



**THENTIA**  
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Regulatory  
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# Instructions on How to Complete the Analytics and Comms Exercises



## Exercise to do on your own time

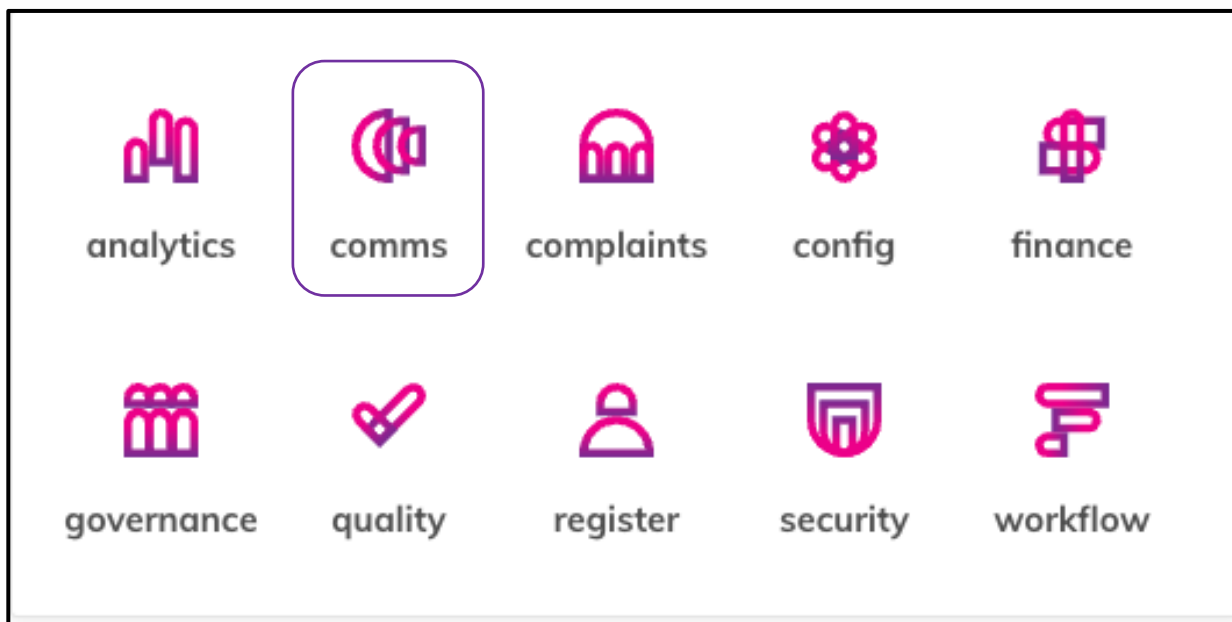
### Creating a message template, a report and charts

1. Please go the Comms Module to create a Message Template. Go back to check if the template that you created is available in your view.
2. Please go to the Analytics Module. Search for Individual License then run the report for 'Avg. Application Submission Time by Type (90 days)'. Export to Excel.
3. Finally, create two charts on the Analytics Module and save them with your initials.

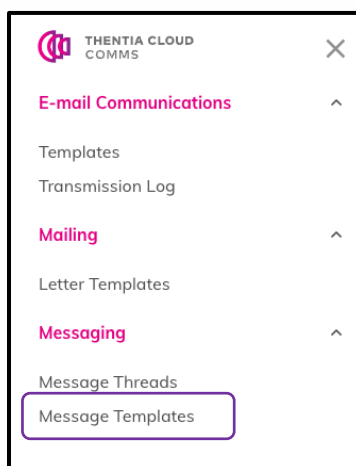
***If you need help with this exercise, please attend our next 'Ask the Trainer' session.***

## CREATING A MESSAGE TEMPLATE

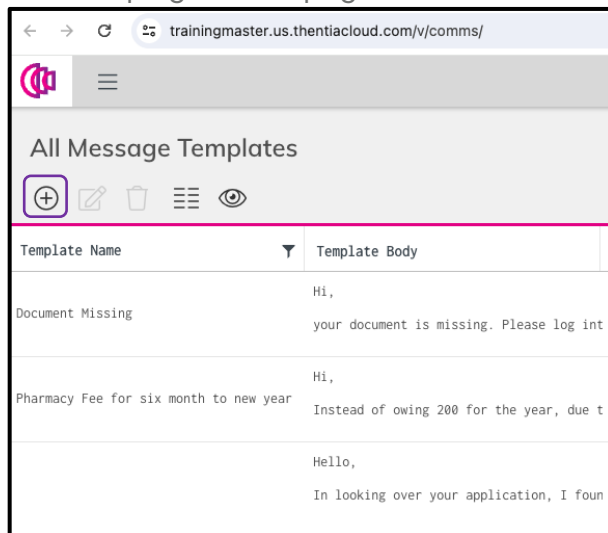
1. Go into the Comms Module, using the module selector in the right corner of the screen.



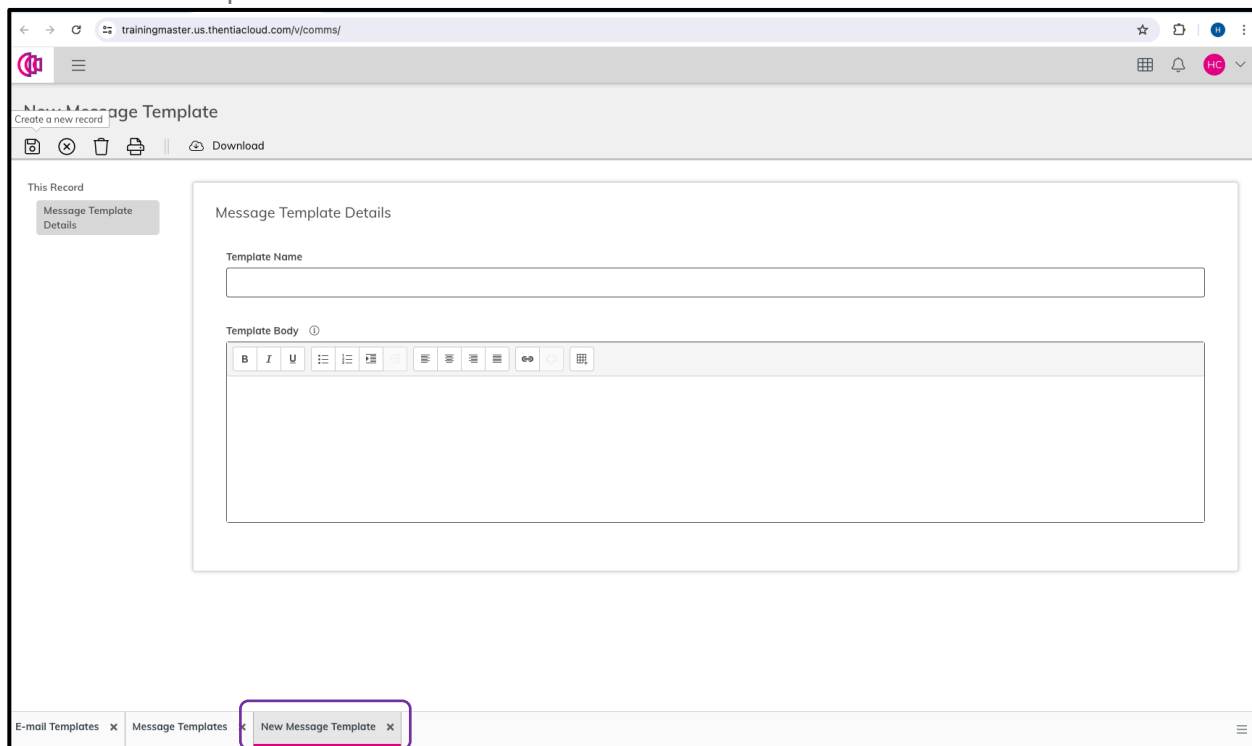
2. Then go to the Hamburger on the Left side.
3. Choose Message Template



- Click the “+” sign at the top right of the page.



- This will open a new breadcrumb.



- you are in Thentia's Training master, please put your name in front of the document, so we can remove it later.*

### Message Template Details

Template Name

Wrong Document. you sent in student ID instead of Driver's License

Template Body ⓘ



Hello,

In reviewing your application, we found that you attached your student ID rather than your Driver's License or other government ID with your picture. Could you please upload your Driver's License? Do not attach it to the return email, because it will not be in your application. You need to go to left side of the screen choose:

- Your Online Application,
- then on the far right side is a button called Documents.
- Please choose that and upload your Government issued ID.

Thank you,

Thentia Cloud Regulatory Agency






- Click Save at the top left and you should see your Template name at the top.

## Wrong Document, you sent in student ID instead of Driver's License



Download

8. Check to see if the message is in the message template section of the Comms module (it's probably the last item.

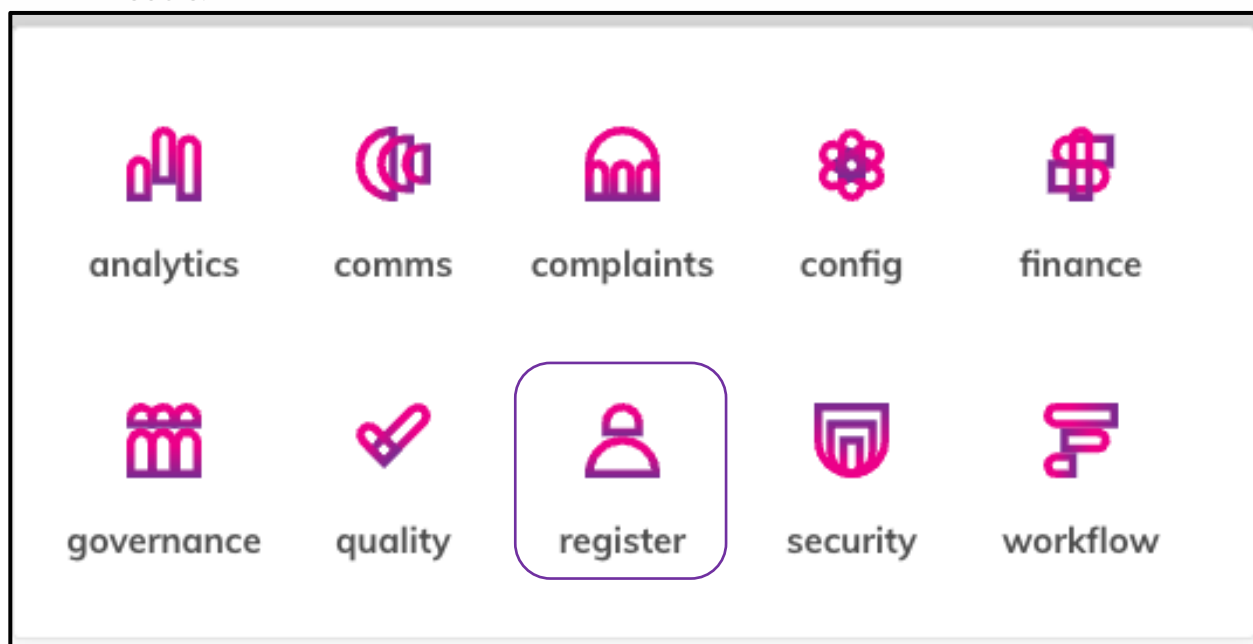
All Message Templates Filter results by keyword search


Template Name	Template Body	Created By	Created On	Modified By	Modified On
Need Driver's License - Lynn Demtryk	In order to process your application we  Thanks Lynn	Lynn Demtryk	May-28-2024 10:24 AM	L. Demtryk	May-28-2024 11:45 AM
Education history	Hello! Please make sure you are including your	support-mpj Firecall	May-22-2024 8:49 AM	support-mpj Firecall	May-22-2024 8:51 AM
Document Invalid	Hello, the document you uploaded is invalid. P  Thanks!	Mar Tina	May-22-2024 8:49 AM	Mar Tina	May-22-2024 8:58 AM
Wrong Document, you sent in student L.	Hello, In reviewing your application, we found <ul style="list-style-type: none"> <li>Your online Application,</li> <li>then on the far right side is a bu</li> <li>Please choose that and upload your Hilary Crandall</li> </ul> Thank you, Thentia Cloud Regulatory Agency		May-31-2024 5:25 AM	Hilary Crandall	May-31-2024 5:37 AM

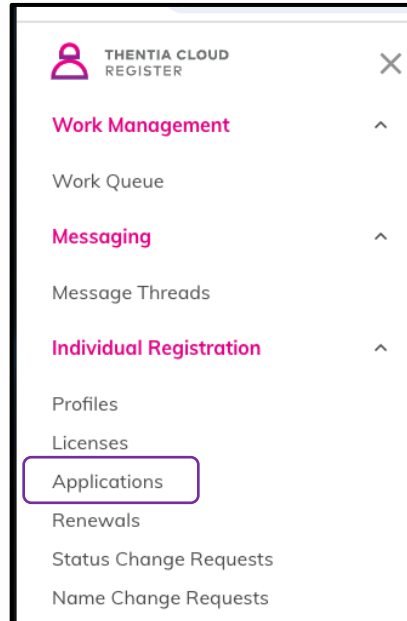
1 - 23 of 23 items

E-mail Templates Message Templates

9. To check if the message is available to your regulatory agency staff, go to the Register Module.








10. Then go to the Hamburger on the Left side. 
11. Choose Applications from the Hamburger menu



12. Open any application.

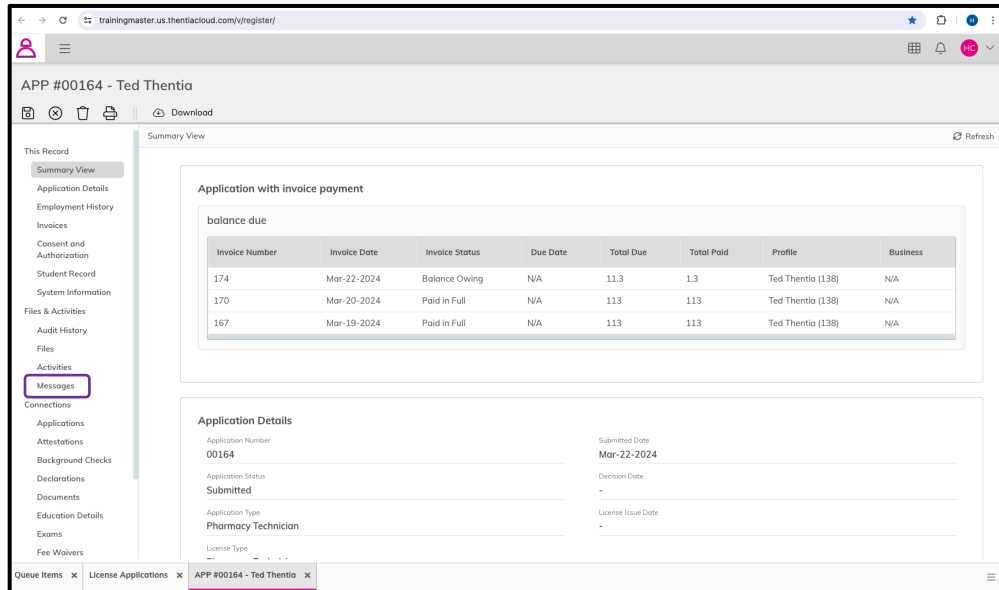
trainingmaster.us.thentiacloud.com/v/register/

Submitted Applications Narrow results

Application Number	Profile	Application Type	License Type	Submitted Date
00098	N/A N/A	Veterinarian Nurses	Veterinary	Feb-09-2024
00101	N/A N/A	Veterinarian Nurses	Veterinary	Feb-09-2024
00137	Jane Training	Provisional Licensed Professional Couns...	Examiners for Licensed Professio...	Jun-28-2023
00090	Finn Test	Optometry Licensure	Optometry Licensure	Mar-02-2023
00037	Amanda Anderson	Internationally Educated Nurse	Registered Nurse	Nov-07-2022
00138	Vineeth Test	Provisional Licensed Professional Couns...	Examiners for Licensed Professio...	May-10-2023

13. Click Messages on the Left Side and open.



trainingmaster.us.thentiacloud.com/v/register/

APP #00164 - Ted Thentia

Summary View

This Record

- Summary View
- Application Details
- Employment History
- Invoices
- Consent and Authorization
- Student Record
- System Information
- Files & Activities
- Audit History
- Files
- Activities
- Messages**
- Connections
- Applications
- Attestations
- Background Checks
- Declarations
- Documents
- Education Details
- Exams
- Fee Waivers

Application with invoice payment

balance due

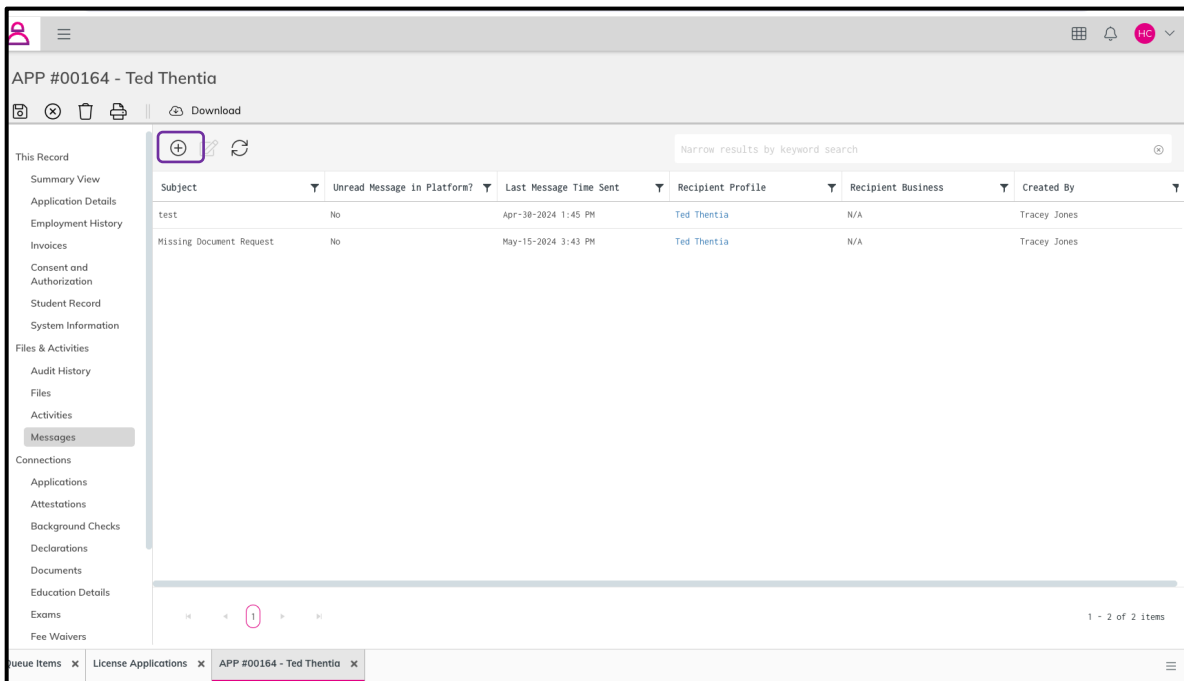
Invoice Number	Invoice Date	Invoice Status	Due Date	Total Due	Total Paid	Profile	Business
174	Mar-22-2024	Balance Owning	N/A	113	13	Ted Thentia (138)	N/A
170	Mar-20-2024	Paid in Full	N/A	113	113	Ted Thentia (138)	N/A
167	Mar-19-2024	Paid in Full	N/A	113	113	Ted Thentia (138)	N/A

Application Details

Application Number	Submitted Date
00164	Mar-22-2024
Application Status	Decision Date
Submitted	-
Application Type	License Issue Date
Pharmacy Technician	-
License Type	

Queue Items x License Applications x APP #00164 - Ted Thentia x

14. Click the "+" sign to open a new message.



APP #00164 - Ted Thentia

Summary View

This Record

- Summary View
- Application Details
- Employment History
- Invoices
- Consent and Authorization
- Student Record
- System Information
- Files & Activities
- Audit History
- Files
- Activities
- Messages**
- Connections
- Applications
- Attestations
- Background Checks
- Declarations
- Documents
- Education Details
- Exams
- Fee Waivers

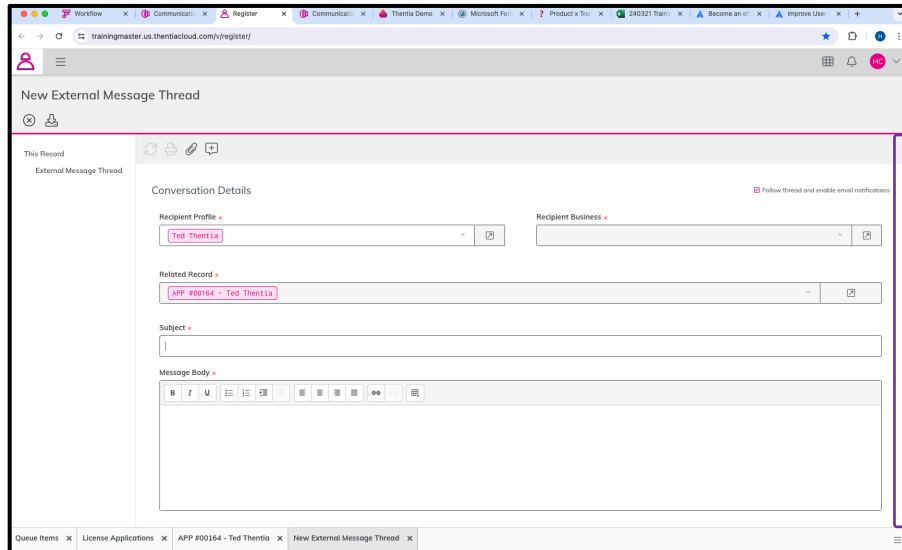
Narrow results by keyword search

Subject	Unread Message in Platform?	Last Message Time Sent	Recipient Profile	Recipient Business	Created By
test	No	Apr-30-2024 1:45 PM	Ted Thentia	N/A	Tracey Jones
Missing Document Request	No	May-15-2024 3:43 PM	Ted Thentia	N/A	Tracey Jones

1 - 2 of 2 items

Queue Items x License Applications x APP #00164 - Ted Thentia x

15. A new page opens and below the message body (you will need to scroll) you will find a button.



New External Message Thread

This Record  
External Message Thread

Conversation Details

Recipient Profile +  
Ted Thentia

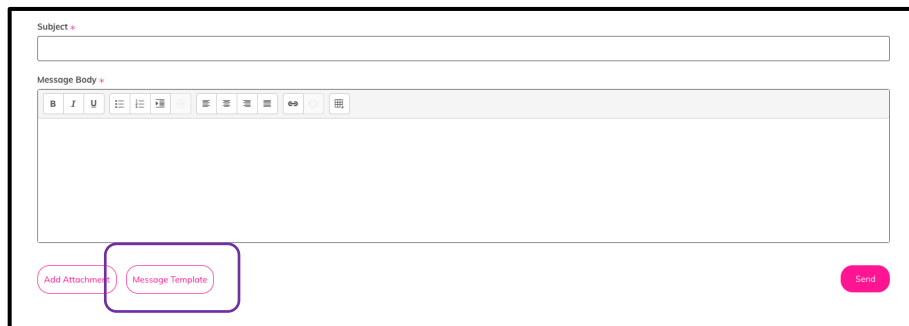
Recipient Business +

Related Record +  
APP #00164 - Ted Thentia

Subject +

Message Body +

Queue Items x License Applications x APP #00164 - Ted Thentia x New External Message Thread x



Subject +

Message Body +

Add Attachment Message Template Send

16. Clicking on Message Template will give you a new popup box. Click the drop down and scroll to find your message.

Message Template ✕

The message on the record page will be over written by the templated message.

Message Template

▼ 🔗

Message Preview:

Add Message Close

Message Template ✕

Message Template

▲ 🔗

Need Driver's License - NR

Leslie's request for missing diploma

Missing Docs for MB

Need Driver's License - Lynn Demytruk

Wrong Document, you sent in student ID instead of Driver's License

17. Choose that message and see if the message displays as you wrote it.

Message Template

The message on the record page will be over written by the templated message.

Message Template

Wrong Document, you sent in student ID instead of Driver's License

Message Preview:

Hello,  
  
In reviewing your application, we found that you attached your student ID rather than your Driver's License or other government ID with your picture. Could you please upload your Driver's License? Do not attach it to the return email, because it will not be in your application. You need to go to left side of the screen choose:

- Your Online Application,
- then on the far right side is a button called Documents.
- Please choose that and upload your Government issued ID.

Thank you,  
Thentia Cloud Regulatory Agency

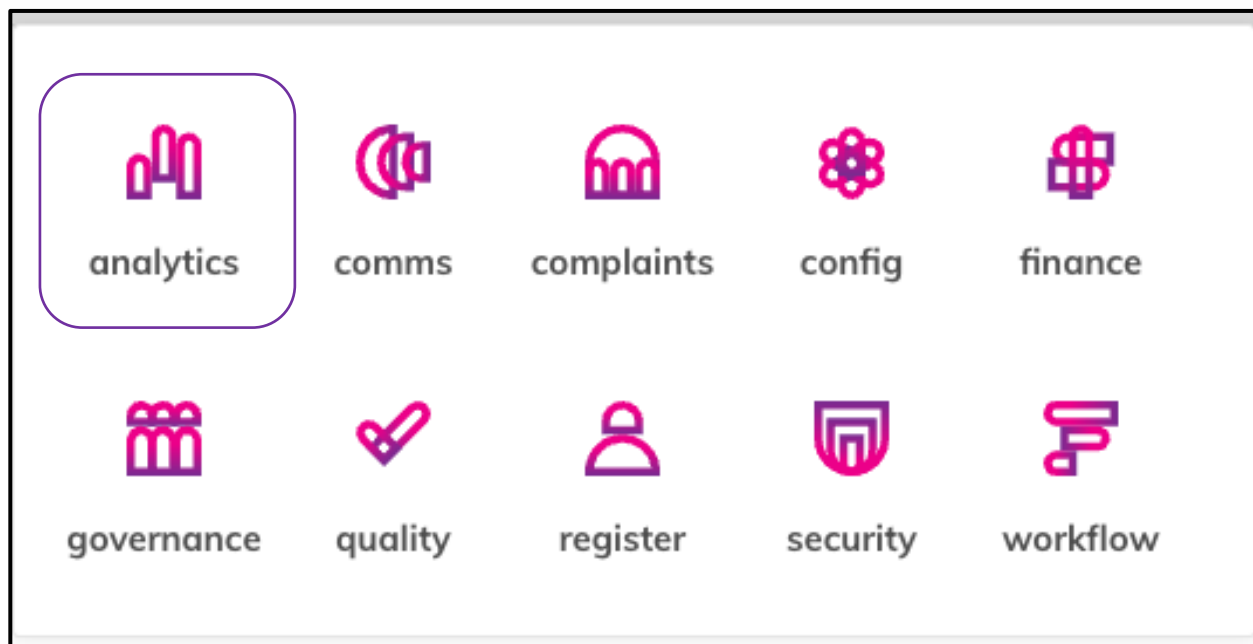
Add Message

Close

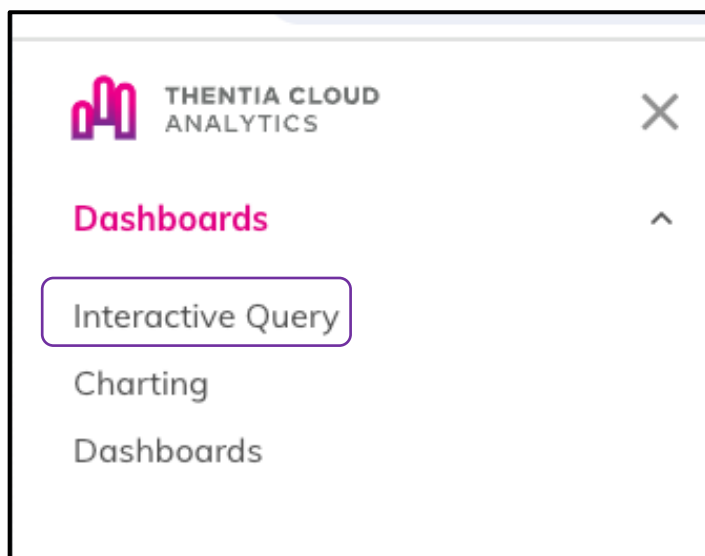
18. Close without saving.

## RUN A REPORT

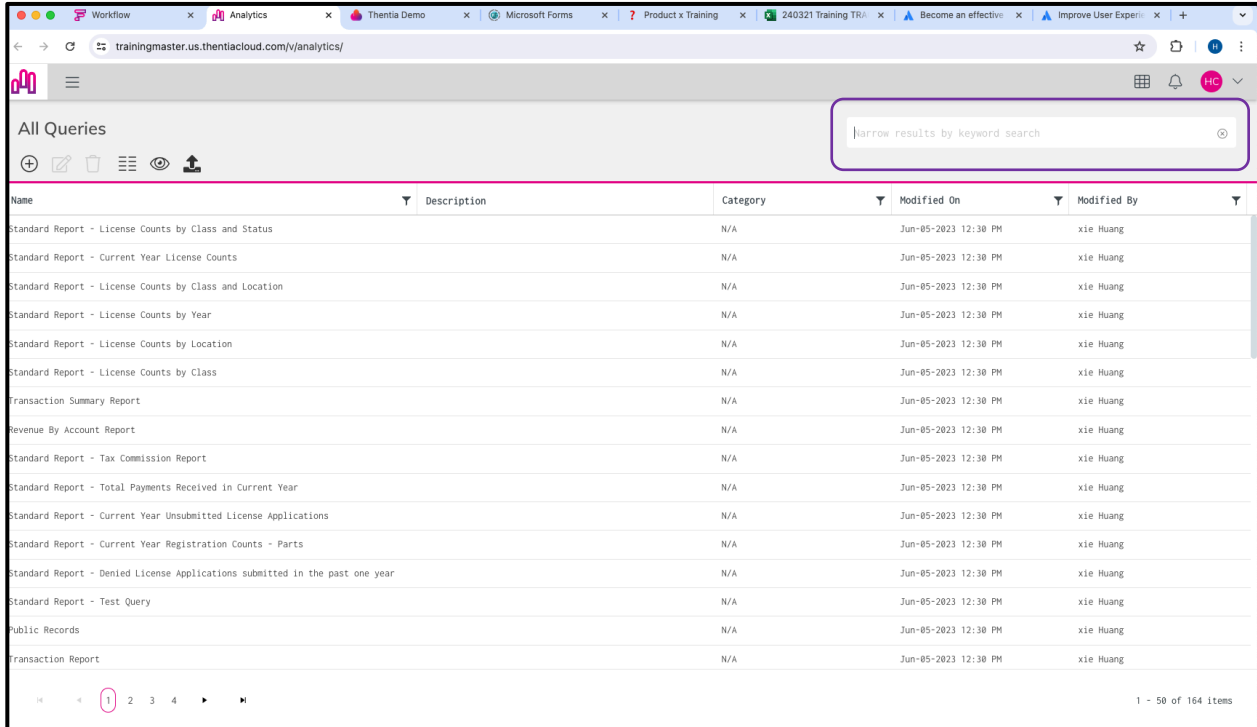
1. Use the module selector (Rubik's Cube) to go to the Analytics Module



2. Then go to the hamburger on the left side.
3. Choose Interactive Query.



- Go to the Search field on the top right of the page and enter “Individual License” then click enter.



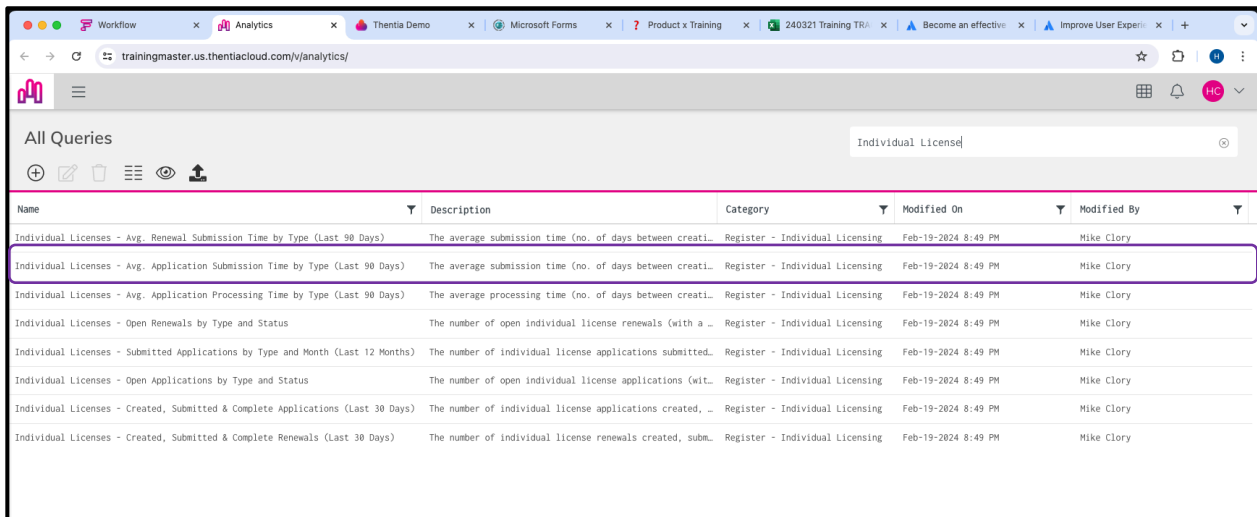
All Queries

arrow results by keyword search

Name	Description	Category	Modified On	Modified By
Standard Report - License Counts by Class and Status		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Current Year License Counts		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - License Counts by Class and Location		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - License Counts by Year		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - License Counts by Location		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - License Counts by Class		N/A	Jun-05-2023 12:30 PM	xie Huang
Transaction Summary Report		N/A	Jun-05-2023 12:30 PM	xie Huang
Revenue By Account Report		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Tax Commission Report		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Total Payments Received in Current Year		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Current Year Unsubmitted License Applications		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Current Year Registration Counts - Parts		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Denied License Applications submitted in the past one year		N/A	Jun-05-2023 12:30 PM	xie Huang
Standard Report - Test Query		N/A	Jun-05-2023 12:30 PM	xie Huang
Public Records		N/A	Jun-05-2023 12:30 PM	xie Huang
Transaction Report		N/A	Jun-05-2023 12:30 PM	xie Huang

1 - 50 of 164 items

- Double click on the report that has the Avg. Application Submission Time by Type (90 days).



All Queries

Individual License

Name	Description	Category	Modified On	Modified By
Individual Licenses - Avg. Renewal Submission Time by Type (Last 90 Days)	The average submission time (no. of days between creati...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Avg. Application Submission Time by Type (Last 90 Days)	The average submission time (no. of days between creati...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Avg. Application Processing Time by Type (Last 90 Days)	The average processing time (no. of days between creati...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Open Renewals by Type and Status	The number of open individual license renewals (with a ...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Submitted Applications by Type and Month (Last 12 Months)	The number of individual license applications submitted...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Open Applications by Type and Status	The number of open individual license applications (wit...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Created, Submitted & Complete Applications (Last 30 Days)	The number of individual license applications created, ...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory
Individual Licenses - Created, Submitted & Complete Renewals (Last 30 Days)	The number of individual license renewals created, subm...	Register - Individual Licensing	Feb-19-2024 8:49 PM	Mike Clory



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6. Once the report page opens, click on the “run” button (it says execute query if you hover).

Individual Licenses - Avg. Application Submission Time by Type (Last 90 Days)

Queries x Individual Licenses - Avg. Application S...

7. Information will now appear on the bottom right of your screen.

Individual Licenses - Avg. Application Submission Time by Type (Last 90 Days)

registration_class	application_type	average_submission_duration_days
Examiners for Licensed Professional Counselors	Provisional Licensed Professional Counselor (P-LPC)	0
Occupational Therapist	Occupational Therapist	0
Optometry Licensure	Optometry Licensure	0
Paramedic	Paramedic	0
Pharmacist	Pharmacist	1.1
Pharmacy Technician	Pharmacy Technician	4.3

1 - 10 of 10 items



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8. To Export to Excel, you will need to click on the paper with the bent corner and x in the middle of it. This icon did not become available until you ran the report. You will get a notification on your top right that it is downloaded.

Individual Licenses - Avg. Application Submission Time by Type (Last 90 Days)

Recent Download History

- thentia\_cloud\_analytics\_e... 31-2024-06-49-56.csv 548 B · Done

Full Download History

9. Double-click on the downloaded report and Excel should open with the information on it.

thentia\_cloud\_analytics\_extract\_05-31-2024-06-49-56

Home Insert Draw Page Layout Formulas Data Review View Automate

Paste Aptos Narrow (Bod... 12 A<sup>+</sup>

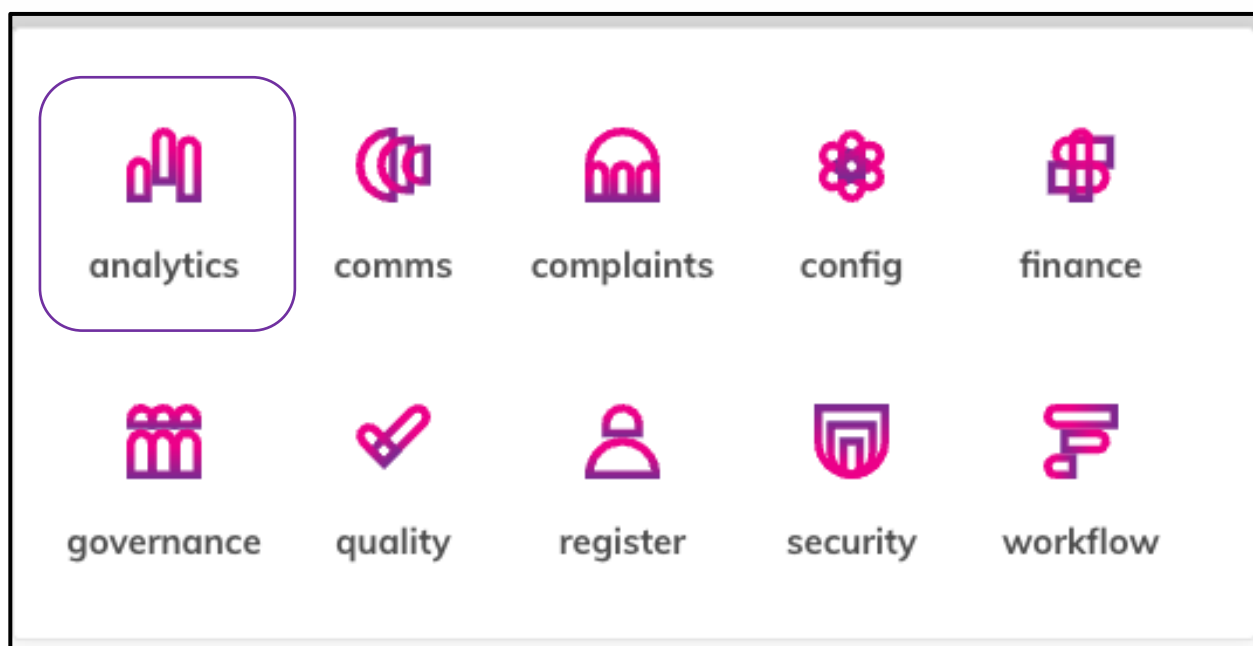
General Conditional Formatting Insert Delete Sort & Filter Find & Select Sensitivity Add-ins Analyze Data

Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Save As...

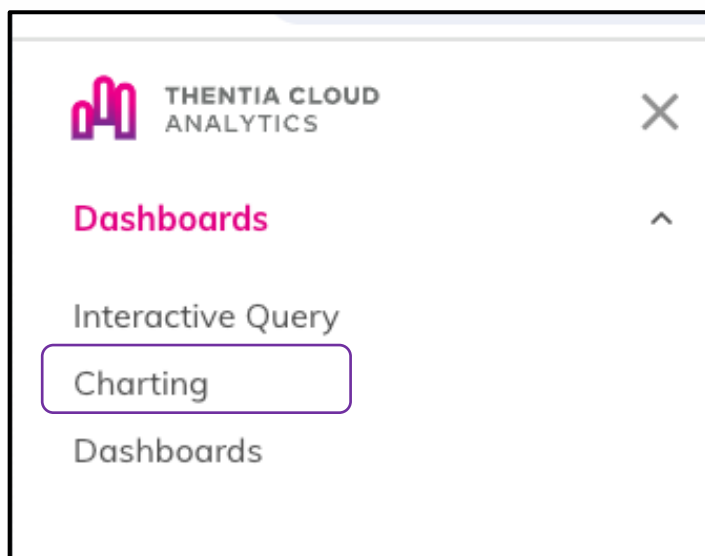
registration_class	application	average_submission_duration_days
Examiners to Provisional UI	Examiners to Provisional UI	0
Occupational Occupationala	Occupational Occupationala	0
Optometry UI Optometry UI	Optometry UI Optometry UI	0
Paramedic Paramedic	Paramedic Paramedic	0
Pharmacist Pharmacist	Pharmacist Pharmacist	1.1
Pharmacy Te Pharmacy Te	Pharmacy Te Pharmacy Te	4.3
Physician Ge Physician Ge	Physician Ge Physician Ge	0
Respiratory C Respiratory C	Respiratory C Respiratory C	0
Veterinary Veterinarian	Veterinary Veterinarian	0
Veterinary Veterinarian	Veterinary Veterinarian	0.2

## CREATE CHARTS (TO CREATE TWO—FOLLOW THESE DIRECTIONS TWICE – CHOOSING A NEW QUERY)

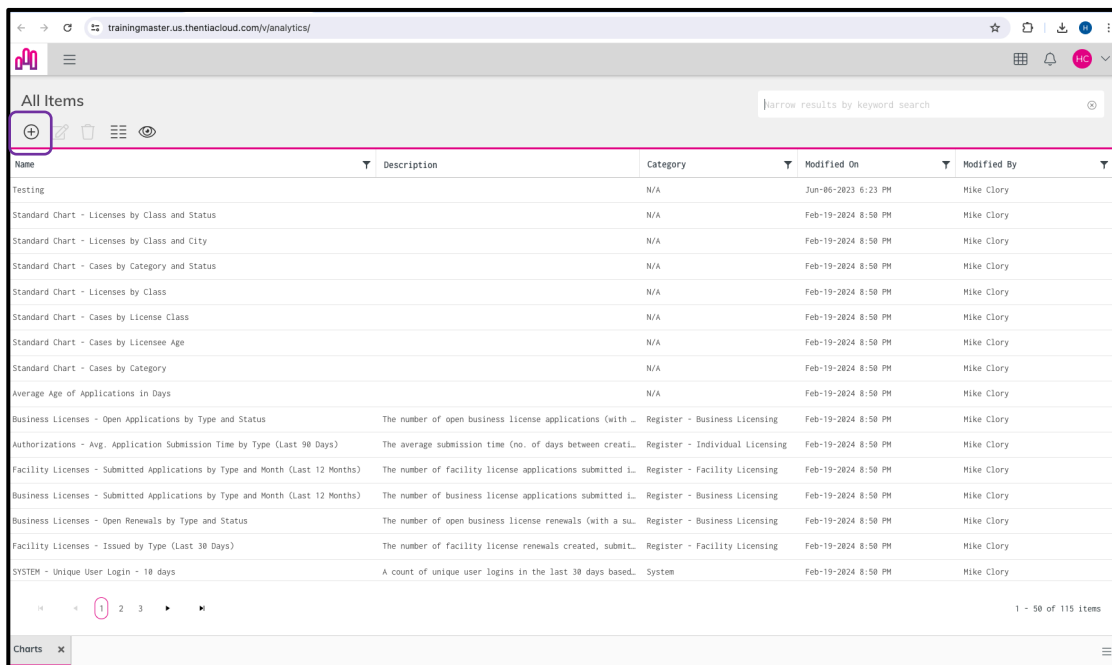
1. Use the module selector (Rubik's Cube) to go to the Analytics Module



2. Then go to the hamburger on the left side.
3. Choose Charting.



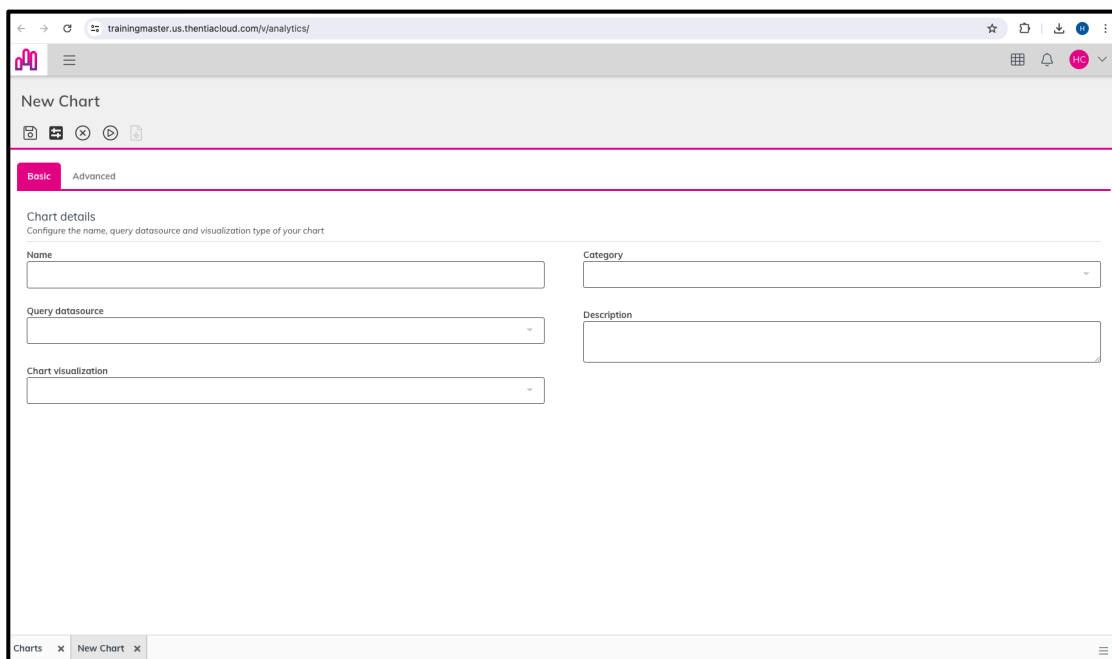
- When the charts breadcrumb opens, you will choose the “+” sign at the top left to add a new chart.



The screenshot shows the 'All Items' section of the analytics dashboard. A red box highlights the '+' icon in the top left corner of the 'All Items' section. Below the header, there is a table with columns: Name, Description, Category, Modified On, and Modified By. The table lists various charts and their details. At the bottom of the table, there is a pagination bar showing '1 - 50 of 115 items'.

Name	Description	Category	Modified On	Modified By
Testing		N/A	Jun-06-2023 6:23 PM	Hike Clory
Standard Chart - Licenses by Class and Status		N/A	Feb-19-2024 8:50 PM	Hike Clory
Standard Chart - Licenses by Class and City		N/A	Feb-19-2024 8:50 PM	Hike Clory
Standard Chart - Cases by Category and Status		N/A	Feb-19-2024 8:50 PM	Hike Clory
Standard Chart - Licenses by Class		N/A	Feb-19-2024 8:50 PM	Hike Clory
Standard Chart - Cases by License Class		N/A	Feb-19-2024 8:50 PM	Hike Clory
Standard Chart - Cases by License Age		N/A	Feb-19-2024 8:50 PM	Hike Clory
Standard Chart - Cases by Category		N/A	Feb-19-2024 8:50 PM	Hike Clory
Average Age of Applications in Days		N/A	Feb-19-2024 8:50 PM	Hike Clory
Business Licenses - Open Applications by Type and Status	The number of open business license applications (with a...	Register - Business Licensing	Feb-19-2024 8:50 PM	Hike Clory
Authorizations - Avg. Application Submission Time by Type (Last 90 Days)	The average submission time (no. of days between creati...	Register - Individual Licensing	Feb-19-2024 8:50 PM	Hike Clory
Facility Licenses - Submitted Applications by Type and Month (Last 12 Months)	The number of facility license applications submitted i...	Register - Facility Licensing	Feb-19-2024 8:50 PM	Hike Clory
Business Licenses - Submitted Applications by Type and Month (Last 12 Months)	The number of business license applications submitted i...	Register - Business Licensing	Feb-19-2024 8:50 PM	Hike Clory
Business Licenses - Open Renewals by Type and Status	The number of open business license renewals (with a su...	Register - Business Licensing	Feb-19-2024 8:50 PM	Hike Clory
Facility Licenses - Issued by Type (Last 30 Days)	The number of facility license renewals created, submit...	Register - Facility Licensing	Feb-19-2024 8:50 PM	Hike Clory
SYSTEM - Unique User Login - 10 days	A count of unique user logins in the last 30 days based...	System	Feb-19-2024 8:50 PM	Hike Clory

- A New Chart screen will open.



The screenshot shows the 'New Chart' screen in the analytics dashboard. The screen has a header with the title 'New Chart' and a sub-header 'Basic' (selected) and 'Advanced'. Below the header, there is a section titled 'Chart details' with the instruction 'Configure the name, query datasource and visualization type of your chart'. The form contains the following fields:

- Name:** A text input field.
- Category:** A dropdown menu.
- Query datasource:** A dropdown menu.
- Description:** A text area.
- Chart visualization:** A dropdown menu.

At the bottom of the screen, there is a breadcrumb trail showing 'Charts > New Chart'.



6. You will need to fill out the chart. For Name, use your name first and then a description of what the name of your chart is.
7. For the query data source—this is the interactive query (report) that you want the chart from. You can use a word in the field to narrow down to the report you want to use.

### Chart details

Configure the name, query datasource and visualization type of your chart

**Name**

**Query datasource**  

▲

Facility Locations JW

License Counts by Location JW

Standard Report - License Counts by Location

Standard Report - License Counts by Location

Standard Report - License Counts by Class and Location

Standard Report - License Counts by Class and Location

8. The chart visualization is a drop down, you can choose those that you feel is the correct chart for your audience. For this example choose Bar.

**Query datasource**  

Standard Report - License Counts by Location

▼

**Chart visualization**  

▲

Area

Bar

Bubble

Donut

Funnel

Gauge



9. This opens a new part of the chart information on the bottom of the page. X and Y axis are now available and prefilled in. The X and Y axis should not stay the same. So leave X as `reg_city`, click the drop down on Y.

Chart details

Configure the name, query datasource and visualization type of your chart

Name

Robin--chart of licenses by location

Category

Query datasource

Standard Report - License Counts by Location

Description

Chart visualization

Bar

Configure X and Y axes

Configure how your chart should display your data by selecting an x-axis field and a y-axis field

X-axis

reg\_city

Y-axis

reg\_city

10. The drop down has two choices. Choose `reg_count`.

Y-axis

reg\_city

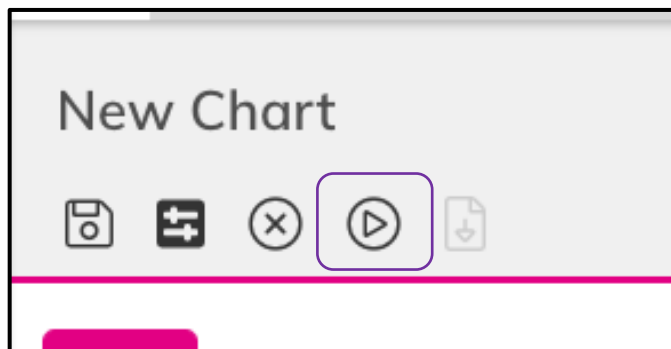
reg\_region

reg\_count

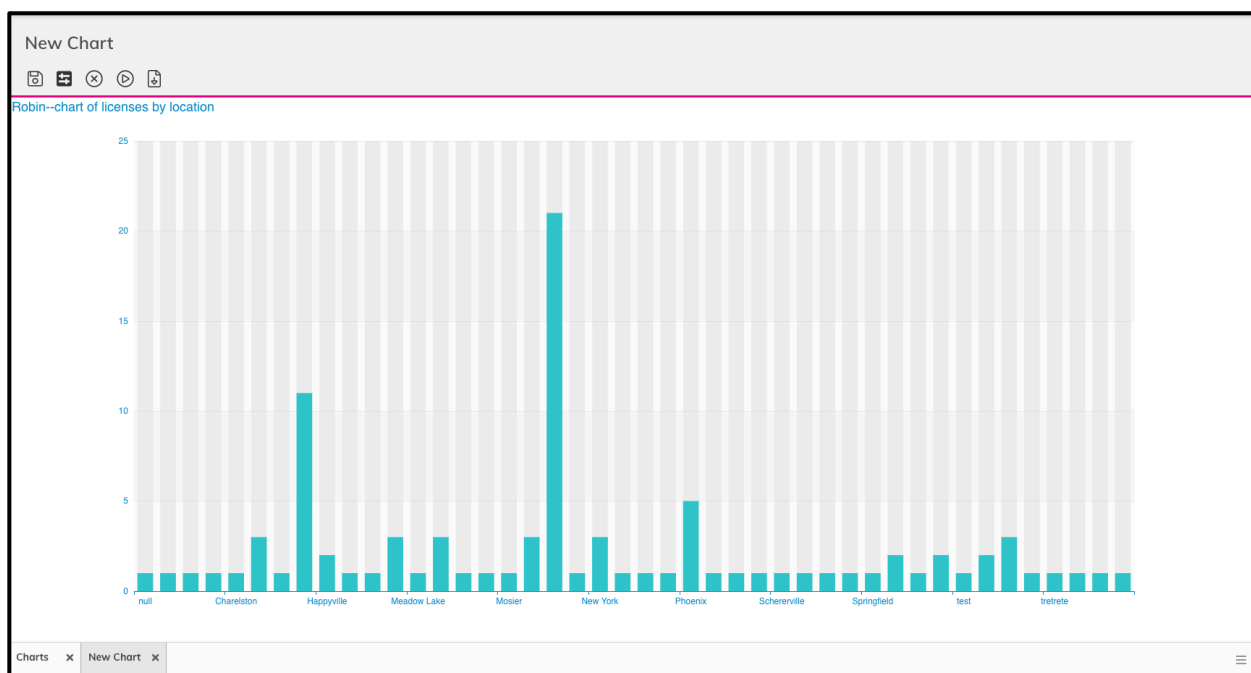
Y-axis

reg\_count

11. To run the report, you need to click on the Play button at the top left. Don't save until you check if the chart is what you want to use.

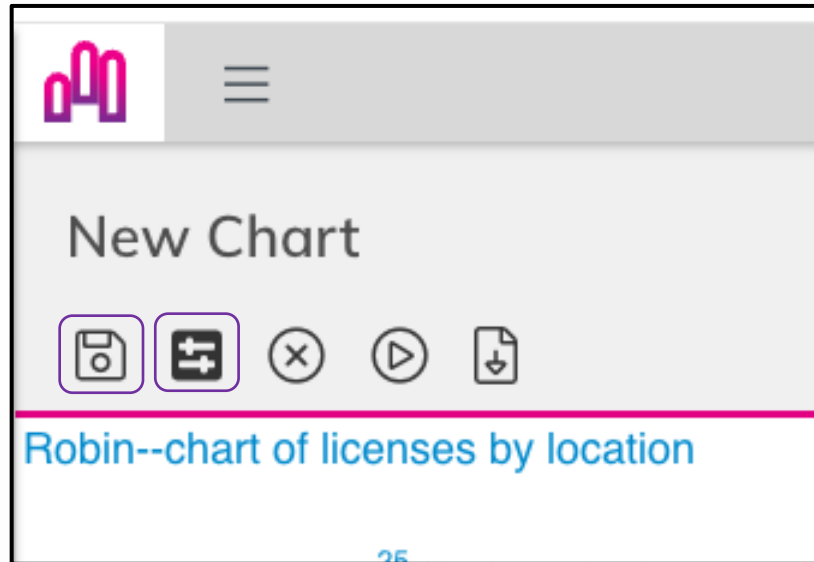


12. When you click the play button, your new chart will appear.





13. If you like this chart as is—click the Save icon, but if you prefer to check out some of the other possible chart visualisations, click on the black square with the sliders. And it will return you to the basic chart page, allowing you to make changes to the visualization.



14. If you clicked on Save – your name for the chart appears where New Chart is at the top of the chart, and you are finished with the first chart.

15. If you clicked on the black slider square, you will be returned to the basic chart page. Click on the chart visualization and work through the list of possible charts, changing up the X, Y (and sometimes Z values) until you find the chart you want and then Save.