



THENTIA
CLOUD™

Empowering
Regulatory
Transformation

Instructions on How to Complete the Governance, Security, and Finance Exercises

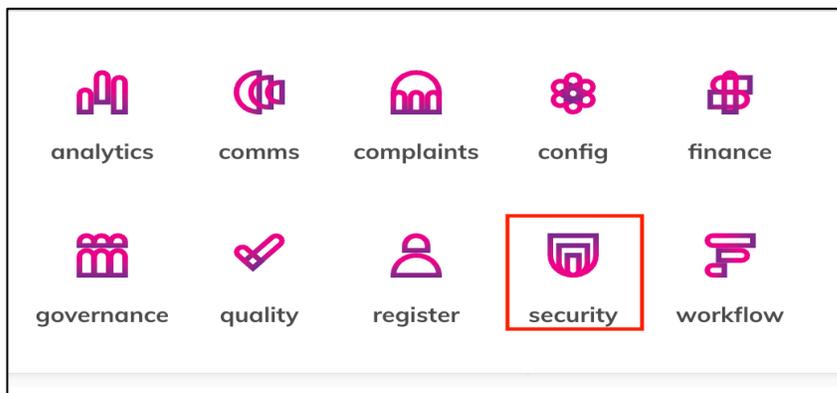


EXERCISE #1 ADDING A SYSTEM USER TO THE SYSTEM

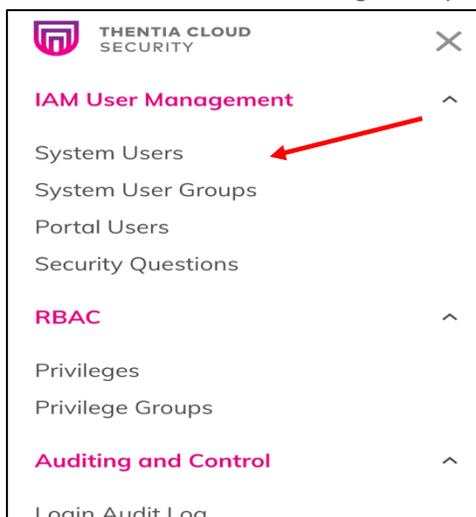
1. Within the Security Module of the Workbench
2. Click the Hamburger menu and select System User
3. Click the + create a new record.
4. Click the Save Icon

1. Access the Workbench <https://trainingmaster.us.thentiacloud.com/v/register/> and logon using your current credentials.

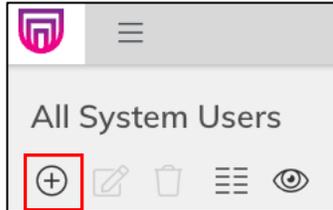
2. From the module selector , select the "Security" module.



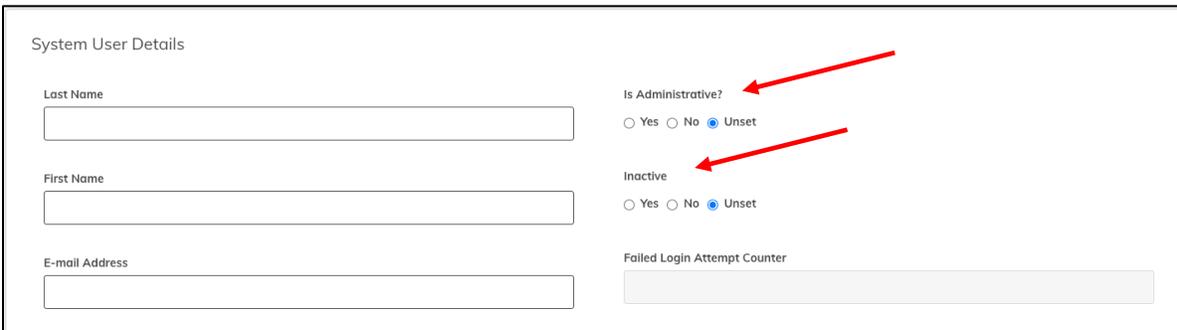
3. Open the hamburger menu  and select "System user under IAM User Management from the menu on the left navigation pane. Select System User



4. Click + to **Create a new system user.**



5. Enter information such as name email:
- Type your first name and then use **Training** as your last name.
 - Use the **same email address** used for your access to our training site.
 - Select Admin Vs Non-Admin
 - Select No for Inactive for access



System User Details

Last Name

First Name

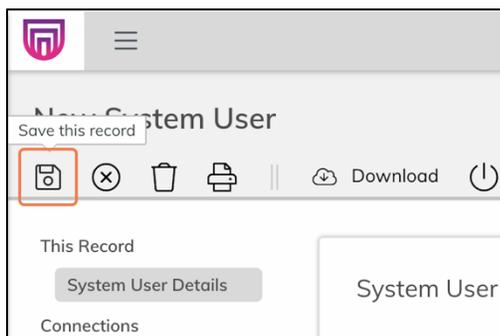
E-mail Address

Is Administrative? Yes No Unset

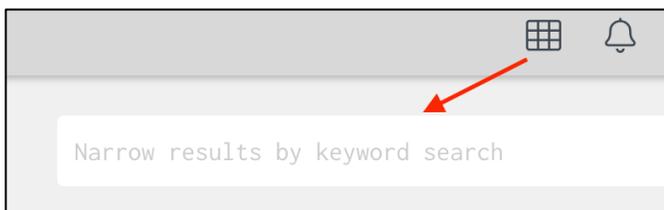
Inactive Yes No Unset

Failed Login Attempt Counter

6. Click Save



10. Type in your name in the Search box for the System user you created

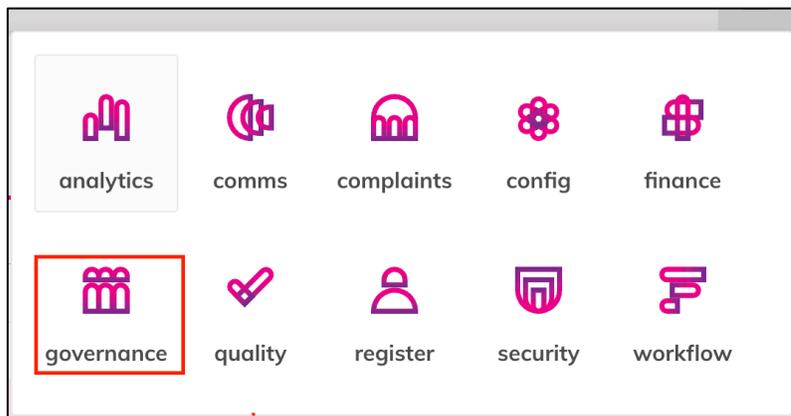


EXERCISE #2

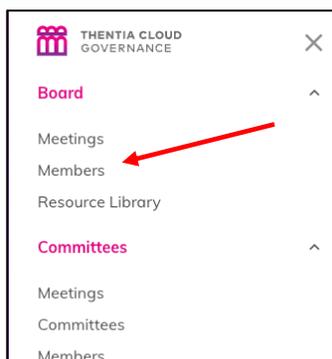
CREATING A BOARD MEMBER

1. Click the Hamburger Menu and select **Members** under **Board menu**.
 2. Click the + to add **a Current Board Member**
 3. Fill out all required fields using your first name with **Training** as the last name.
 4. Select **Today** day for Term starts date.
 5. Select **Yes** current board member.
 6. Save
-
1. Access the Workbench <https://trainingmaster.us.thentiacloud.com/v/register/> and logon using your current credentials

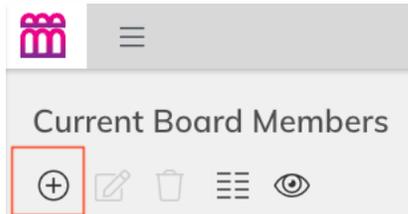
2. From the module selector , select the "Governance" module.



3. Open the hamburger menu  and select "Member user under Board from the menu on the left navigation pane. Select Member



4. Click the + to add a **Current Board Member**

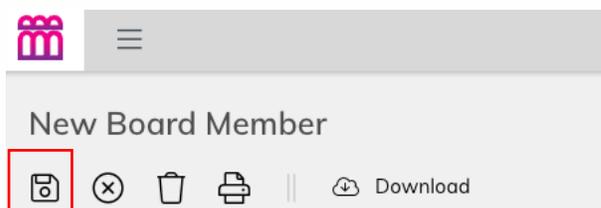


5. Fill out all required fields using your first name with **Training** as the last name
6. Term start date (**date of training**)
7. Are they a current board member = **Yes**

Member Details

Full Name *	Term Start Date *	Term End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Current Board Member? *	
<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unset	

8. To save the record click the save icon.



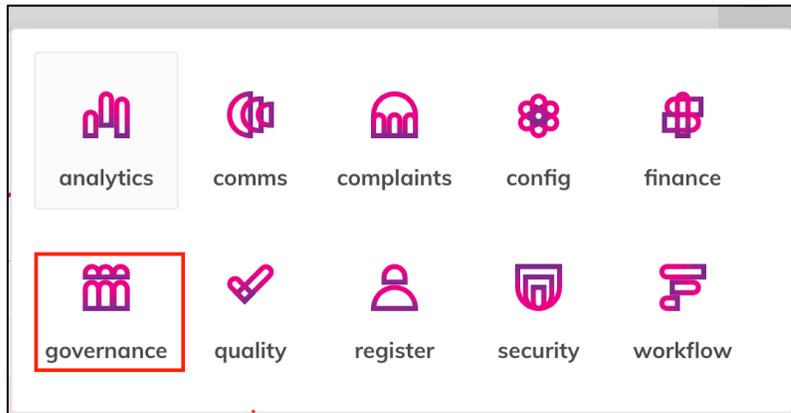
EXERCISE #3

CREATING A BOARD MEETING

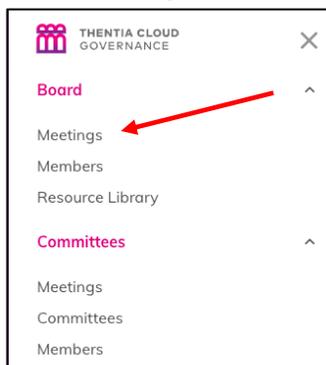
1. Click the Hamburger Menu and select **Meetings** under **Board menu**.
2. Click the + to add a **Board Meeting**
3. Type in a **Meeting Name**.
4. Enter a **Meeting Start Time** and **Meeting End Time** (required fields)
5. Save

1. Access the Workbench <https://trainingmaster.us.thentiacloud.com/v/register/> and logon using your current credentials

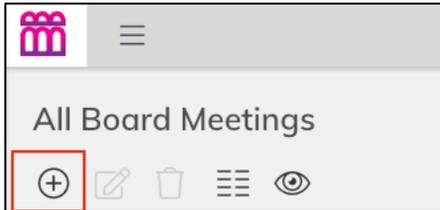
2. From the module selector , select the "Governance" module.



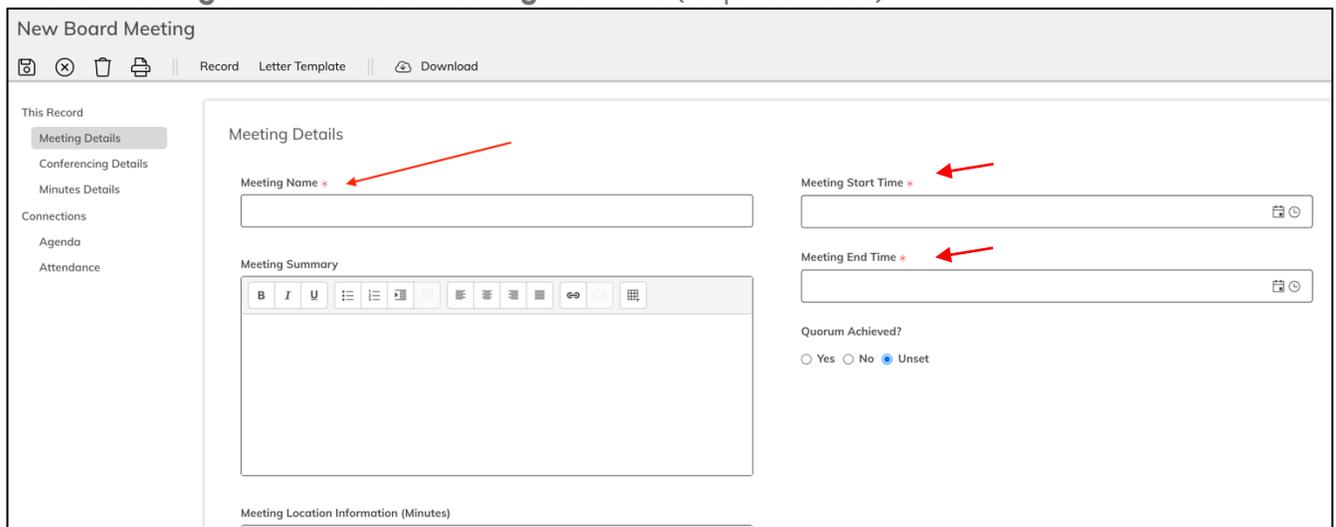
3. Open the hamburger menu  and select "Meetings user under Board from the menu on the left navigation pane. Select System User



4. Click the + to add a **Board Meeting**



5. Type in a **Meeting Name**.
6. Enter a **Meeting Start Time** and **Meeting End Time** (required fields)



7. To save the record click the save icon.





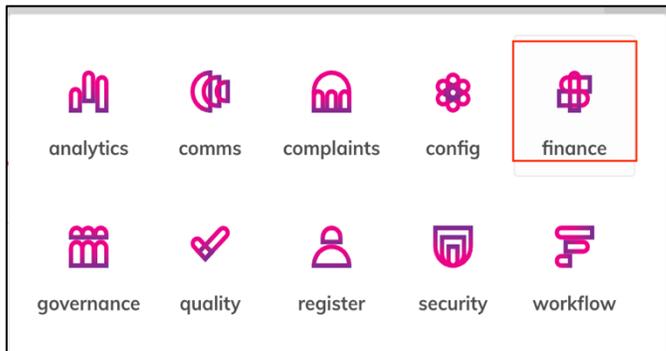
EXERCISE #4

CREATING AN INVOICE

1. Click the Hamburger Menu and select **Invoice** under **Billing**.
2. Click the + Create New Invoice
3. Type in your **Profile, Business or Education Provider name**.
4. Save and copy your invoice number (so you can search for it) Save.
5. From menu on left **Under connections** select Items
6. Click + add a **New Invoice** item.
7. When entering a name (must be a unique name per file)
8. Choose a fee product (type of fee) = **Standard Application Fee**
9. Select **No** for credit Item.
10. Save

1. Access the Workbench <https://trainingmaster.us.thentiacloud.com/v/register/> and logon using your current credentials

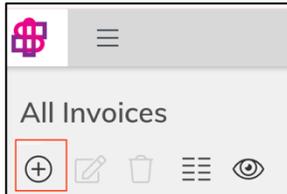
1. From the module selector , select the "Finance" module.



2. Open the hamburger menu  and select "Invoices user under Billing from the menu on the left navigation pane. Select Invoices



3. Click the + Create New Invoice



4. Type in your **Profile, Business or Education Provider name.**
5. Save and copy your invoice number (so you can search for it) Save.

Recipient

Profile ←

Business ←

Education Provider ←

Invoice Details

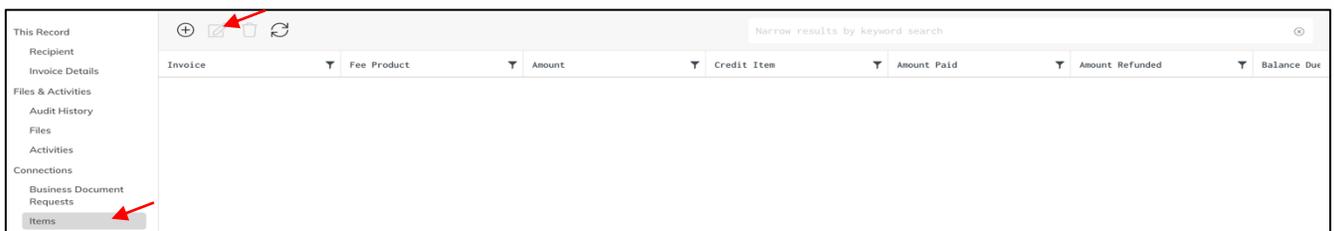
Invoice Date * ←

Invoice Number ←

Due Date

Total Due

6. From menu on left **Under connections** select Items
7. Click + add a **New Invoice** item.





8. When entering a name (must be a unique name per file)
9. Choose a fee product (type of fee) = **Standard Application Fee**
10. Select **No** for credit Item.

Invoice Item

Invoice * ⓘ <input type="text" value="000884 - Balance Owing"/>	Amount Paid ⓘ <input type="text"/>
Name * ⓘ	Amount Refunded ⓘ <input type="text"/>
Fee Product * ⓘ	Balance Due ⓘ <input type="text"/>
Amount ⓘ <input type="text"/>	Memo ⓘ <div style="border: 1px solid #ccc; padding: 5px;"><p>B <i>I</i> <u>U</u> </p></div>
Credit Item ⓘ <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unset	

11. To save the record click the save icon.

New Invoice Item

Download