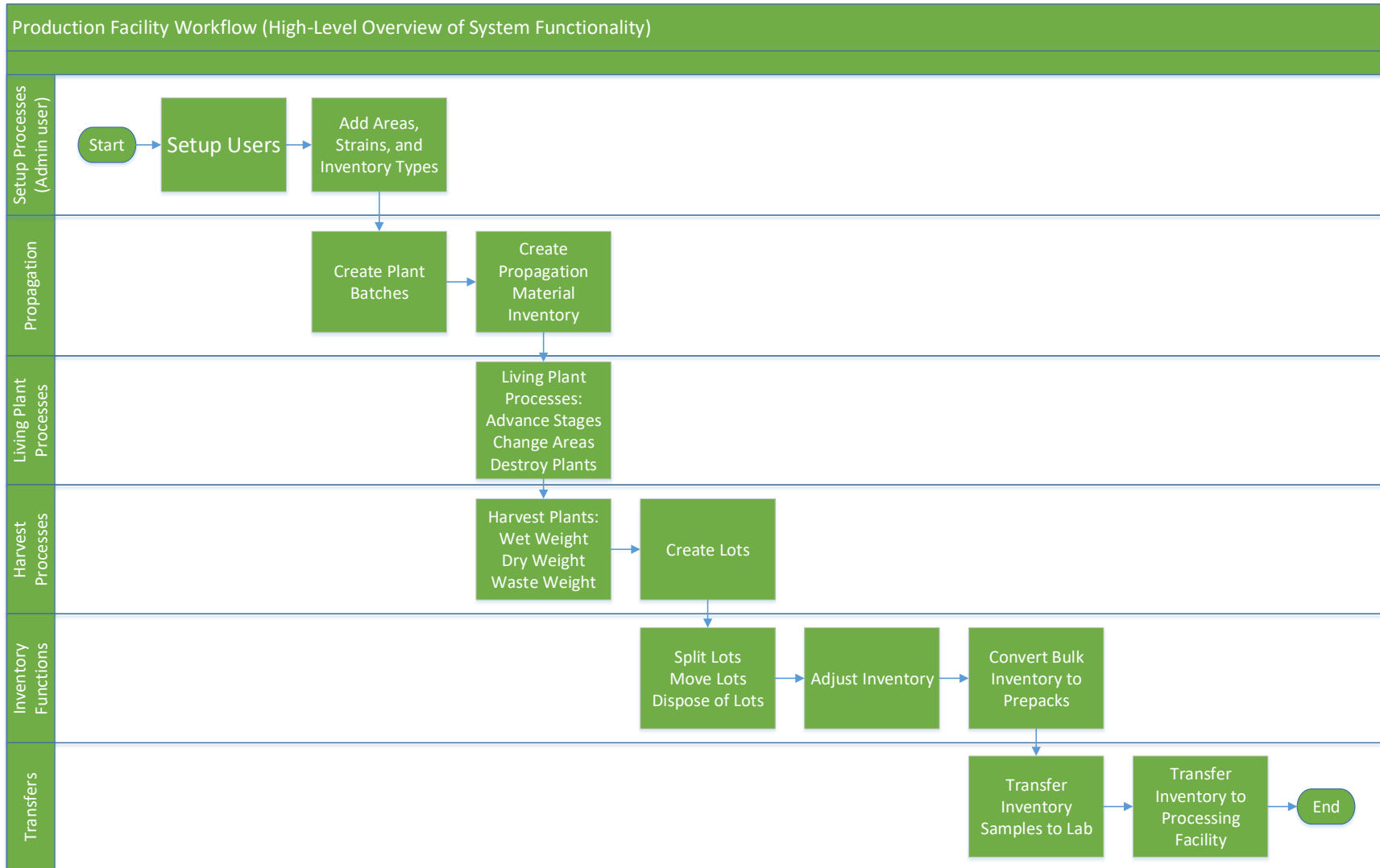| DATA SET	DESCRIPTION
Admin Setup	Prior to performing day-to-day operations at a facility, an administrative user of the facility must set up certain information, to include: User Profiles, Areas, Strain, and Inventory Types.
Admin Setup: User Profiles	User Profiles identify individual team members who will have access to Leaf Data Systems. User authorization levels include the following options: • Disabled—users who do not have access to the database • View—users that are able to see the data within the database without being able to perform any functions to change the data • Edit—users that are able to edit the data within the database, excluding the administrative functions • Admin—users that are able to edit the data within the database, including the administrative functions Usernames consist of the individual's email address, which is also used to fulfill password reset requests. 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 (!@#$%^&*<>?).
Admin Setup: Areas	Areas within a facility represent the physical locations where inventory lots may be present. Setting up areas at a facility enables physical reconciliation of 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 inventory lot records.
Admin Setup: Inventory Types	Inventory Types 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 intermediate/end product. Plant batches must be created in order to house groups of plants of the same strain. Harvest batches represent plants of the same strain that have been harvested. Plants from different plant batches may be combined to produce a single harvest batch as long as they are all the same strain. Intermediate/end product batches represent batches of intermediate or end products that are made up of multiple harvest batches that have been combined.

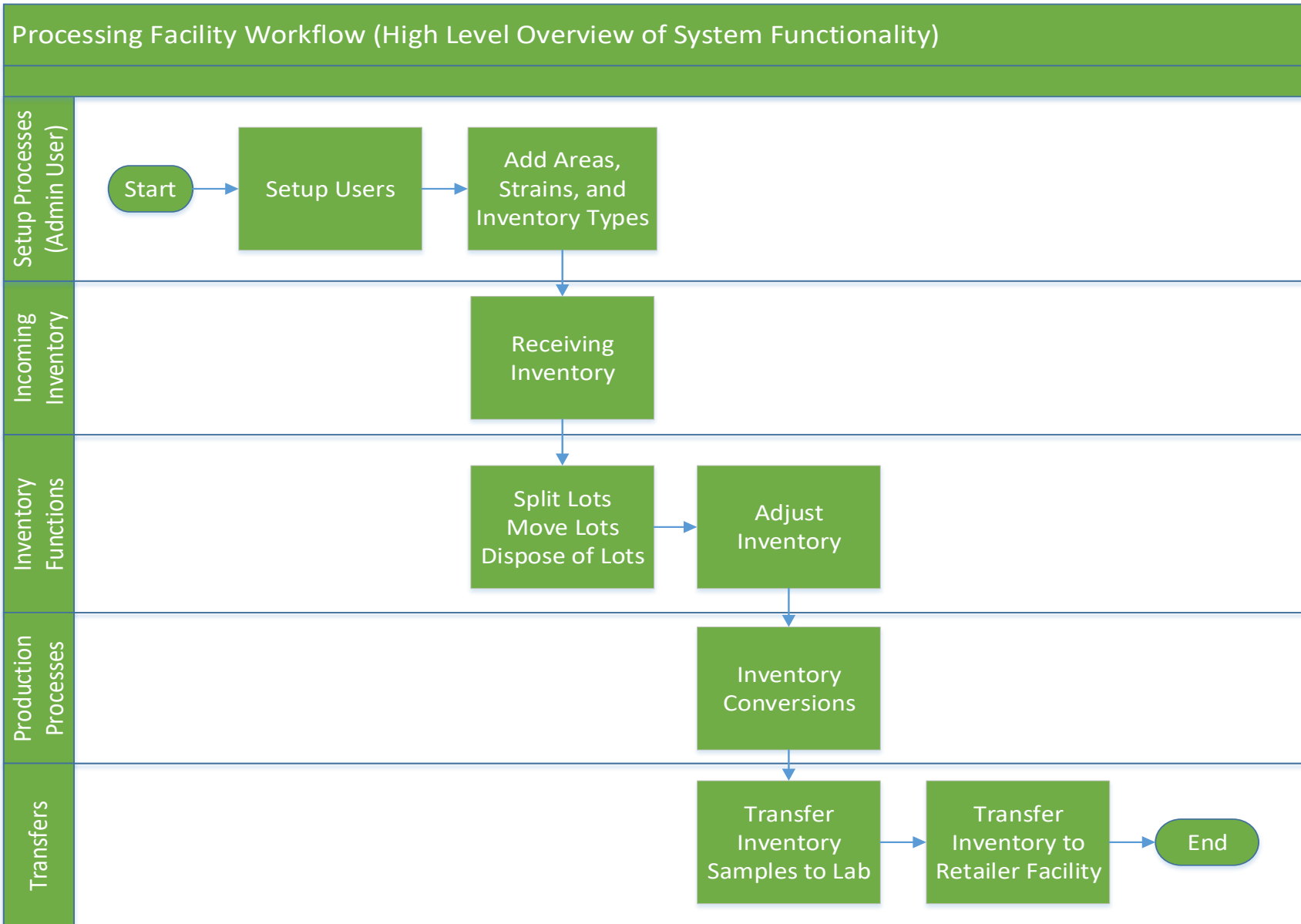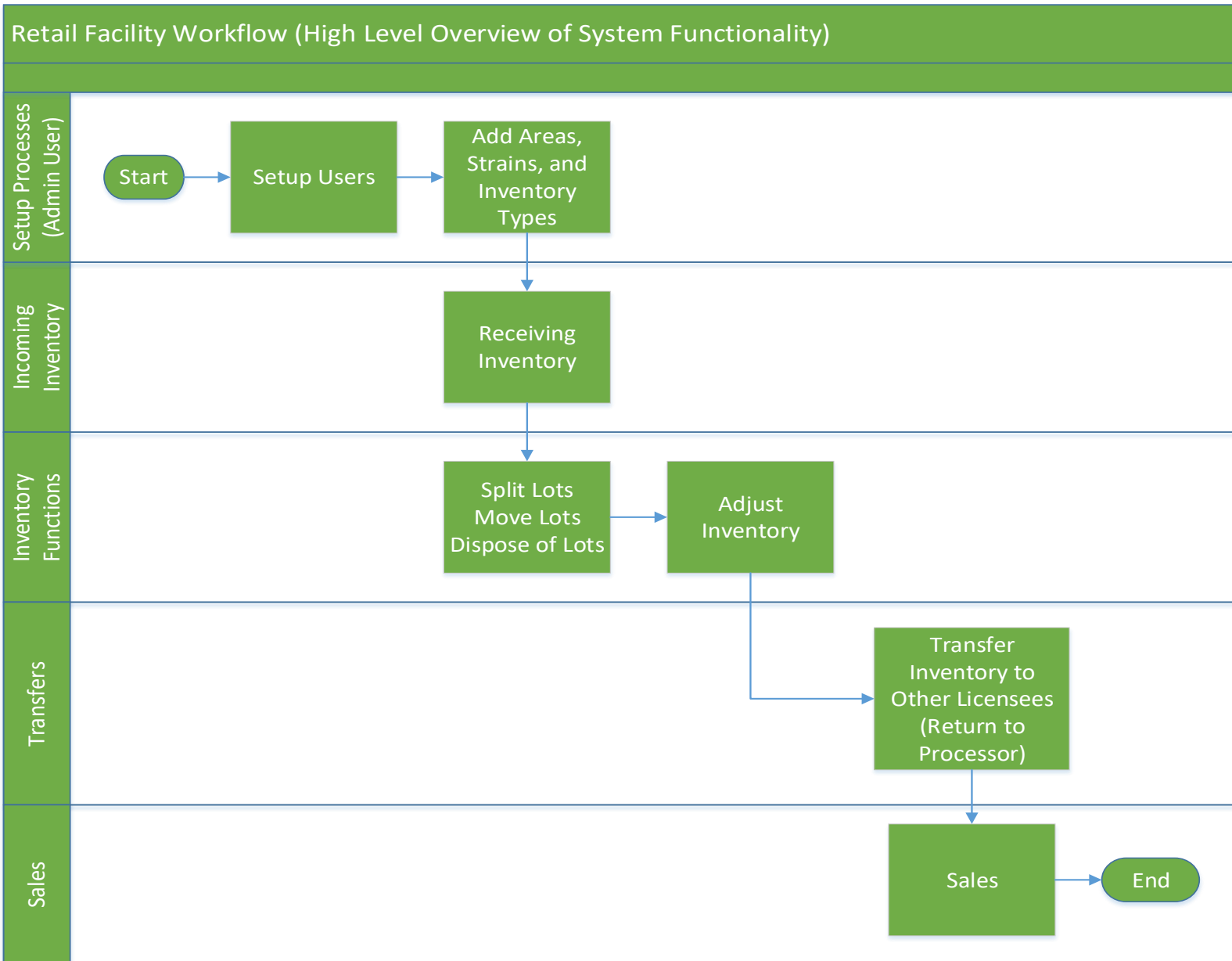|	
	At a Processing Facility, there are no plant batches present. Harvest batches are received from Production Facilities. Any product that is created by combining multiple harvest batches is considered to be an intermediate/end product batch. The only time that a batch would be created manually is when 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.
Modifying Batches	The attributes of a batch can be adjusted by modifying the batch record.
Deleting Records	Batch records can be deleted. *NOTE: Deleting a batch record implies that the record was created in error, and that the batch never existed.*
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 Types.
Admin Setup: User Profiles	User Profiles identify individual team members who will have access to Leaf Data Systems. User authorization levels include the following options: • Disabled—users who do not have access to the database • View—users that are able to see the data within the database without being able to perform any functions to change the data • Edit—users that are able to edit the data within the database, excluding the administrative functions • Admin—users that are able to edit the data within the database, including the administrative functions Usernames consist of the individual's email address, which is also used to fulfill password reset requests. 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 (!@#$%^&*<>?).
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 Types	Inventory Types 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 intermediate/end product. Plant batches must be created in order to house groups of plants of the same strain. Harvest batches represent plants of the same strain that have been harvested. Plants from different plant batches may be combined to produce a single harvest batch as long as they are all the same strain. Intermediate/end product batches represent batches of intermediate or end products that are made up of multiple harvest batches that have been combined. At a Retailer Facility, there are no plant or harvest batches present. Harvest batches are received by Processing Facilities from Production Facilities and used to create intermediate/end product batches. Any

	product that is created by combining multiple harvest batches is considered to be an intermediate/end product batch. 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.
Modifying Batches	The attributes of a batch can be adjusted by modifying the batch record.
Deleting Records	Batch records can be deleted. *NOTE: Deleting a batch record implies that the record was created in error, and that the batch never existed.*
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.
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

Production Facility Workflow (High-Level Overview of System Functionality)

Setup Processes (Admin user)

Start → Setup Users → Add Areas, Strains, and Inventory Types

Propagation

Create Plant Batches → Create Propagation Material Inventory

Living Plant Processes

Living Plant Processes:
Advance Stages
Change Areas
Destroy Plants

Harvest Processes

Harvest Plants:
Wet Weight
Dry Weight
Waste Weight → Create Lots

Inventory Functions

Split Lots
Move Lots
Dispose of Lots → Adjust Inventory → Convert Bulk Inventory to Prepacks

Transfers

Transfer Inventory Samples to Lab → Transfer Inventory to Processing Facility → End

Processing Facility Workflow (High Level Overview of System Functionality)

Retail Facility Workflow (High Level Overview of System Functionality)

Setup Processes (Admin User)

Start → Setup Users → Add Areas, Strains, and Inventory Types

Incoming Inventory

Receiving Inventory

Inventory Functions

Split Lots
Move Lots
Dispose of Lots → Adjust Inventory

Transfers

Transfer Inventory to Other Licensees (Return to Processor)

Sales

Sales → End

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PART THREE: Manual Data Entry Procedures

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 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.
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 Types

1. Navigate to 'Data Entry→Inventory Types'.
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 type, for example, the strain name followed by descriptive wording, such as 'flower' or 'other material'.
4. Select the 'category' and 'subcategory' that represent the inventory type being created.
5. Optionally, you may enter a description of the inventory type.
6. Select the unit of measure that corresponds to the inventory type being created: if the product is measured by its weight, select grams (gm) and if the product is measured by a piece count, select each (ea).
7. Once the form is complete, click the 'save' button to create the inventory type.

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 'Propagation Source' drop-down menu, select the appropriate propagation source for the plant batch being added.
6. In the 'Quantity' field, type the number of plants being created with this batch. *NOTE: Plants may also be added to batches after they have been created.*
7. 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.*
8. Click the 'save' button to create the new batch.
9. Navigate to 'Data Entry→Plants'.
10. Click the 'add' button in the upper-right corner of the screen.
11. In the 'Create Plants on Save' field, enter the number of plants being added to a batch.
12. From the 'Batch' drop-down menu, select the batch that was created in steps 2-13.
13. From the 'Area' drop-down menu, select the physical location where the plants will be placed.
14. From the 'Propagation Source' drop-down menu, select the source from which the plants were propagated.
15. If the plants will be designated as mother plants at the facility, click the 'Is Mother' checkbox.
16. If the plants represent initial inventory for the facility, click the 'Initial Inventory' checkbox.
17. 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.

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→Destructions'.
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 'Actual Date of Destruction' field to select the date that the batch of plants was destroyed.
6. From the 'Reason' drop-down menu, select the appropriate reason for destruction.
7. 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.
3. In the 'Source' drop-down menu, 'Plant' will be automatically selected.
4. From the 'Plant' drop-down menu, confirm the global ID of the plant being destroyed.
5. Click the 'Actual Date of Destruction' field to select the date that the batch of plants was destroyed.
6. From the 'Reason' drop-down menu, select the appropriate reason for destruction.
7. Click the 'save' button to dispose of the batch of plants.

Harvest Process

Within the 'Harvest Process', a 'Wet Weight' is defined as the total wet weight of the flower and other material at the time of harvest. The 'Cure Weight' is defined as the total dry weight of the flower and other material 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. From the 'Area' drop-down menu, select the area where the harvest material will be stored.
4. From the 'Harvest Batch' drop-down menu, select 'new' to create a new harvest batch, or select the harvest batch where the plants being harvested should be added.
5. Enter any waste weight generated into the 'Waste (gm)' field.
6. Enter the wet weight of the plants upon harvest into the 'Flower Wet Weight (gm)' and 'Other Material Wet Weight (gm) fields.

7. Click the 'Harvested Date Begin' field and select the date/time that the harvest was initiated for this harvest batch.
8. Upon completion of the harvest process, the 'Harvested Date End' field can be completed.
9. From the active plant records listed, click the checkbox next to each plant being harvested to select it, or click the 'check all' checkbox at the top of this section to select all of the plants listed.
10. Click the 'save' 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 other material into the 'Flower Dry Weight (gm)' and 'Other Material Dry Weight (gm)' fields.
4. Click the 'cure batch' 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. From the 'New Lots' drop-down menu, select the inventory item (strain of flower) being packaged.
4. In the 'Qty' field, enter the weight of the lot being created, in grams.
5. To create multiple lots from the same batch, click the '+Add' link next to the 'New Lots' heading, and repeat steps 3-4 until all lots are represented.
6. Click the 'finish lots' button to create the inventory lots.

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. From the 'Source' drop-down menu, confirm that 'Inventory' is selected.
4. From the 'Lot' drop-down menu, confirm the global ID of the lot being destroyed.
5. From the 'Reason' drop-down menu, select the reason that is most appropriate for the destruction record being created.
6. Click the 'Actual Date of Destruction' field to enter the date when the waste was created.
7. In the 'Qty' field, enter the weight of the product that is being disposed of.
8. Click the 'save' button to create the new destruction record.

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 if being decremented from the lot, type "-100".
5. From the 'Reason' drop-down menu, select the reason that the adjustment is being documented.
6. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
7. Click the 'save' button.

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. In the 'Manifest Type' drop-down menu, select whether the transfer is designated for pick-up, for delivery, or if it will be transported by a Licensed Transporter.
5. From the 'To Recipient' drop-down menu, select the lab that the sample is being transferred to.
6. If the transfer is part of a 'multi-stop' manifest, check the box that says 'Part of Multi-Stop'.
7. In the 'Driver' field, type the name of the driver who will be transporting the inventory (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
8. In the 'Driver #2' field, type the name of an additional driver, if applicable (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
9. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
10. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
11. In the 'License Plate', 'Vehicle Description', and 'Vehicle VIN' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
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, and the 'Sample Type' should automatically be designated as 'Lab Sample'.
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. In the 'Manifest Type' drop-down menu, select whether the transfer is designated for pick-up, for delivery, or if it will be transported by a Licensed Transporter.
4. From the 'To Recipient' drop-down menu, select the licensee that the inventory is being transferred to.
5. If the transfer is part of a 'multi-stop' manifest, check the box that says 'Part of Multi-Stop'.
6. In the 'Driver' field, type the name of the driver who will be transporting the inventory (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
7. In the 'Driver #2' field, type the name of an additional driver, if applicable (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).

8. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
9. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
10. In the 'License Plate', 'Vehicle Description', and 'Vehicle VIN' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
11. From the 'Lot' drop-down menu, select the lot to be transferred.
12. In the 'Qty' field, enter the weight of the inventory 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. For each inventory lot added to the transfer, the 'Price Total' field may be populated with the wholesale price of the item being transferred.
16. Repeat steps 11-15 until all samples being sent to the lab are represented within the form.
17. Click the 'save' button to create the transfer.

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 Types

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

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 type, for example, the strain name followed by descriptive wording, such as 'flower' or 'other material'.
4. Select the 'category' and 'subcategory' that represent the inventory type being created.
5. Optionally, you may enter a description of the inventory type.
6. Select the unit of measure that corresponds to the inventory type being created: if the product is measured by its weight, select grams (gm) and if the product is measured by a piece count, select each (ea).
7. Once the form is complete, click the 'save' button to create the inventory type.

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

9. Navigate to 'Data Entry→Lots'.

10. 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.
11. From the 'Source' drop-down menu, confirm that 'Inventory' is selected.
12. From the 'Lot' drop-down menu, confirm the global ID of the lot being destroyed.
13. From the 'Reason' drop-down menu, select the reason that is most appropriate for the destruction record being created.
14. Click the 'Actual Date of Destruction' field to enter the date when the waste was created.
15. In the 'Qty' field, enter the weight of the product that is being disposed of.
16. Click the 'save' button to create the new destruction record.

Inventory Adjustments

8. Navigate to 'Data Entry→Inventory Adjustments'.
9. Click the 'add' button in the upper-right corner of the screen to create a new adjustment.
10. From the 'Lot' drop-down menu, select the lot that is to be adjusted.
11. 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 if being decremented from the lot, type "-100".
12. From the 'Reason' drop-down menu, select the reason that the adjustment is being documented.
13. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
14. Click the 'save' button.

Inventory Conversions

1. Navigate to 'Data Entry→Conversions'.
2. From the 'Inputs' drop-down menu, select the lot(s) of inventory that represents the conversion "input". Additional inventory lots may be selected by clicking the '+add' link next to the 'Inputs' heading.
3. In the adjacent 'Qty' field, enter the amount from each original lot that is being converted.
4. *Under the 'Conversion Output' 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.*
5. *From the 'Strain' drop-down menu, select the appropriate strain if the conversion output is strain-specific. Otherwise, leave this selection blank.*
6. From the 'Area' drop-down menu, select the physical location where the new lots will be stored.
7. From the 'UOM' drop-down menu, select 'ea' to create pre-packaged simple inventory.
8. In the 'Qty' field, enter the weight/quantity of the "output" product being created.
9. In the 'Waste (gm)' field, enter the weight of any waste associated with this conversion.
10. Check the 'Product not Altered' checkbox if the conversion taking place is not changing the product, such that new qa results are required (for example, pre-packaging flower into units as end products).
11. Click the 'save' button to perform the conversion.

Transferring Samples to Testing Lab

20. Navigate to 'Data Entry→Lots'.
21. Click the checkbox within the line item of the lot being sent for testing.
22. Click the 'transfer to labs' button located beneath the filtering options at the top of the screen.
23. In the 'Manifest Type' drop-down menu, select whether the transfer is designated for pick-up, for delivery, or if it will be transported by a Licensed Transporter.
24. From the 'To Recipient' drop-down menu, select the lab that the sample is being transferred to.
25. If the transfer is part of a 'multi-stop' manifest, check the box that says 'Part of Multi-Stop'.
26. In the 'Driver' field, type the name of the driver who will be transporting the inventory (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
27. In the 'Driver #2' field, type the name of an additional driver, if applicable (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
28. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
29. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
30. In the 'License Plate', 'Vehicle Description', and 'Vehicle VIN' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
31. From the 'Lot' drop-down menu, ensure that the intended lot (originally selected from the 'Data Entry→Lots' screen) is correct.
32. In the 'Qty' field, enter the weight of the sample being transferred (in grams).
33. The 'Is Sample' checkbox should remain selected, as it is selected by default for transfers to labs, and the 'Sample Type' should automatically be designated as 'Lab Sample'.
34. To add additional samples to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
35. From the 'Lot' drop-down menu, select the additional lot from which a sample is being transferred to the lab.
36. Repeat steps 13-15 until all samples being sent to the lab are represented within the form.
37. Click the 'save' button.
38. 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

18. Navigate to 'Data Entry→Inventory Transfers'.
19. Click the 'add' button in the upper-right corner of the screen to create a new transfer.
20. In the 'Manifest Type' drop-down menu, select whether the transfer is designated for pick-up, for delivery, or if it will be transported by a Licensed Transporter.
21. From the 'To Recipient' drop-down menu, select the licensee that the inventory is being transferred to.
22. If the transfer is part of a 'multi-stop' manifest, check the box that says 'Part of Multi-Stop'.

23. In the 'Driver' field, type the name of the driver who will be transporting the inventory (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
24. In the 'Driver #2' field, type the name of an additional driver, if applicable (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
25. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
26. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
27. In the 'License Plate', 'Vehicle Description', and 'Vehicle VIN' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
28. From the 'Lot' drop-down menu, select the lot to be transferred.
29. In the 'Qty' field, enter the weight of the inventory being transferred (in grams).
30. The 'Is Sample' checkbox should remain unselected, as it is only utilized for transfers to labs.
31. To add additional lots to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
32. For each inventory lot added to the transfer, the 'Price Total' field may be populated with the wholesale price of the item being transferred.
33. Repeat steps 11-15 until all samples being sent to the lab are represented within the form.
34. 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 Types

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

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 type, for example, the strain name followed by descriptive wording, such as 'flower' or 'other material'.
4. Select the 'category' and 'subcategory' that represent the inventory type being created.
5. Optionally, you may enter a description of the inventory type.
6. Select the unit of measure that corresponds to the inventory type being created: if the product is measured by its weight, select grams (gm) and if the product is measured by a piece count, select each (ea).
7. Once the form is complete, click the 'save' button to create the inventory type.

Receiving Inventory Transfers from Other Sources

5. Navigate to 'Reports→Inventory Transfers-Receive'.
6. Within the line item of the transfer to be received, click the gear icon in the 'Receive' column.
7. Verify the weight of each lot of inventory being received, and log appropriate adjustments into the 'Qty Received' field that corresponds to each lot.
8. 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

5. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that must be split.
6. 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).
7. Click the 'split selected lot' button.
8. The designated quantity will be shifted into its own lot, and the original lot will contain the remaining weight.

Moving Lots

5. 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.
6. 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).
7. Click the 'move selected lots' button.
8. The designated lot will be shifted into the new area that has been selected.

Disposals

17. Navigate to 'Data Entry→Lots'.

18. 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.
19. From the 'Source' drop-down menu, confirm that 'Inventory' is selected.
20. From the 'Lot' drop-down menu, confirm the global ID of the lot being destroyed.
21. From the 'Reason' drop-down menu, select the reason that is most appropriate for the destruction record being created.
22. Click the 'Actual Date of Destruction' field to enter the date when the waste was created.
23. In the 'Qty' field, enter the weight of the product that is being disposed of.
24. Click the 'save' button to create the new destruction record.

Inventory Adjustments

15. Navigate to 'Data Entry→Inventory Adjustments'.
16. Click the 'add' button in the upper-right corner of the screen to create a new adjustment.
17. From the 'Lot' drop-down menu, select the lot that is to be adjusted.
18. 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 if being decremented from the lot, type "-100".
19. From the 'Reason' drop-down menu, select the reason that the adjustment is being documented.
20. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
21. Click the 'save' button.

Transferring Inventory to Other Licensees (for returning product to Processing Facilities)

35. Navigate to 'Data Entry→Inventory Transfers'.
36. Click the 'add' button in the upper-right corner of the screen to create a new transfer.
37. In the 'Manifest Type' drop-down menu, select whether the transfer is designated for pick-up, for delivery, or if it will be transported by a Licensed Transporter.
38. From the 'To Recipient' drop-down menu, select the licensee that the inventory is being transferred to.
39. If the transfer is part of a 'multi-stop' manifest, check the box that says 'Part of Multi-Stop'.
40. In the 'Driver' field, type the name of the driver who will be transporting the inventory (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
41. In the 'Driver #2' field, type the name of an additional driver, if applicable (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
42. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
43. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
44. In the 'License Plate', 'Vehicle Description', and 'Vehicle VIN' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest (only if manifest type=delivery; if manifest type=pick-up, leave this field blank).
45. From the 'Lot' drop-down menu, select the lot to be transferred.
46. In the 'Qty' field, enter the weight of the inventory being transferred (in grams).

47. The 'Is Sample' checkbox should remain unselected, as it is only utilized for transfers to labs.
48. To add additional lots to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
49. For each inventory lot added to the transfer, the 'Price Total' field may be populated with the wholesale price of the item being transferred.
50. Repeat steps 11-15 until all samples being sent to the lab are represented within the form.
51. 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 'Status' drop-down menu, select 'sale' or 'return', as appropriate for the transaction being entered.
4. From the 'Type' drop-down menu, select 'retail – medical' or 'retail - recreational'
5. From the 'Lot' drop-down menu, select the lot that the product sold came from.
6. In the 'Qty' field, enter the amount of the selected lot that was sold.
7. In the 'Discount' field, enter any discount (in dollars) applied to the sale.
8. To add additional items, click the '+Add' link adjacent to the 'Lot' drop-down menu and repeat steps 6-8.
9. Click the 'save' button to create the sale records.

PART FOUR: Reporting Matrices

Production Facility Reports

Relating to Data Captured Throughout Each Process

PROCESS	CORRESPONDING REPORT(S) AND DATA RETRIEVAL
Admin Setup	Users→View Reports→Authorized Users Data Entry→Areas Data Entry→Strains Data Entry→Inventory Types
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→ Destructions Reports→Inventory Lots Report Reports→ Destructions History→Inventory Area Changes History
Inventory Adjustments	Data Entry→Inventory Adjustments Reports→Inventory Lots Report

	History→Inventory Adjustments History
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

PROCESS	CORRESPONDING REPORT(S) AND DATA RETRIEVAL
Admin Setup	Users→View Reports→Authorized Users Data Entry→Areas Data Entry→Strains Data Entry→Inventory Types
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→ Destructions Reports→Inventory Lots Report Reports→ Destructions History→Inventory Area Changes History
Inventory Adjustments	Data Entry→Inventory Adjustments Reports→Inventory Lots Report History→Inventory Adjustments History
Inventory Conversions	Reports→Conversions 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

PROCESS	CORRESPONDING REPORT(S) AND DATA RETRIEVAL
Admin Setup	Users→View Reports→Authorized Users Data Entry→Areas Data Entry→Strains Data Entry→Inventory Types
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→ Destructions Reports→Inventory Lots Report Reports→Destructions History→Inventory Area Changes History
Inventory Adjustments	Data Entry→Inventory Adjustments Reports→Inventory Lots Report History→Inventory Adjustments History
Transferring Inventory to Other Licensees	Data Entry→Inventory Transfers Reports→Inventory Transfers/Manifests Reports→Transfer Discrepancies
Sales	Data Entry→Sales Reports→Sales Summary Reports→Sales Report Reports→Sales Adjustments