



THENTIA
CLOUD™

Empowering
Regulatory
Transformation

Instructions on How to Complete the Thentia Standard Training: Online Registry + Online Complaint/Complaints Portal + Inspector Portal



EXERCISE GUIDE

This guide is intended to lead you through the exercises for this particular training session. Please see the links below to access the required platforms.

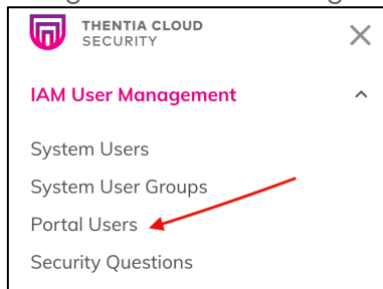
Online Portal: <https://trainingmaster.portalus.thentiacloud.net/webs/portal/#/>

Workbench: <https://trainingmaster.us.thentiacloud.com/v/register/>

EXERCISE #1 CREATE A NEW PORTAL USER AND ASSIGN THEM AS AN INSPECTOR

Within the Security Module  of the **Workbench**

1. Navigate to the hamburger menu and choose “Portal Users”



2. Click the  plus sign to add a new user



- Fill out all mandatory fields including name and email and set “Online Access Disabled” to the **No** radio button

Portal User

Username

E-mail Address

Online Access Disabled

Yes No Unset



- Navigate to the Workflow module
- Search for Inspector Entity

- Double click on reg_inspector and open the records for the Inspector Entity

reg_inspector	Facility Inspector	Facility Inspectors
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Open Records

- Click the plus to add a new Inspector record


- Scroll to “Non-Licensee”, fill in the required fields and add the portal user we just created above

Non-Licensee

Non-Licensee


- Click the power icon to activate this portal user

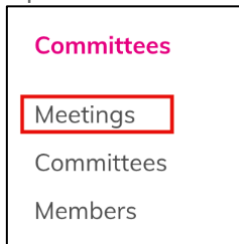
EXERCISE #2 SUBMITTING A FACILITY LICENSE APPLICATION

- 1) Go to the Complaints module in the Workbench
 - a) Navigate to the “eye” view icon and choose “all”
- 2) Find a complaint by filtering the results by most recent
- 3) Review the details of the Complaint
 - a) Click this icon  to convert the complaint to a case

TO COMPLETE ON YOUR OWN TIME

Please go to the Governance module in the Workbench and create a new meeting to review the case that was created in Exercise #2.

- 1) Open the module selector and chose “Governance” 
- 2) Open the Hamburger menu and select “Meetings” from the left navigation menu



3) Please assign the appropriate committee to the meeting and add any attendees. Also ensure the meeting has a start time and date. Required fields as indicated by the red Asterix and click "Save"

Meeting Details

Name * Training 123	Committee * Audit Committee
Meeting Summary * This is just a test	Meeting Start Time * Jun-14-2024 8:00 AM
	Meeting End Time * Jun-14-2024 9:00 AM

Quorum Achieved
 Yes No Unset

Thank you and Happy Learning!

The Thentia Training Team