



THENTIA
CLOUD™

Empowering
Regulatory
Transformation

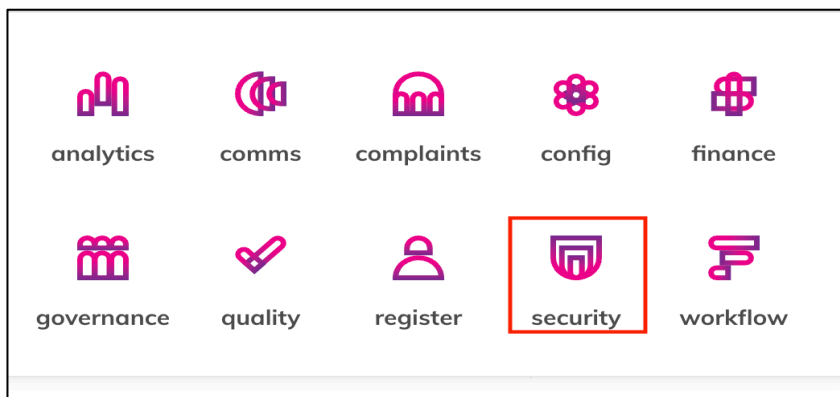
Instructions on How to Complete the Governance, Security, and Finance Exercises




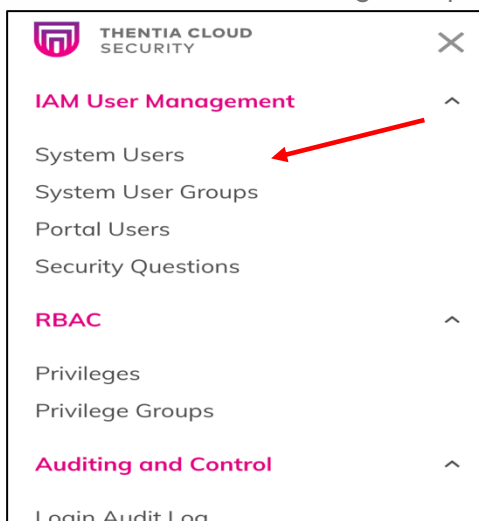
EXERCISE #1 ADDING A SYSTEM USER TO THE SYSTEM

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.

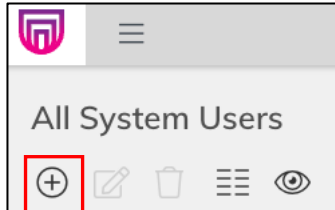
2. From the module selector , select the "Security" module.



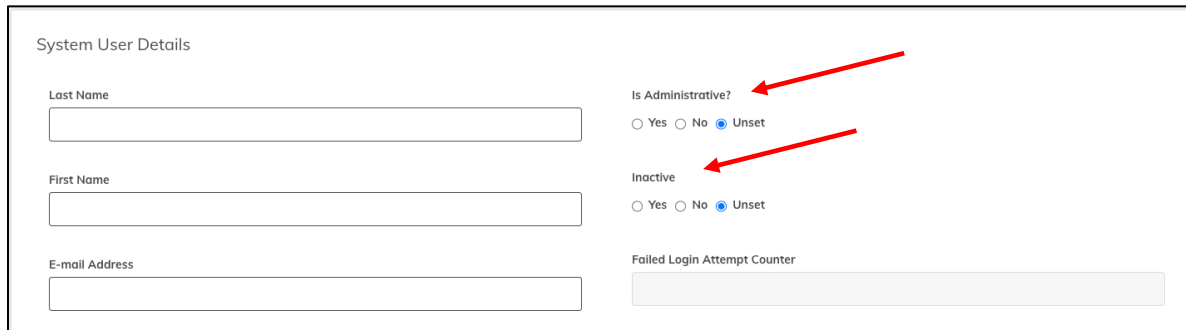
3. Open the hamburger menu  and select "System user under IAM User Management from the menu on the left navigation pane. Select System User



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



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



System User Details

Last Name

First Name

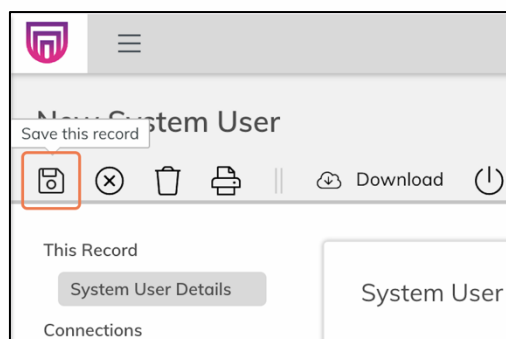
E-mail Address

Is Administrative?
☐ Yes ☐ No ☒ Unset

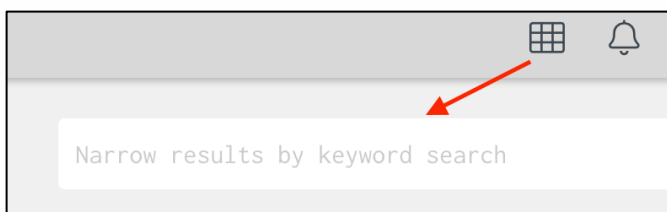
Inactive
☐ Yes ☐ No ☒ Unset

Failed Login Attempt Counter

6. Click Save



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

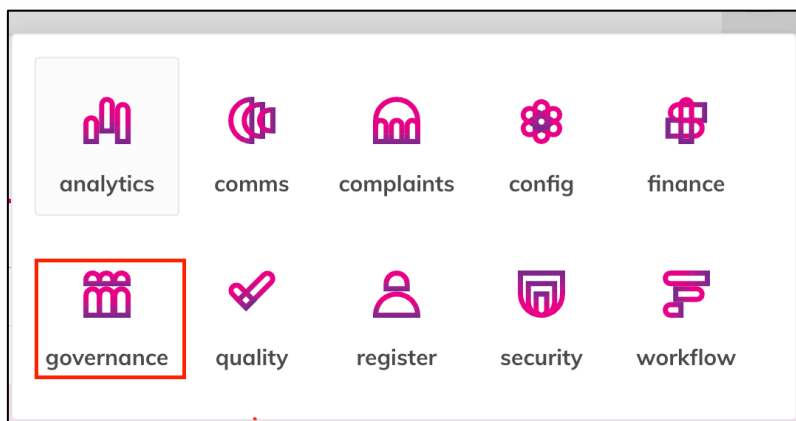



EXERCISE #2

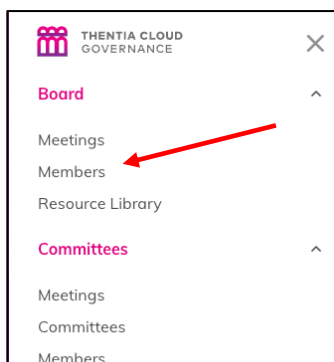
CREATING A BOARD MEMBER

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

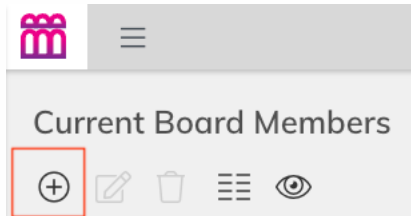
2. From the module selector , select the "Governance" module.



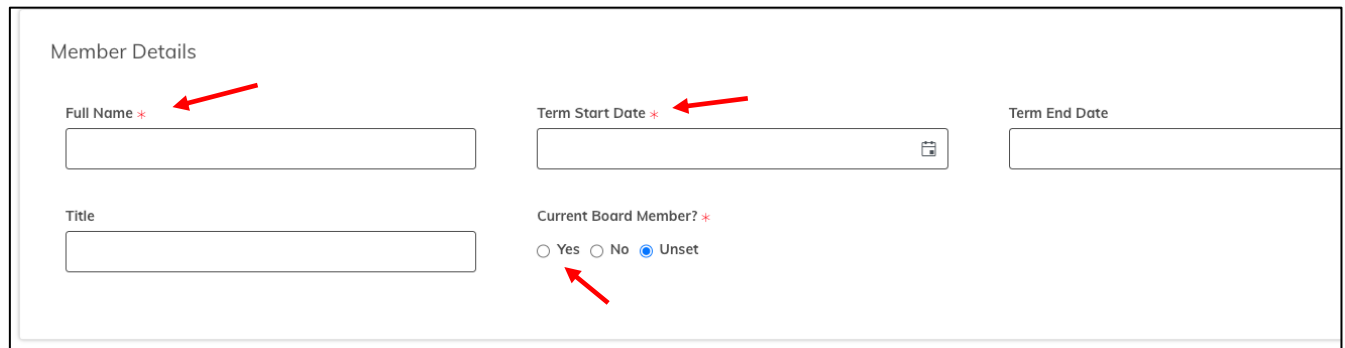
3. Open the hamburger menu  and select "Member user under Board from the menu on the left navigation pane. Select Member



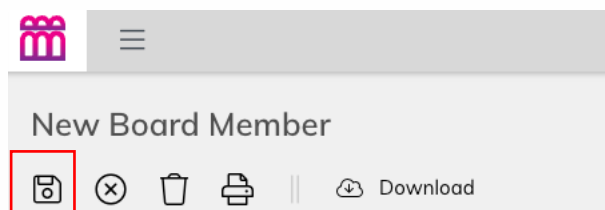
4. Click the + to add a **Current Board Member**



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**




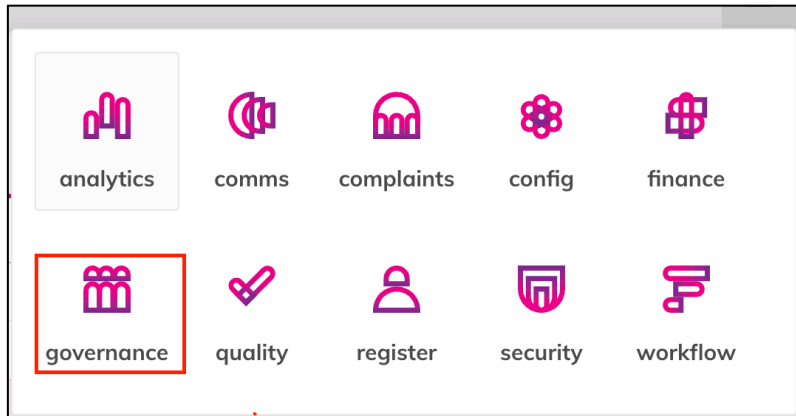
8. To save the record click the save icon.




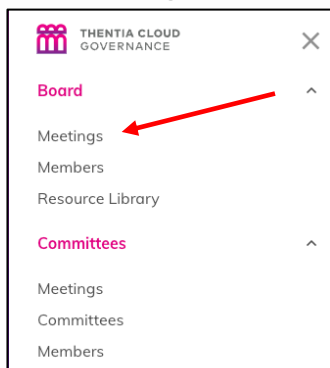
EXERCISE #3


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



- 

- New Board Meeting

RecordLetter Template

Download

This Record

Meeting Details

Conferring Details

Minutes Details

Connections

Agenda

Attendance

Meeting Details

Meeting Name *

Meeting Summary

B

I

U

Meeting Start Time *

Meeting End Time *

Quorum Achieved?

Meeting Location Information (Minutes)

- New Board Meeting

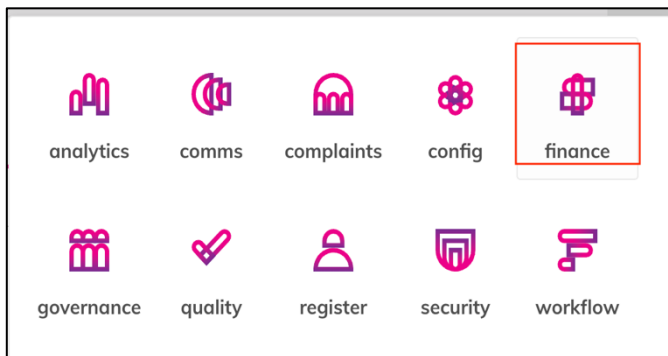
EXERCISE #4


CREATING AN INVOICE

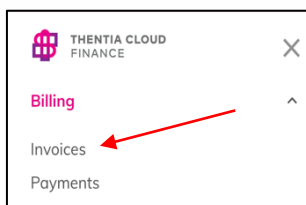
1. Click the Hamburger Menu and select **Invoice** under **Billing**.
2. Click the + Create New Invoice
3. Type in your **Profile, Business or Education Provider name**.
4. Save and copy your invoice number (so you can search for it) Save.
5. From menu on left **Under connections** select Items
6. Click + 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

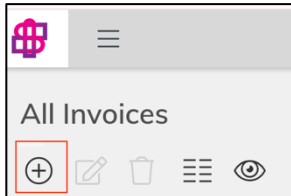
1. From the module selector , select the "Finance" module.



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



- Click the + Create New Invoice



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

Recipient

Profile

Business

Education Provider

Invoice Details

Invoice Date *

06/13/2024

Invoice Number

Due Date

Total Due

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

This Record

Recipients

Invoice Details

Files & Activities

Activities

Connections

Business Document Requests

Items

+

Narrow results by keyword search

Invoice	Fee Product	Amount	Credit Item	Amount Paid	Amount Refunded	Balance Due

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 *

①

000884 - Balance Owing

Name *

①

Fee Product *

①

Amount

①

Credit Item

①

☐ Yes
 ☐ No
 ☒ Unset

Amount Paid

①

Amount Refunded

①

Balance Due

①

Memo

①

B

I

U

11. To save the record click the save icon.

New Invoice Item

Download