



AMEE FLOW
Balancing Energy, Workload, and Efficiency

Quick Reference Guide: Project Managers

Framework for Leaders Organizing Workflows

This guide outlines the essential steps for setting up a project and the key features of the AMEE Flow platform.

Login and Account Access

- Use the credentials sent to your email after your organization account is created.
- Log in via the **Project Manager tab**, select your organization, and change your password if needed.
- Check your spam/junk folders if the email doesn't appear with your login credentials.

The screenshot shows the AMEE Flow login page. On the left, there's a sidebar with tabs for "User" and "Project Manager". The "Project Manager" tab is highlighted with a red oval. Below it, there's a "Project Manager Log In" section with fields for "Organization *" and a dropdown menu showing "California State University-Northridge". At the bottom is an orange "Continue" button. The main area on the right has a blue-to-orange gradient background and displays the text "Welcome to AMEE Flow!" followed by a brief description and two bullet points.

Welcome to AMEE Flow!

Your personalized assessment management platform is just a login away!

- Access powerful tools to streamline assessment tasks, track progress, and support continuous improvement-all in one intuitive system.
- **Don't have an account?** Contact your system administrator for login credentials.

Step 1**Creating a New Project**

- Go to Main Workspace → Click + Project
- Enter: Project Name, Term (e.g., Fall, Spring), and Year.
- Click Save

TOOL TIP Once your project has been created, you may choose to **copy** it for reuse or **delete** it if no longer needed by clicking the appropriate action buttons.

Create your project

Project Name/Title *
<input type="text" value="Add Title Here"/>
Term *
<input type="text" value="Select..."/>
Year *
<input type="text" value=""/>
Save

Step 2**Role Assignments-Pre-Load Your Team**

- Preload your team before assigning tasks.
- Go to **Role Assignments** → Click **Add New**, then add details for each team member, including Name, Email, Department / Unit, Oversight Unit, Assigned Role

NOTE: The roles in AMEE Flow include: (1) **Area Expert** – Completes tasks, (2) **Collaborator** – Supports or contributes to tasks needed, and (3) **Reviewer/Approvers** – Provides feedback, reviews, or approval for certain task activities.

1. Complete the fields,
 2. Assign the new user to a project,
 3. Set privileges for each user
 4. Click the **Save** button.

Tooltip: When a role is assigned to a user, they'll automatically receive an email with login instructions specific to that role. You can resend login credentials at any time or remove the role if it's no longer needed.

Now go back to the **MAIN WORKSPACE** tab and click on the project name to start creating and managing your tasks.

Project	Term - Year	Status	Action
iROCA	Fall - 2025	Active	Edit
ACIRP	Spring - 2026	Active	Edit
Marketing Campaign Summer 2025-Demo	Summer - 2025	Active	Edit
Test1	Spring - 2026	Active	Edit
National Assessment Week Planning Committee	Fall - 2025	Active	Edit

Step 3**Create and Manage Tasks**

A. Click the pencil icon to create a label for your main task and add a description

Main Workspace

Project: iROCA 2025-2026 ACIRP (Spring - 2026)

Main Task	Assigned To	Priority	Due Date	Notification Required?
<input type="checkbox"/> Task 3				<input checked="" type="checkbox"/> No

+ Add task

Task Details

Task Name/Label *

Description *

Sub Task (optional)

Subtask Label Subtask Short Description

- B. Write the main task description
1. Use the AI Generator to reduce the writing burden
 2. Add subtasks related to the main task
- C. Assign each task a priority status
- D. Give each task a due date
- E. Determine if the task requires notifications

TOOL TIP: Complete A, B, C, & D before assigning tasks in F.

Project: Marketing Campaign Summer 2025 (Summer - 2025)

Main Task	Assigned To	Priority	Due Date	Notification Required?
<input type="checkbox"/> Task 2				<input checked="" type="checkbox"/> No
<input type="checkbox"/> Task 3				<input checked="" type="checkbox"/> No
<input type="checkbox"/> Task 1: Design Social Media Graphics		Critical High Medium Low	07/10/2025	<input checked="" type="checkbox"/> Yes

+ Add task

- F. To add a team member to a task
- click the **Plus** button and
 - slide the toggle button to yes to add a member.

Then click Save and Update.

Assign Roles

Task 1: Design Social Media Graphics

Name	Role	Action
Elikas Amarac	Reviewers / Approvers	
ANkit Part.	Collaborators	
Red Robbin	Area Expert	
Ankit Bhogre	Area Expert	

TOOL TIP: After assigning a role, click the **blue airplane icon** to create and send a customized notification to the selected recipients.

Step 4

Sending Notifications

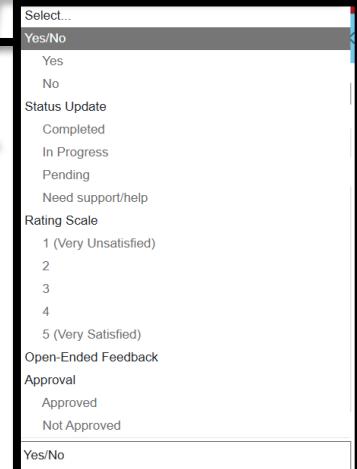
- After clicking the notification button, follow these steps:

 - Enter the title and the content you want the recipient to receive.
 - Use the AI Generator to assist you.
 - Add a “send” notification date, a **follow-up** notification date (if needed), and a response option (if a response to the notification is required).

The screenshot shows the 'Notification' screen. At the top, there's a message area with an 'AI Generator' button. Below it are fields for 'Due Date', 'Send Date', 'Follow up Date', and 'Response Option'. A red bracket on the left groups the 'Due Date' and 'Send Date' fields. A red arrow points from the 'Response Option' field to a dropdown menu on the right.

There are five response options:

- Yes/No
- Status update
- Satisfactory rating scale
- Open-ended text box
- Approval



TOOL TIP: These are the only available response options. If you use the response option, add instructions to your notification field textbox.

Now, select all recipients to receive the notification populated under the "Assign recipients" list button.

The screenshot shows the 'Assign Recipients' screen. It has a 'Check All' button at the top left. Below it is a list of three recipients: Ankit Bhogre (Area Expert), Red Robbin (Area Expert), and Elikas Amarac (Reviewers / Approvers). Each recipient has a checked checkbox next to their name. A red box surrounds the 'Check All' button, and a red arrow points from the 'Check All' button to the 'Save' button at the bottom.

Step 5

Planning Documents

5A. Document 1-The Alignment Map and the Schedule of Courses work together and both are needed to function on the platform.

- Download the Excel templates using the labels provided and fill in the template.

The screenshot shows the AMEE Flow interface with the 'Master Alignment Map' selected in the sidebar. The main area displays a grid titled 'Master Alignment Map' with columns for Course and various ISLO and PSLO outcomes. A red box highlights the 'Download' button at the top right. A red dashed arrow points from this button to a callout box containing a smaller screenshot of the 'Update your master alignment map' dialog for the course ART-140. This dialog shows alignment status for ISLO 1 through PSLO 4, with a red arrow pointing to the 'Yes' toggle button for ISLO 1.

- Click the **Update Map** button to upload the completed template to manage the fields.
- Use the **pencil icon** to edit the row. Simply, move the toggle button to align the course to the outcome.
- Click the **eye icon** to see feedback on the alignment map.

TOOL TIP: To obtain a new alignment map, download the latest version to ensure you have the most up-to-date changes. Then upload again.

NOTE: To delete a course, select the course and click the “delete” button.

5B Document 2-Course Enrollment AKA (Schedule of Courses)

- Start by downloading the Excel template, fill in the template, then upload the template.

TOOL TIP: To manage the template, click the pencil icon on each row to edit the fields as needed, and then save. Don't forget to download the latest file.

Course	Class/Sec.	Enroll.	Faculty	Dept. Name	Modality	Level	Type	Action
ACCT-220 ACCT FOR BUS	667788 (7)	100	Jackson, Michael fl@gmail.com		hybrid	lower division	GE	
ART-140 POTTERY	11262 (2)	28	Washburne, Pattie wpa@gmail.com		traditional	lower division	GE	
		22	Gevorkian, Monique gm@gmail.com		traditional	graduate	ELECTIVE	
		34	Tindage, Lisa fl@gmail.com		traditional	lower division	GE	
		23	Leily, Farkvar fl@gmail.com		traditional	upper division	ELECTIVE	
		28	Tyson, Mike fl@gmail.com		hybrid	upper division	CORE	

5C Document 3-Other Documents: Add documents or links as needed to share with your team. Click the “Add New” button to start.

Document Name/Title	Project	Action
College Assessment Lead Agreement	iROCA	
Boosting Engagement: AMEE Flow Email Best Practices	iROCA	
Task 1-Cal Agreement Guide	iROCA	
Task 2-Attend Virtual Orientation/Training	iROCA	
Task 3-Organize iROCA Kick Off Meeting(s)	iROCA	
Task 4-Prepare a College Course Sampling Plan	iROCA	
Task 5-Generate the Course Sampling Plan	iROCA	

Allowable files include URLs, PDFs, EXCEL, PPTs, DOCs

Step 6

Team Reports

There are three kinds of reports available for review. Depending on your access, you can review the following reports: (1) **Sampling Plans**, (2) **LOADs Reports** (Learning Outcomes Assessment Data), and (3) **General Reports**.

To view submitted reports, select the type of report you want to see and click on the name of the report to view it.

#	Term & Year	Created On	Feedback	Approval(s)
1	Summer - 2025 ⓘ	07/24/25, 05:21 AM	View (0)	
2	Summer - 2025 ⓘ	07/28/25, 06:44 AM	View (0)	

TOOL TIP: If feedback has been provided, click “View” to access it. All approvals can be reviewed in the last column for easy reference.

NOTE: Access to reports may vary by project manager account. Some reports are restricted based on assigned roles or project permissions.

Step 7**Professional Development Calendar**

Click professional development on the left menu. To add an event or meeting to the calendar, click the date and complete the text fields.

The screenshot shows the AMEE Flow application interface. On the left, there's a sidebar with a user profile for 'Sakile Camara - Project Manager' and a main navigation menu. The 'Prof. Development' option is selected. The main area is titled 'Calendar Schedule' and shows a monthly calendar for August 2025. A specific event, '01:00 PM National Assessme', is listed for Friday, August 31st. In the bottom-left corner, a modal window titled 'Add your event' is open. This modal includes fields for 'Event Name/Title', 'Date', 'Start Time', 'End Time', 'Timezone', 'Event Description', 'Event URL', and a 'Save' button. A dropdown menu for 'Timezone' is open, listing various time zones like 'India Standard Time (IST)', 'Pacific Standard Time (PST)', etc. A red arrow points from the 'Timezone' dropdown to the list of time zones. A red box highlights the entire 'Add your event' modal. A red arrow also points from the 'Public URL' button in the top right of the calendar view to the 'Public URL' button in the modal.

Include:

- Event Title,
- Date,
- Start and End Time,
- Time zone,
- Description of event,
- URL Link (if needed).

Use the **Public URL** to share the calendar with others.

Step 8**Analytics**

Select a project to monitor progress and task completions.

Analytics

SAKILE CAMARA

iROCA
Term/Year: Fall - 2025
Created On: 06/22/2025, 05:45 AM →

ACIRP
Term/Year: Spring - 2026
Created On: 06/22/2025, 10:12 AM →

Marketing Campaign Summer 2025-Demo
Term/Year: Summer - 2025
Created On: 07/05/2025, 02:03 PM →

Test1
Term/Year: Spring - 2026
Created On: 07/09/2025, 02:59 PM →

National Assessment Week Planning Committee
Term/Year: Fall - 2025
Created On: 07/21/2025, 10:47 AM →

View overall completed tasks, overdue items, and user activity.

Project Progress

Project: National Assessment Week Planning Committee - Fall 2025

Expected Tasks 104 **Tasks Submitted** 14 **Overdue Tasks** 0

Main Task	Priority	Due Date	Completed Tasks	Tasks in Progress	Not Started Tasks	Avg. Completion
Task 1-Attend the National Assessment Week Regional Rep Virtual Meet and Greet ⓘ	Medium	07/31/2025	10	0	17	<div style="width: 37.04%;"></div> 37.04%
Task 2-Access and Review Documents in the NAW Box Folder ⓘ	High	08/01/2025	4	0	19	<div style="width: 17.39%;"></div> 17.39%
Task 3: Attend Fall NAW first Planning Committee Meeting ⓘ	Medium	09/09/2025	0	0	27	<div style="width: 0%;"></div> 0%
Task 4-NAW Planners Step 1-Post Your Suggestion ⓘ	High	11/24/2025	0	0	27	<div style="width: 0%;"></div> 0%

TOOL TIP: Click the **main task name** to view full task details, including a list of individual members who have completed each associated subtask. You may **download** the task in an Excel file for your personal use.

Step 9**How to Grant Guest Access to Your Project Management Dashboard****Navigate to Guest Access**

From the Main Navigation Panel on the left side of your screen, click on "Guest Access."

Add a New Guest

Click the "Add New" button at the top of the Guest Access screen.

The screenshot shows the AMEE Flow software interface. On the left, there's a main navigation panel with various options like 'Main Workspace', 'Role Assignments', 'Planning Documents', 'Team Reports', 'Prof. Development', 'Analytics', and 'Guest Access'. The 'Guest Access' option is highlighted with a red box. The main content area is titled 'Access' and shows a table for 'Guest Access'. The table has columns for Name, Email, Contact #, Date Added, Status, and Action. At the top right of the table, there's a blue button labeled '+ Add New' which is also circled in red. The bottom of the screen shows copyright information: 'Copyright © 2010 – 2025 AMEE Flow, All rights reserved.'

The screenshot shows a 'Guest Access' form. At the top, it says 'Guest Access'. Below that, there are three input fields: 'Full Name *', 'Email ID / Login ID *', and 'Contact Number *'. Underneath, there's a section titled 'Set Privileges' with a grid of checkboxes. The checkboxes are arranged in four rows: Row 1: 'Main Workspace', 'Role Assignments', 'Master Alignment Map', 'Course Enrollment'. Row 2: 'Other Documents', 'Sampling Plans', 'LOADs Report', 'General Report'. Row 3: 'Calendar Schedule', 'Analytics', 'Contact Support', 'AMEE Lab'. Row 4: (empty). At the bottom of the form is a blue 'Save' button.

Follow the on-screen prompts to complete the details

Choose the permission level and save.

Step 10**Contact Support**

Submit a Support Request Click “Contact Support” to open the support form.

The screenshot shows the AMEE Flow application interface. On the left, there is a sidebar with a user profile for 'Sakile Camara - Project Manager' and a 'MAIN NAVIGATION' section containing links like 'Main Workspace', 'Role Assignments', 'Planning Documents', 'Team Reports', 'Prof. Development', 'Analytics', 'Guest Access', and 'Contact Support'. The 'Contact Support' link is highlighted with a red box. The main content area has a title 'Contact Support' and a sub-instruction 'Click the ticket ID number to read messages'. On the far right, there is a 'Create your support ticket' button. A large red arrow points from the 'Contact Support' link in the sidebar to the 'Create your support ticket' button. To the right of the main content area, there is a red bracket grouping the 'Type of Support' dropdown and the 'Message' rich text area.

Complete the Form

Provide a clear description of the issue or question.

Include your project name or task reference if applicable.

Attach screenshots or files to help us better assist you.

Click Submit Now to send your request.

TOOL TIP: For urgent matters, add this language at the beginning of your message to indicate priority (e.g., “URGENT – Login Issue”).

Step 11**How to Edit System Emails****Access Editable Emails**

Within the **System Settings**, you will find two customizable system emails:

- The **Welcome Email** sent to new users assigned to your team
- The **Project Assignment Email** sent when users are added to a project

Click on each email title to edit the content as needed.

Email Templates

These email templates are automatically sent when users are added to your team.

#	Purpose	Subject	Action
1	Assigned a Project	You've been assigned a project in AMEE Flow	Edit
2	Welcome Email for Assignee Role	You're Invited to AMEE Flow – Access Your Project Dashboard Today	Edit

WARNING: If you choose to edit this template, please ensure that the bracketed placeholders (e.g., {Name}, {Role}) remain unchanged. Modifying or removing these placeholders may result in an error when the email is generated

Subject *
You've been assigned a project in AMEE Flow

Message *

Dear [assignerName],

Welcome to **AMEE Flow**, a new project management platform! This solution is designed to streamline processes and enhance efficiency. You have been assigned the role of [nameofRole]. As part of this role, any tasks assigned to you will be delivered through the AMEE Flow project management system by Dr. Sakile K. Camara.

No login is required if you are an approver or reviewer; you can complete your tasks by responding directly from your email notifications.

If you have any questions or require additional support, please contact [nameofAssignee], your designated [nameofRole].

We look forward to working with you and supporting your efforts in advancing meaningful assessment and continuous improvement.

Update

Edit with Caution**Important Note:**

Do **not** alter or delete any content within brackets (e.g., {UserName}, {ProjectName}), as these placeholders are linked to system-generated data. Changing them may cause errors in your emails.