Initial Inventory Upload (Post-Contingency Process)

All licensees are expected to either manually create or upload records into Leaf Data Systems that represent their current on-hand plants (for Producers) and inventory lots.

Prior to uploading (or creating via UI) the initial inventory records, certain administrative data must be created so that they system is able to accept all of the customizable attributes that will be assigned to (plant and) inventory lot records. Following are the templates necessary for the upload of administrative data, as well as batch, plant, and inventory lot records. ***NOTE: If you retrieve the csv templates from the "API Test" page, not all of the generated columns are necessary for WA data uploads. Columns not included in the 'Field Descriptions' below are NOT APPLICABLE in Washington. Please, leave these fields blank. Required fields are denoted with an asterisk (*).***

Use the templates provided to create the csv files for data upload. The appropriate fields have been highlighted to guide you in completion of this information. Be sure to save the spreadsheet as a "csv-type" file before attempting to upload the data.

A landing page for Initial Inventory uploads has been created to aid with the traceability post-contingency processes. To upload the csv files created, navigate to 'Data Entry→Import Manager'. Click the 'add' button relative to the record you are trying to upload, and then select the csv file you have saved.

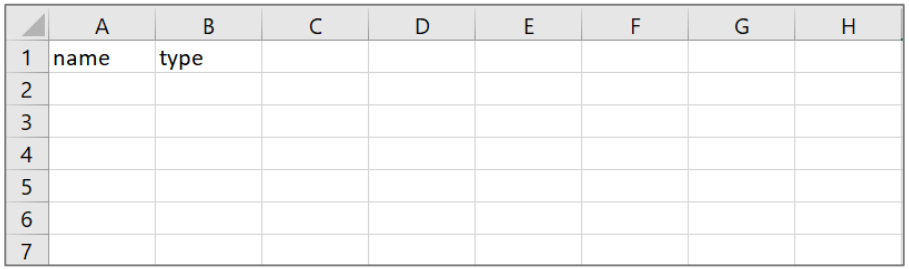
Contents

CSV Templates

Areas

Areas represent physical locations at licensed facilities where plants and inventory will be located. The types of areas are 'quarantine' or 'non-quarantine'. Areas with a 'quarantine' designation are for circumstances such as waste/destruction hold periods, QA quarantine periods, or transfer hold periods.

Areas: Template



	A	B	C	D	E	F	G	H
1	name	type						
2								
3								
4								
5								
6								
7								

Areas: Field Descriptions

NAME	TYPE	DESCRIPTION
*Column A: 'name'	free-form text	The name of the area
*Column B: 'type'	enumerated value	The type of the area (selections include 'quarantine' or 'non-quarantine'

Strains

Strains represent specific sub-species of cannabis and are an attribute that can be designated to batches of inventory. Batches of type "propagation_material", "plant", and "harvest" must have a strain assignment. For "intermediate_end_product" type batches, a "non_strain_specfic" designation is available for items that are no longer strain-specific.

Strains: Template

	A	B	C	D	E	F	G	H
1	external_id	name						
2								
3								
4								
5								
6								
7								

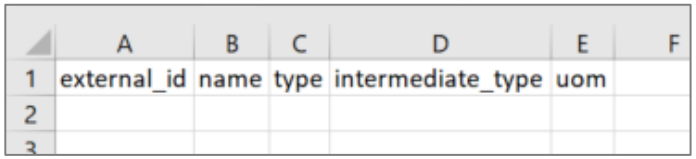
Strains: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
*Column B: 'name'	free-form text	The name of the strain

Inventory Types

Inventory Types are the different types of product that will be on hand at a facility, not actual physical inventory. Since inventory types represents a virtual bucket for what inventory lots will be in a facility, inventory types should be created before inventory lots. Also, certain "types" allow for a selection of "intermediate_type" in the UI you can see this with the dropdowns for *category* and *sub-category*.

Inventory Types: Template



	A	B	C	D	E	F
1	external_id	name	type	intermediate_type	uom	
2						
3						

Inventory Types: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
*Column B: 'name'	free-form text	The name of the inventory type
*Column C: 'type'	enumerated value	The primary category of the inventory (selections include 'Intermediate Product', 'End Product', 'Immature Plant', 'Mature Plant', 'Harvest Materials', or 'Waste')
*Column D: 'intermediate_type'	enumerated value	The sub-category of the inventory (selections available are based on the primary category entered, and include the following: for 'intermediate_product', associated values are 'marijuana_mix', 'non-solvent_based_concentrate', 'hydrocarbon_concentrate', 'co2_concentrate', 'ethanol_concentrate', 'food_grade_solvent_concentrate', or 'infused_cooking_medium'; for 'end_product', associated values are 'liquid_edible', 'solid_edible', 'concentrate_for_inhalation', 'topical', 'infused_mix', 'packaged_marijuana_mix', 'sample_jar', 'usable_marijuana', 'capsules', 'tinctures', 'transdermal_patches', or 'suppository'; for 'immature_plants', associated values are 'seeds', 'clones', or 'plant_tissue'; for 'mature_plant', associated values are 'mature_plant' or 'non_mandatory_plant_sample'; for 'harvest_materials', associated values include 'flower', 'flower_lots', 'other_material', or 'other_material_lots'; for 'waste', the only option is 'waste')
*Column E: 'uom'	enumerated value	The unit of measure associated with the inventory type (selections available are 'ea' for inventory that is tracked by its piece count, or 'gm' for inventory that is tracked by its weight in grams)

Batches

Batch types include propagation material, plant, harvest, and intermediate/end product.

'Propagation Material' batches are used to create inventory lot of seeds, clones, and plant tissue so that these plants can be tracked as inventory throughout their propagation phase. As plants shift from their propagation to vegetative phase they are moved to plants, at which point the plant records are associated with a 'plant' type batch.

'Plant' batches are a group of plants from the same strain, that are growing together within their vegetative and flowering phases. Attributes of all of the plants within a batch can be modified at the batch level, which will apply changes across all of the plant records. Additionally, plant records can be modified individually.

'Harvest' batches represent a group of harvested material that is all of the same strain. These types of batches are used to denote both 'wet' and 'dry' weight of 'flower' and 'other material' produced during the harvest. Resultant dry weight from a harvest batch is separated into 'inventory lots'.

'Intermediate/end product' batches are batches that consist of multiple harvest batches being combined, for example, combining two different strains to make a blended concentrate product.

The purpose of using batches to group together plant and inventory records is two-fold. Batches assist with creating the traceability that the system is designed to offer. As well, batches allow producers to manage plants in any phase in groups, which enables mass actions to be applied to numerous records simultaneously. Batches are not intended to constrain activities involving plant movement, as plants can be shifted from one batch to another and do not have exclusive relationships with batches they are added to.

NOTE: For initial inventory uploads of plants, DO NOT enter a quantity of plants upon batch creation. Create the batch first, THEN create the plants, so that they can be designated as "initial inventory" and have their "contingency/old traceability IDs" associated.

Batches: Template

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	external_id	planted_at	harvested_at	harvested_end_at	num_plants	status	qty_harvest	uom	is_parent_batch	is_child_batch	type	harvest_stage	packaged_completed_at	origin	plant_stage	global_strain_id	global_area_id
2																	
3																	

Batches: Field Descriptions

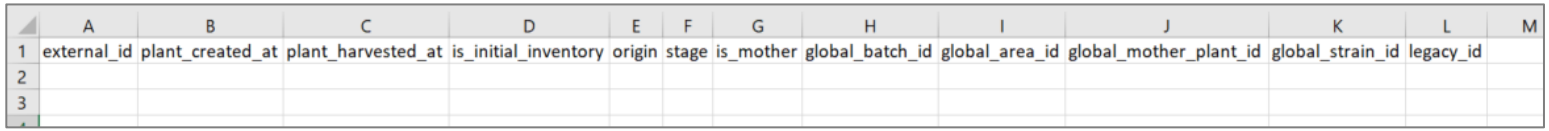
NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
Column B: 'planted_at'	datetime	If batch type (column K) equals 'propagation material', 'plant', or 'harvest' enter the propagation date of the plants in the batch
Column C: 'harvested_at'	datetime	If batch type (column K) equals 'harvest' batch, then enter the date/time the harvest began
Column D: 'harvested_end_at'	datetime	If batch type (column K) equals 'harvest' batch, then enter the date/time the harvest was completed
Column E: 'num_plants'	integer	If batch type (column K) equals 'propagation material', 'plant', or 'harvest' this field would normally be for the number of plants associated with the batch; HOWEVER, ***for initial plant inventory, if batch type = 'propagation_material' leave this field blank and add the quantity of seeds/clones/tissue culture from the 'inventory' template in order to include contingency ID number and mark as initial inventory, but if batch type = 'plant' leave this field blank and add the number of plants from the 'plants' template in order to include contingency ID number and mark as initial inventory.***
Column F: 'status'	enumerated value	Enter 'open' or 'closed'
Column G: 'qty_harvest'	decimal(10,3)	If batch type (column K) equals 'harvest', enter the 'wet weight' associated with the harvest batch
Column H: 'uom'	enumerated value	The acceptable unit of measure for 'harvest' batches in WA is 'gm'
Column I: 'is_parent_batch'	boolean value	Enter '1' if the batch is a parent batch, or '0' if it is not
Column J: 'is_child_batch'	boolean value	Enter '1' if the batch is a child batch, or '0' if it is not
*Column K: 'type'	enumerated value	The type of the batch (selections include 'propagation material', 'plant', 'harvest', or 'extraction' for an "intermediate/end product batch")
Column L: 'harvest_stage'	enumerated value	If batch type (column K) equals 'harvest', selections for harvest stage include 'wet', 'cure', and 'finish'

Column M: 'packaged_completed_at'	datetime	If batch type (column K) equals 'extraction' ('intermediate/end product'), enter the date/time the product was packaged
Column N: 'origin'	enumerated value	If batch type (column K) equals 'propagation material' or 'plant', enter the propagation source for the plants; selections include 'seeds', 'clones', 'tissue culture', 'mature plant'
Column O: 'qty_cure'	decimal(10,3)	If batch type (column K) equals 'harvest', enter the 'dry weight' associated with the harvest batch
Column P: 'plant_stage'	enumerated value	Enter the stage of the plants, depending upon the batch type: if batch type equals 'propagation material', enter 'propagation source'; if batch type equals 'plant', enter 'growing'; if batch type equals 'harvest', enter 'harvested'
Column Q: 'global_strain_id'	global ID	The global ID of the strain associated with the batch (The strain global ID can be found by navigating to 'Data Entry→Strains')
*Column R: 'global_area_id'	global ID	The global ID of the area where the batch is located (The area global ID can be found by navigating to 'Data Entry→Areas')

Plants

Plant records are created (either upon creation of a "plant" type batch or in addition to an existing "plant" type batch) to represent individual plants at a production facility that are in their vegetative or flowering phases. Once plants are no longer living at the facility, their stage denotes their disposition, such as "harvested", "destroyed", "transferred", or "seized". Since immature plants (propagation material such as seeds, clones, and tissue culture) are treated as "inventory", plant records are not created for these immature plants until they reach their vegetative phase.

Plants: Template



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	external_id	plant_created_at	plant_harvested_at	is_initial_inventory	origin	stage	is_mother	global_batch_id	global_area_id	global_mother_plant_id	global_strain_id	legacy_id	
2													
3													

Plants: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
Column B: 'plant_created_at'	datetime	The propagation date of the plant
Column C: 'plant_harvested_at'	datetime	If the plant has been harvested, then enter the date/time the harvest began
Column D: 'is_initial_inventory'	boolean value	Enter '1' if the plant is initial inventory
Column E: 'origin'	enumerated value	Enter the propagation source for the plants; selections include 'seed', 'clone', 'tissue culture', 'mature plant'
Column F: 'stage'	enumerated value	Enter the stage of the plants, depending upon the batch type: if batch type equals 'propagation material', enter 'propagation source'; if batch type equals 'plant', enter 'growing'
Column G: 'is_mother'	boolean value	Enter '1' if the plant is designated as a mother plant, enter '0' if it is not
*Column H: 'global_batch_id'	global ID	The global ID of the batch associated with the plant (The batch global ID can be found by navigating to 'Data Entry→Batches')
*Column I: 'global_area_id'	global ID	The global ID of the area where the plant is located (The area global ID can be found by navigating to 'Data Entry→Areas')

Column J: 'global_mother_plant_id'	global ID	The global ID of the mother plant to the plants being created (The mother plant global ID can be found by navigating to 'Data Entry→Plants)
*Column K: 'global_strain_id'	global ID	The global ID of the strain associated with the plant (The strain global ID can be found by navigating to 'Data Entry→Strains')
*Column L: 'legacy_id'	free-form text	The contingency/old traceability ID associated with plants, if the plant is designated as initial inventory

Inventory

Inventory lots are the physical inventory that exists at a facility.

"Immature plants" (in their propagation phases) begin as inventory at a production facility (related to "propagation_material" type batches). They do not become "plant" records (related to "plant" type batches) until they are in their vegetative phase.

"Mature plants" can be "moved to inventory" if they are to be added to an inventory transfer (if they are leaving the facility).

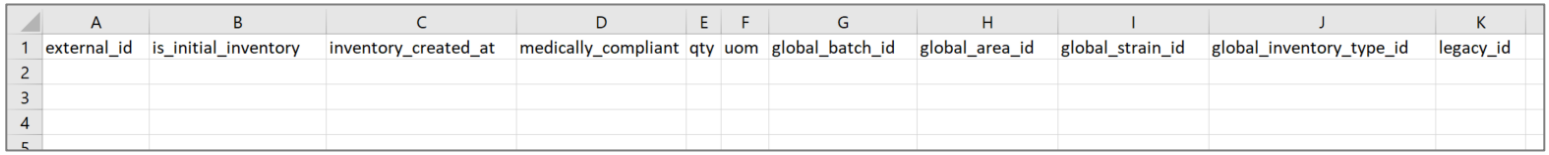
"Harvest Material" once dried and cured is packaged into inventory lots.

Inventory lots can be split into smaller lots with the relationship to the parent lot remaining intact and traceable.

Inventory conversions are performed for extraction, infusion, pre-packaging, and combining functions and convert inventory lots of one inventory type into another.

Inventory lots that represent inventory types of Intermediate Products and End Products are related to batches of type "intermediate_end_product".

Inventory: Template



	A	B	C	D	E	F	G	H	I	J	K
1	external_id	is_initial_inventory	inventory_created_at	medically_compliant	qty	uom	global_batch_id	global_area_id	global_strain_id	global_inventory_type_id	legacy_id
2											
3											
4											
5											

Inventory: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
Column B: 'is_initial_inventory'	boolean value	Enter '1' if the inventory lot is initial inventory
Column C: 'inventory_created_at'	datetime	Enter the date/time the inventory lot was created
Column D: 'medically_compliant'	boolean value	Enter '1' if the inventory has been designated as being medically compliant, and '0' if it has not

*Column E: 'qty'	decimal(10,3) integer	If the unit of measure of the inventory type associated with the lot is 'gm', then enter the decimal value of the weight on hand; if the unit of measure of the inventory type associated with the lot is 'ea', enter the integer piece count of the quantity on hand
Column F: 'uom'	enumerated value	Enter 'ea' if the inventory structure is a piece count, and 'gm' if the inventory is managed by its weight
*Column G: 'global_batch_id'	global ID	The global ID of the batch associated with the inventory (The batch global ID can be found by navigating to 'Data Entry→Batches')
*Column H: 'global_area_id'	global ID	The global ID of the area where the inventory is located (The area global ID can be found by navigating to 'Data Entry→Areas')
*Column I: 'global_strain_id'	global ID	The global ID of the strain associated with the batch (The strain global ID can be found by navigating to 'Data Entry→Strains')
*Column J: 'global_inventory_type_id'	global ID	The global ID of the inventory type associated with the inventory (The inventory global ID can be found by navigating to 'Data Entry→Inventory Types')
*Column K: 'legacy_id'	free-form text	The contingency/old traceability ID associated with the inventory lot, if the lot is designated as initial inventory