



LEAF
D A T A S Y S T E M S

POWERED BY MJ FREEWAY

Leaf Data Systems
State of Washington
Testing Lab User Manual v1.37.5

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Change Summary

PART	SECTION	SUBSECTION	CHANGE DETAIL	FIX VERSION	JIRA TICKET
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Administrative Setup	Added "Create User Profiles" section	1.35.6	N/A
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Administrative Setup	Updated "Viewing and Modifying Users" section	1.35.6	N/A
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Administrative Setup	Removed instruction to complete "description" field upon creation of inventory type (deprecated value)	1.35.6	LWNF-187
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Destructions	Updated Section	1.35.6	N/A
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Inventory Transfers	Updated Section to include all procedures related to inventory transfers	1.35.6	N/A
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Inventory Transfers	Clarification regarding file type allowable for upload of manifest to inventory transfer record (pdf)	1.35.6	LWNF-191
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Lab Results	Section created: Adding Lab Results to Inventory Samples	1.35.6	N/A
PART THREE: Manual Data Entry Procedures	Procedures for Manual Data Entry at Testing Lab Facilities	Lab Results	Section created for new workflow: Outsourcing Lab Tests	1.37.5	

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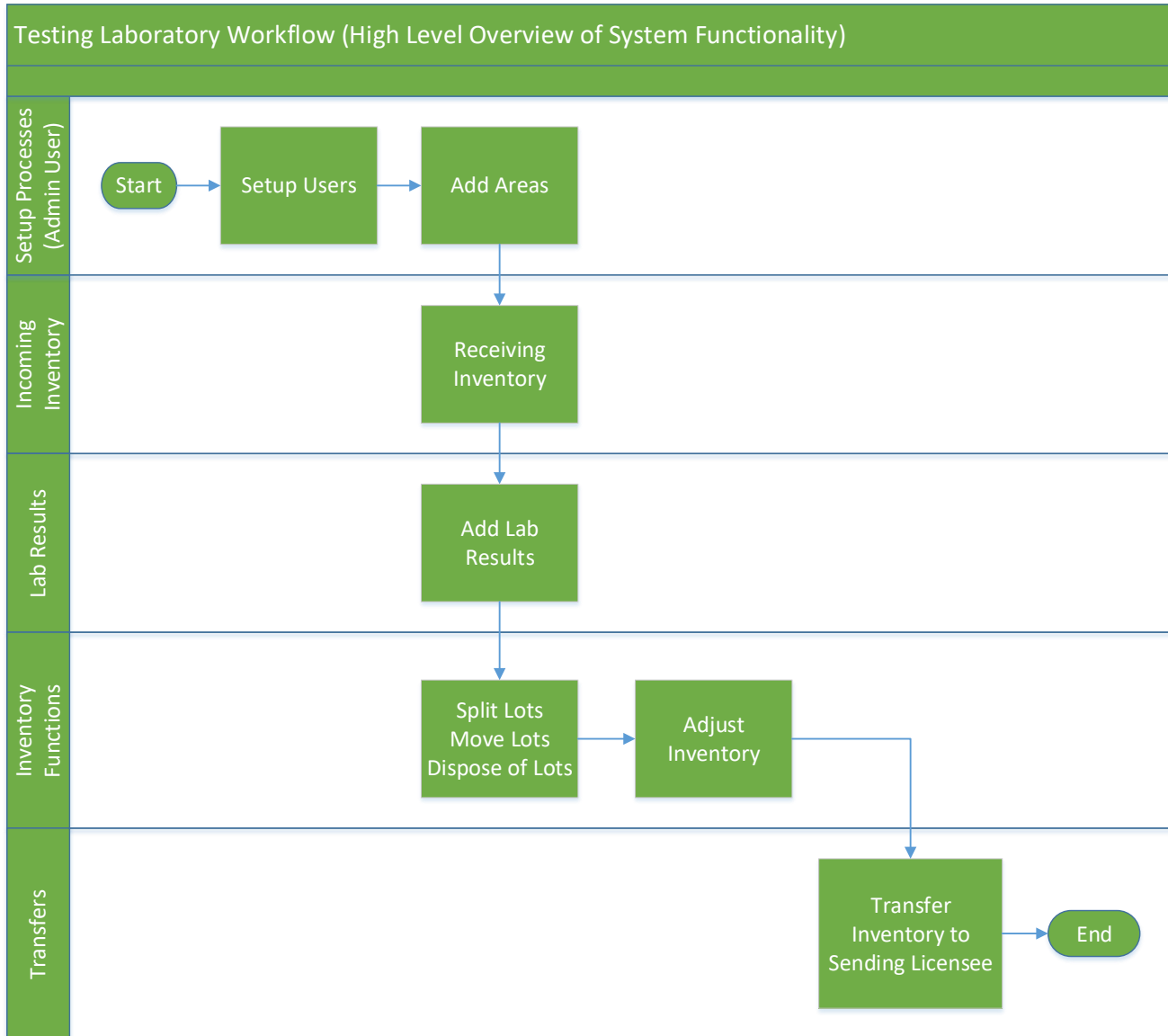
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PART ONE: Table of Data Set Descriptions

Testing Laboratory 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 User Profiles and Areas at the facility.
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"> • 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 <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 (!@#\$%^&*<>?).</p>
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.
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.
Lab Results	For each inventory lot, lab result records are created. Licensees must have passing lab results in order to transfer the inventory associated with the sample they sent to another facility.
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 Diagram



PART THREE: Manual Data Entry Procedures

Data Entry—User Interface: Procedures for Manual Data Entry at Testing Laboratories

Administrative Setup

Create User Profiles

To create a new user profile, navigate to 'Users→Add'.

The screenshot shows the 'Users Add' form in the LEAF Washington system. The form is titled 'Users Add' and includes a 'MJF ADMIN' checkbox. Below it is a 'USE MFA' checkbox. The form has several input fields: 'FIRST NAME', 'LAST NAME', 'EMAIL', 'LOCALE' (a dropdown menu currently showing 'English'), and 'EXTERNAL ID'. At the bottom, there is a table with three columns: 'LICENSEE ID', 'AUTH LEVEL', and 'CARD REG. NUMBER'. The 'LICENSEE ID' column has a dropdown menu with a plus sign and an 'x' icon. The 'AUTH LEVEL' column has a dropdown menu currently showing 'disabled'. The 'CARD REG. NUMBER' column has an empty input field. A 'save' button is located at the bottom left of the form.

1. **Use MFA:** *Do not check this box because SAW is being used to authenticate into Leaf Data Systems.* This feature has been deprecated and will be removed in a later release.
2. **First Name:** Type the first name of the user.
3. **Last Name:** Type the last name of the user.
4. **Email:** Enter the email address of the user.
5. **Locale:** Select the primary language of the user.
6. **External ID:** (optional field) Provides the ability to enter a secondary reference name/number for this record.
7. **Licensee ID:** From the drop-down menu, select the licensee(s) that the user should have access to.

8. **Delete:** Click the 'X' to delete a licensee row that has been added.
9. **Add:** Click the '+ADD' link to add more rows of licensees.
10. **Auth Level:** For each licensee that the user is assigned to, select an 'Authorization Level' from the drop-down menu.
 - a. 'View' allows a user to see information present in Leaf Data without the ability to perform data functions.
 - b. '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. '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.
 - d. 'Disabled' maintains a users profile in Leaf Data Systems while prohibiting the user from accessing the database.
11. **Card Reg. Number:** (optional field) Provides the ability to enter further identification of a user (for example, an employee number).
12. **Save:** Click the 'save' button to create the new user.

Viewing and Modifying Users

To view users that have been created within Leaf Data Systems, navigate to 'Users→View'. Use the filters and column headers to sort the data to find a specific record. To modify the record, click the 'pen' icon in the 'Modify' column of the line item you wish to modify. Update the information that has changed, and click the 'Save' button to update the record.

Users Export

LICENSEE ID LICENSEE NAME GLOBAL ID CARD REG. NUMBER USER NAME EMAIL

GLOBAL ID	EXTERNAL ID	LICENSEE ID	LICENSEE NAME	CARD REG. NUMBER	MODIFY	DELETE	PASSWORD RESET	RESET MFA	NAME	EMAIL	AUTH LEVEL
WASTATE1.US4	5287	STATE1	State						Karen Kaussner	karen@mjfreeway.com	admin
		G029843	PM Grow								admin
		R123123	QA Retailer								admin
		G12341	QA Grow								admin
		LL-123123	QA LAB								admin
		M3452345	QA Processor							admin	
		E928344	PM Coop								admin
WASTATE1.US5		STATE1	State						Valerie Burns	valerie@mjfreeway.com	admin
		G12341	QA Grow								admin
		LL-123123	QA LAB								admin
		M3452345	QA Processor								admin
		G12345	QA KS Producer								admin
		L050505	Training Lab								admin
		M020202	Training Processor								admin
R030303	Training Retailer						admin				
		G010101	Training Producer							admin	
		STATE1	State								admin
		G082365	DCGrower								admin
		R288123	DCDispensary								admin
		L025841	DCLab								admin

« 1 2 »

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.

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.

Destructions

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.
9. Once the record has been created, a resultant inventory lot representing the waste material will be created which can be found under 'Data Entry→Lots'.
10. Once the quarantine period is over, to document the physical disposal of the waste inventory, navigate to 'Data Entry→Destructions', find the line item of the destruction record, and click the 'Dispose' icon in the 'Dispose' column.

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. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
7. Click the 'save' button.

Inventory Transfers

Inventory Transfers are records that document the movement of inventory from one licensed facility (or testing laboratory) to another.

Three Different Manifest Types

When creating an inventory transfer, it is important to first understand the three types that are available.

A **Delivery** manifest is a standard transfer where the sender will be responsible for completing all of the transfer information, to include:

- a. The Recipient
- b. The Driver Name(s)
- c. Estimated Departure and Arrival Times
- d. Vehicle Information (License Plate, Vehicle Description, and Vehicle VIN)
- e. Inventory to be Transferred
- f. Price Total per line item

The general workflow of a **Delivery** manifest is that the sender is performing the physical transport of the inventory to the receiver. In this workflow, *only* the sending facility can mark the transfer as “in transit”.

A **Pickup** manifest allows for the receiver to fill out the driver, trip, and vehicle information (b, c, and d in the list above). This is designed to facilitate a workflow in which the receiver is performing the physical transport of the inventory.

A **Licensed Transporter** manifest allows for the sending facility to select a licensed transporter business to perform the physical transport of the inventory. Upon selection of this manifest type, the driver and vehicle information are not necessary, and those fields are removed from the inventory transfer page.

Now that you understand the different types of inventory transfers/manifests available, let’s take a look at inventory transfer creation.

NOTE: “Multi-Stop” functionality is currently not available in Leaf Data Systems. This is being developed for a future release. PLEASE DO NOT SELECT the “Part of Multi-Stop” checkbox visible upon creating an inventory transfer. As well, the “Inventory Transfers/Deliveries” data entry listing and report will not be useable until this functionality has been completed.

How to Create an Inventory Transfer

First, navigate to 'Data Entry→Inventory Transfers':

The screenshot displays the LEAF Washington Data Systems web application. The top navigation bar includes the LEAF logo, the text 'Washington', and a series of menu items: 'Data Entry', 'Reports', 'History', 'API', 'Users', and a search bar labeled 'global id' with a 'GO' button. The 'Data Entry' menu is open, showing a list of options: Areas, Batches, Conversions, Destructions, Inventory Types, Inventory Adjustments, **Inventory Transfers** (highlighted with a yellow box), Inventory Transfer Deliveries, Lots, Strains, WSLCB Payment Gateway, and Import Manager. The main content area on the left shows a 'Location changed' notification, followed by sections for 'Reports' (Inventory) and 'Plants'. The 'Inventory' section lists: Batches, Destructions, Initial Inventories, Inventory Lots Report, and Lab Results. The 'Plants' section lists: Batches and Destructions. The 'Miscellaneous' section lists: Authorized Users and Data Uploads. The bottom of the page shows the URL: https://traceability-training.lcb.wa.gov/inventory_transfers.

The page displayed will show a listing of all inventory transfers that have been created at the facility. To create a new inventory transfer, click the 'Add' button in the upper-right corner, then click 'Inventory Transfers'.

Inventory Transfers

Export CSV Add
Inventory Transfers

LICENSEE ID TO LICENSEE ID BATCH ID GLOBAL ID

EXTERNAL ID DEPARTED DATE HAS SAMPLE ITEMS ☐ STATUS

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	MODIFY	VOICE
WAG010101.IT1E		G010101	M020202	Leaf Training		transfer		
WAG010101.IT20		G010101	M020202	Leaf Training		transfer		
WAG010101.IT2K		G010101	M020202	Leaf Training		transfer		

The first section of the inventory transfer allows for selection of the manifest type (discussed in the previous section), and the ability to choose the intended recipient of the transfer.

LEAF DATA SYSTEMS Washington

Data Entry ▾ Reports ▾ History ▾ API ▾ Users ▾ global id GO

TRAINING Leaf @ Training Processor (production) ▾ ?

Inventory Transfers Add

STATUS
open

EXTERNAL ID

MANIFEST TYPE
Delivery ▾

☐ PART OF MULTI-STOP

TO RECIPIENT
Training Retailer (dispensary) - R030303 ▾

Once you complete these two selections, scroll down to the next section.

For a manifest type of “delivery” the next section will look like this:

DRIVER*		DRIVER #2
<input type="text"/>		<input type="text"/>
EST DEPARTURE*	EST ARRIVAL*	
<input type="text"/>	<input type="text"/>	
LICENSE PLATE*	VEHICLE DESCRIPTION	
<input type="text"/>	<input type="text"/>	
VEHICLE VIN*	MANIFEST	
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen	

For a manifest type of “pickup” the same section will look like this:

MANIFEST
<input type="button" value="Choose File"/> No file chosen

NOTE: The “Manifest” field that allows for upload of an external manifest (pdf) is not necessary if you are using the Leaf Data Systems user interface directly. Leaf will generate a manifest for you upon creation of the inventory transfer.

For a manifest type of “licensed transporter” the same section will look like this:

WHO WILL BE TRANSPORTING ITEM(S)? TRANSPORTING LICENSEE	
<input type="text"/>	
EST DEPARTURE*	EST ARRIVAL*
<input type="text"/>	<input type="text"/>
MANIFEST	
<input type="button" value="Choose File"/> No file chosen	

Complete all of the fields available based on the manifest type selected in the previous step, then scroll down.

Finally, you will need to select the inventory being transferred. There are a couple of other important designations related to this inventory.

DELETE	LOT	+ADD	QTY	UOM	FOR EXTRACTION	IS SAMPLE	SAMPLE TYPE	PRODUCT SAMPLE TYPE	RETEST?	PRICE TOTAL
<input type="checkbox"/>	<input type="text"/>	+ADD	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<div>save</div>										

Start typing the global ID or name of the inventory lot to be transferred. To add more lots, click the "+ADD" link above the field.

Select the quantity of the lot to be transferred.

The unit of measure is determined by the "inventory type" of the inventory lot.

If inventory being transferred from a Producer to a Processor is designated as being for extraction purposes, check this box

IS SAMPLE	SAMPLE TYPE
<input checked="" type="checkbox"/>	<input type="text"/> <ul style="list-style-type: none"> Non-mandatory Sample Product Sample Lab Sample

Values entered into this field for each line item will generate a wholesale transaction record upon creation of the inventory transfer. This total represents the total price of the line item (not the unit price).

IS SAMPLE	SAMPLE TYPE	PRODUCT SAMPLE TYPE
<input checked="" type="checkbox"/>	Product Sample	<input type="text"/> <ul style="list-style-type: none"> Budtender (educational) Sample Vendor Sample

For Samples, click the "is sample" checkbox to allow for selection of "Sample Type". "Sample Types" include:

Non-Mandatory Sample-used to request non-mandatory testing from a QA lab (results will NOT appear in Leaf)

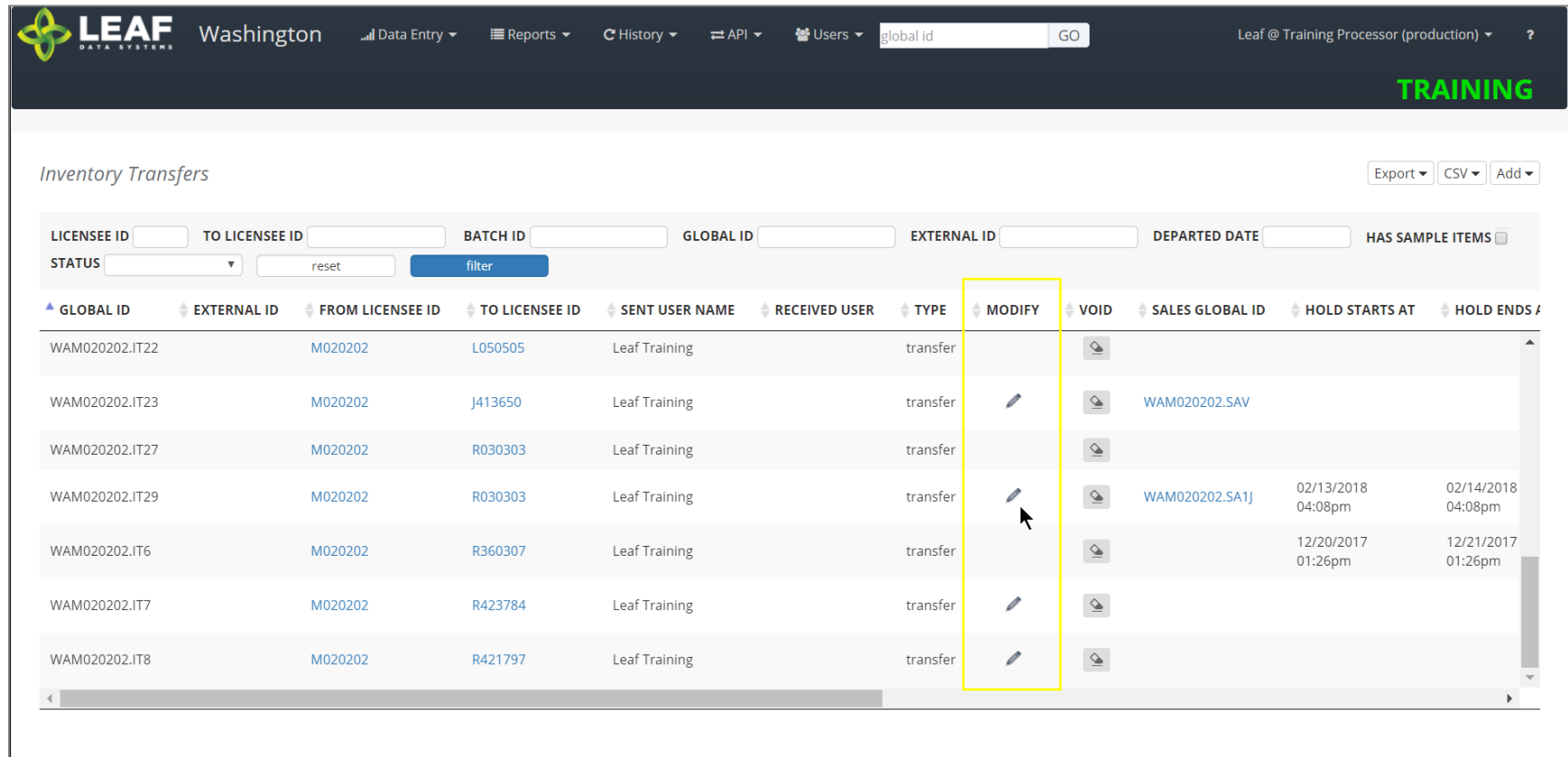
Product Sample-used to designate educational and vendor samples, causing a secondary drop-down to appear for selection of "Product Sample" type

Lab Sample—a sample being sent to a testing lab for required QA testing; selecting this sample type enables selection of the "Retest" checkbox to denote that an inventory lot is being retested

Once all of the applicable forms have been completed, click the 'Save' button to create the transfer.

Modifying an Inventory Transfer

To modify an Inventory Transfer record that has been created, navigate to 'Data Entry→Inventory Transfers'. Search for the transfer you wish to modify and click the pen icon in the "Modify" column.



The screenshot displays the 'Inventory Transfers' page in the LEAF Washington system. The page includes a navigation bar with the LEAF logo, 'Washington' text, and various menu items like 'Data Entry', 'Reports', 'History', 'API', and 'Users'. A search bar with 'global id' and a 'GO' button is present. A 'TRAINING' banner is visible on the right. Below the navigation bar, there are search filters for 'LICENSEE ID', 'TO LICENSEE ID', 'BATCH ID', 'GLOBAL ID', 'EXTERNAL ID', 'DEPARTED DATE', and 'HAS SAMPLE ITEMS'. A table of inventory transfers is shown with columns: GLOBAL ID, EXTERNAL ID, FROM LICENSEE ID, TO LICENSEE ID, SENT USER NAME, RECEIVED USER, TYPE, MODIFY, VOID, SALES GLOBAL ID, HOLD STARTS AT, and HOLD ENDS AT. A yellow box highlights the 'MODIFY' column, which contains pen icons for each record. A mouse cursor is pointing at the pen icon for the record with Global ID WAM020202.IT29.

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	MODIFY	VOID	SALES GLOBAL ID	HOLD STARTS AT	HOLD ENDS AT
WAM020202.IT22		M020202	L050505	Leaf Training		transfer					
WAM020202.IT23		M020202	J413650	Leaf Training		transfer			WAM020202.SAV		
WAM020202.IT27		M020202	R030303	Leaf Training		transfer					
WAM020202.IT29		M020202	R030303	Leaf Training		transfer			WAM020202.SA1J	02/13/2018 04:08pm	02/14/2018 04:08pm
WAM020202.IT6		M020202	R360307	Leaf Training		transfer				12/20/2017 01:26pm	12/21/2017 01:26pm
WAM020202.IT7		M020202	R423784	Leaf Training		transfer					
WAM020202.IT8		M020202	R421797	Leaf Training		transfer					

This will take to back to a page similar to the screen where you created the transfer, and you can modify any information.

Viewing and Printing the Manifest

To view and print a manifest, navigate to “Data Entry→Inventory Transfers” (as in the previous step), and search for the inventory transfer record you wish to view the manifest for. Click the gear icon in the “Manifest” column of the line item. This will produce the following:

LEAF DATA SYSTEMS Washington | Data Entry | Reports | History | API | Users | global id | GO | **TRAINING** Leaf @ Training Processor (production) ?

Transportation Manifest

EMAIL FORM TO:

Transfer Manifest Title
MARIJUANA TRANSPORTATION MANIFEST
MANIFEST ID: WAG010101-IT1E

DATE CREATED 01/24/2018 02:29pm DATE COMPLETED ORIGINATING ENTITY Training Producer - Leaf Training # 111 E 1st Ave Seattle WA 98111 LICENSE # G010101 PHONE 2065551111	TRANSFER GLOBAL ID WAG010101-IT1E DESTINATION ENTITY Training Processor 222 W 2nd Ave Seattle WA 98111 LICENSE # M020202 PHONE 2065551111
---	---

APPROXIMATE DEPARTURE:	01/23/2018 03:28pm	Product	Gorilla Glue #4 Gorilla Glue #4 Flower WAG010101.JN5N WAG010101.BA6K	Wt/Qty	2001.0000 gm
APPROXIMATE ARRIVAL:	01/24/2018 03:28pm				
VEHICLE DESCRIPTION:	Val's Car				
VEHICLE VIN, LICENSE PLATE#:	12345678986746252 123ABC				

DRIVER NAME(S): Valerie Burns.

SIGNATURE:

DATE:

PRODUCT REJECTION (if only a portion of a shipment is rejected, circle that portion above)
 I confirm that the contents of this shipment match weight records entered above and I agree to take custody of portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.

NAME OF PERSON RECEIVING OR REJECTING PRODUCT:

SIGNATURE:

DATE:

To email the manifest, enter an email address and click the 'Send' button.

To print the manifest, click the 'Print' button.

NOTE: If you are unable to see the “gear” icon due to the word “Quarantine” in its place, this means that **AT LEAST ONE** of the inventory lots associated with the transfer does not have the appropriate lab results (or lab result attestation, for initial inventory) associated. Please double-check the lab results or lab results attestation for each lot.

Marking an Inventory Transfer as “In Transit”

From the manifest view (see previous step for navigation to manifest), click the “Mark In-Transit” button in the upper-right corner of the manifest. This will change the status of the manifest from “open” to “in-transit”. Once a manifest is designated as “in-transit”, it can no longer be modified, only received. If a manifest is marked as “in-transit” in error, the only option is to “Void” the manifest (see final section of this document) and re-create it.

The screenshot shows the 'Transportation Manifest' form in the LEAF Washington system. The top navigation bar includes 'Data Entry', 'Reports', 'History', 'API', 'Users', and a search bar. The user is logged in as 'TRAINING Leaf @ Training Processor (production)'. The form title is 'Transportation Manifest'. In the top right corner, there are buttons for 'EMAIL FORM TO', 'Email', 'Send', 'Mark In-Transit' (circled in orange), and 'Print'. Below the title, the 'Transfer Manifest Title' is 'MARIJUANA TRANSPORTATION MANIFEST' with 'MANIFEST ID: WAG010101-IT1E'. The form is divided into sections for 'DATE CREATED', 'DATE COMPLETED', 'ORIGINATING ENTITY', 'DESTINATION ENTITY', 'APPROXIMATE DEPARTURE', 'APPROXIMATE ARRIVAL', 'VEHICLE DESCRIPTION', 'VEHICLE VIN, LICENSE PLATE', 'DRIVER NAME(S)', 'SIGNATURE', 'DATE', and 'PRODUCT REJECTION'. The 'Mark In-Transit' button is highlighted with an orange circle and an arrow.

For a “pickup” manifest, once the sender has created the manifest record, the receiver should navigate to “Reports→Inventory Transfers/Ready-for-Pickup”. Then, search for the manifest that is ready for pickup, and click the pen icon in the “Driver” column. This will allow the receiver to complete the driver and vehicle information pertaining to the transfer. A receiver would use the same process denoted above to mark the transfer as “in transit”.

The screenshot shows the 'Inventory Transfers/Manifests' table in the LEAF Washington system. The table has columns for 'GLOBAL ID', 'EXTERNAL ID', 'FROM LICENSE ID', 'TO LICENSE ID', 'SENT USER NAME', 'RECEIVED USER', 'TYPE', 'SALES GLOBAL ID', 'HOLD STARTS AT', 'HOLD ENDS AT', 'MANIFEST', 'EXTERNAL MANIFEST', 'DRIVER', and 'STATUS'. The 'DRIVER' column is highlighted with an orange box. The table contains several rows of data, including 'WAM020202.IT11M', 'WAM020202.IT21', 'WAM020202.IT23', and 'WAM020202.IT7'. The 'STATUS' column shows 'ready-for-pickup' and 'Quarantined'.

Receiving an Inventory Transfer

Once an inventory transfer has been marked as “in-transit”, receiver can accept the inventory into their facility by navigating to “Reports→Inventory Transfers/Receive”.

Inventory Transfers/Receive Export

DEPARTED DATE HAS SAMPLE ITEMS ☐ reset filter

GLOBAL ID	EXTERNAL ID	RECEIVE	STATUS	TYPE	TYPE	FROM LICENSEE	TO LICENSEE	FROM USER	TO USER	TRANSFERRED DATE	DEPARTED DATE	EST ARRIVAL	DETAILS
WAM020202.IT21			ready-for-pickup	inventory	transfer	Training Processor	Training Retailer	Leaf Training	Leaf Training				
WAM020202.IT27		⚙	In-transit	inventory	transfer	Training Processor	Training Retailer	Leaf Training	Leaf Training	02/08/2018 05:30pm			
WAM020202.IT29			open	inventory	transfer	Training Processor	Training Retailer	Leaf Training	Leaf Training		02/12/2018 05:06pm	02/13/2018 05:06pm	

Search for the transfer to be received, then click the gear icon in the “Receive” column. On the screen that appears (below), enter the received quantities for each line item of the transfer. Select an ‘Area’ from the drop-down menu to receive the inventory into. Finally, if the product is strain-specific, select the local strain associated with it. If it is not strain-specific, the default value in this field will denote this.

Inventory Transfers/Receive

DESCRIPTION	UOM	EXPECTED QTY	RECEIVED QTY	AREA	STRAIN
Dewberry Haze CBD Oil - 1g Cartridges WAM020202.IN6GV WAM020202.BA6U	ea	24.0000	<input type="text" value="24.0000"/>	Display Case A	Not Strain-Specific

receive

Click the ‘receive’ button once all of the information for each line item has been completed.

Voiding an Inventory Transfer

To void an Inventory Transfer record that has been created, navigate to 'Data Entry→Inventory Transfers'. Search for the transfer you wish to modify and click the eraser icon in the "Void" column. Once a manifest has been voided, it will say "VOID" in red in this column.

LEAF DATA SYSTEMS Washington | Data Entry | Reports | History | API | Users | global id | GO | TRAINING | Leaf @ Training Processor (production) | ?

Manifest voided

Inventory Transfers

Export CSV Add

LICENSEE ID TO LICENSEE ID BATCH ID GLOBAL ID EXTERNAL ID DEPARTED DATE HAS SAMPLE ITEMS

STATUS reset filter

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	MODIFY	VOID	SALES GLOBAL ID	HOLD STARTS AT	HOLD ENDS AT	MANIFEST	EXTER
WAM020202.IT21		M020202	R030303	Leaf Training		transfer			WAM020202.SAU			Quarantined	
WAM020202.IT22		M020202	L050505	Leaf Training		transfer							
WAM020202.IT23		M020202	J413650	Leaf Training		transfer			WAM020202.SAV				
WAM020202.IT27		M020202	R030303	Leaf Training		transfer		VOID					
WAM020202.IT29		M020202	R030303	Leaf Training		transfer			WAM020202.SA1J	02/13/2018 04:08pm	02/14/2018 04:08pm	Quarantined	
WAM020202.IT6		M020202	R360307	Leaf Training		transfer				12/20/2017 01:26pm	12/21/2017 01:26pm		
WAM020202.IT7		M020202	R423784	Leaf Training		transfer						Quarantined	
WAM020202.IT8		M020202	R421797	Leaf Training		transfer							

Lab Results

Adding Lab Results to Inventory Sample Records

1. Navigate to 'Data Entry→Lots'.
2. Within the line item of the lots that lab results must be added for, click the 'flask' icon in the 'Lab Results' column.
3. Required tests will be visible based on the "inventory type" of the product being tested. The list of possible test categories includes:
 - a. Foreign Matter: Stems, Seeds
 - b. Moisture: Content Percent, Water Activity Rate
 - c. Cannabinoid
 - d. Microbial
 - e. Mycotoxin
 - f. Pesticide
 - g. Residual Solvent
 - h. Heavy Metal
4. Complete all of the necessary data fields necessary based on the type of inventory being tested.
5. Click the 'Save' button to update the record.

Outsourcing Lab Results to a Second Testing Lab

Individual lab tests may be outsourced from one lab to another with the following procedure via UI and API:

- "Lab A" receives inventory from a licensee
- "Lab A" creates a lab result record, including the tests that they plan to perform in house
- "Lab A" transfers the remainder of the sample inventory to "Lab B"
- "Lab B" received the inventory sample from "Lab A"
- "Lab B" *updates* the lab result record created by "Lab A" and completed the tests they are responsible for

PART FOUR: Reporting Matrices

Testing Laboratory 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
Receiving Inventory from Other Sources	Data Entry→Inventory Transfers Reports→Inventory Transfers/Receive Reports→Inventory Lots Report Reports→Transfer Discrepancies
Creating Lab Result Records	Data Entry→Lab Results Reports→Lab Results
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