AMEE FLOW
Balancing Energy, Workload, and Efficiency

Quick Reference Guide: Area Experts

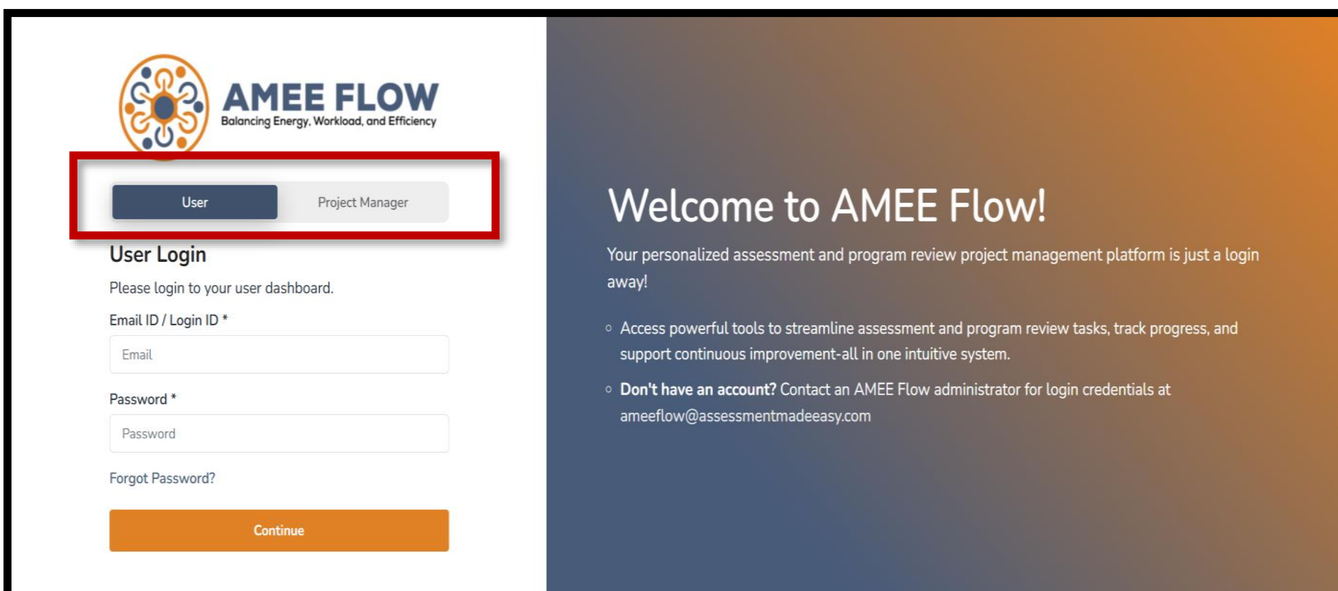
Framework for Leaders Organizing Workflows

This guide outlines the essential steps in following the project tasks you've been assigned in the AMEE Flow platform.

How to Log in to AMEE Flow

You have **two login options** for accessing your AMEE Flow dashboard:

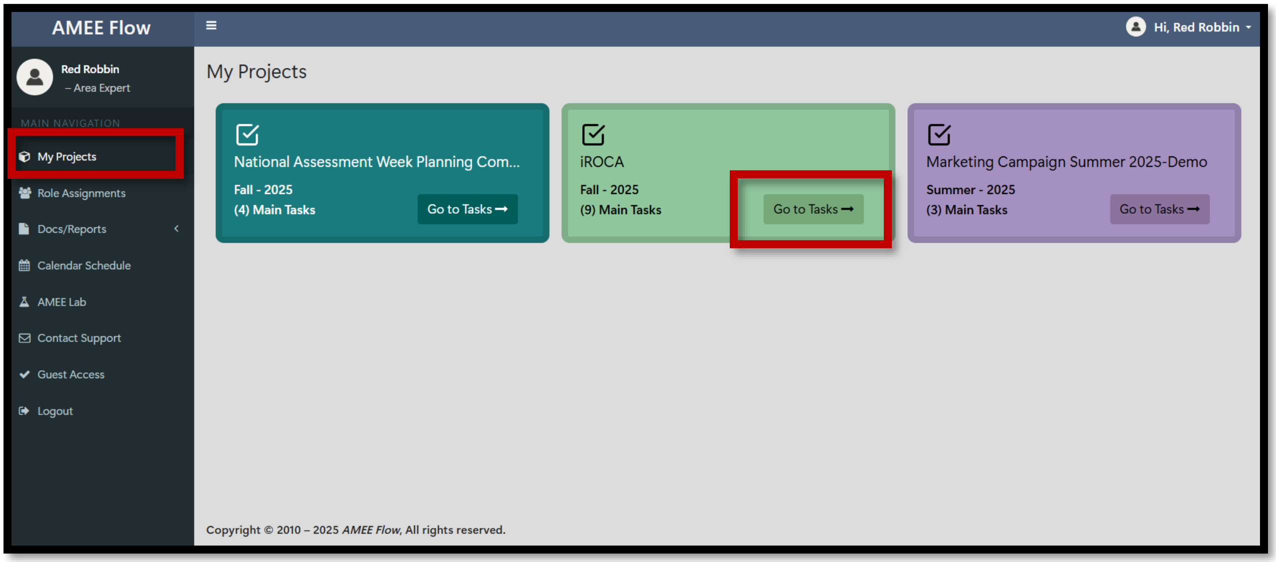
1. **Use your Email Address** *(the one the invitation was sent to)*
   OR
   Use your Unique Login ID *(provided in your welcome email)*
2. **On the Login Page**
   - Click the **User** tab to begin.
   - Enter your chosen login (email or ID) and password.
   - You can change your password after logging in for the first time.
3. **Check Your Inbox for Credentials**
   - Look for an email from AMEE Flow with your login details.
   - Can't find it? Be sure to check your **spam** or **junk** folder.



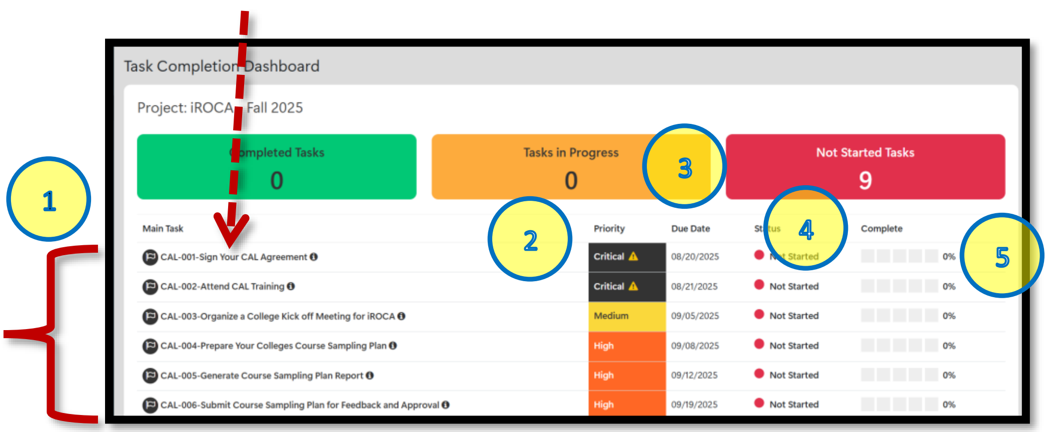
TOOL TIP: Save your login credentials in a secure place for future use.

Step 1 Find Assigned Projects

- Go to **Main Navigation** menu → click **My Projects**
- Click the "**Go to Task**" button on the project card on the project you have been assigned to.



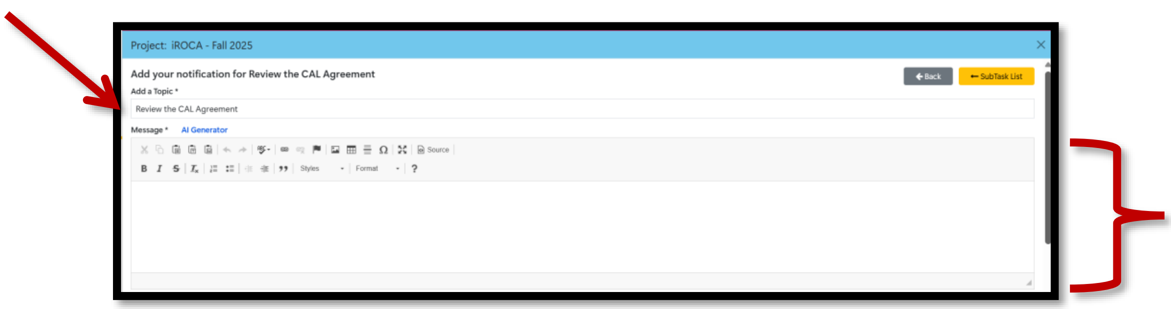
- Review all (1) tasks in the first column, (2) their priority, (3) due date, (4) status, and (5) completion bar in the columns to the right of the tasks.
- The green, yellow, and red legend indicates the number of tasks completed, in progress, and not started.
- Click on a **Main task** to review the details



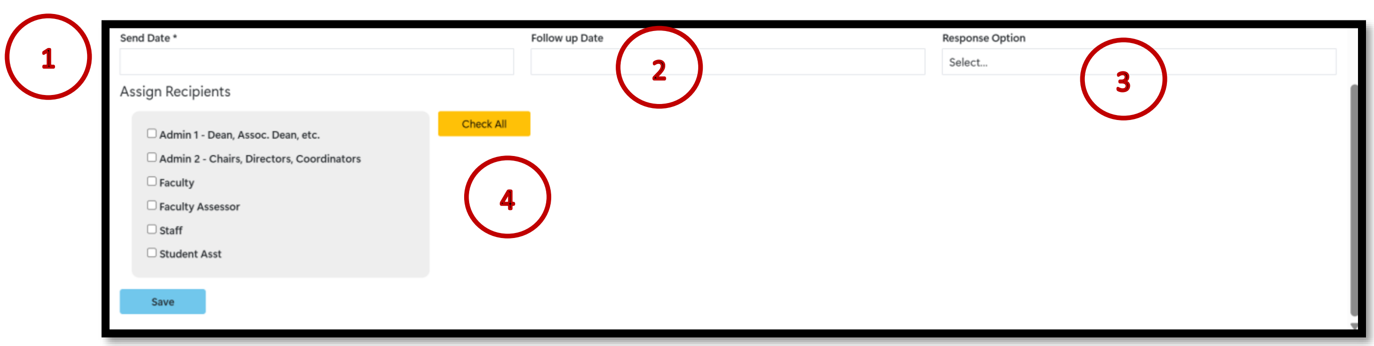
Details include the (1) **due date**, (2) a **description of the task**, (3) **subtasks**, (4) a **status bar**, (5) a trigger **notification reminder**, and (6) **relevant attachments or links**.

TOOL TIP: Some tasks require you to engage with others. If this is the case, click the notification button and create your notification.

a. Add a topic
b. Create your message. Use the AI generator to assist you if necessary

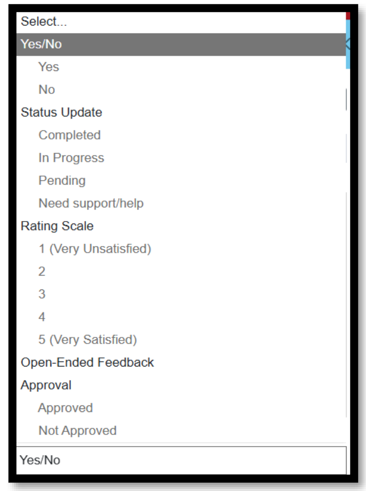


c. Complete the notification by (1) selecting a send date, (2) adding a reminder follow-up date, and (3) providing a response option if needed; then (4) assigning recipients and save.



IMPORTANT NOTE: Assign a role to potential team members before creating a notification.

- There are five response options:
    - Yes/No
    - Status update
    - Satisfactory rating scale
    - Open-ended text box
    - Approval



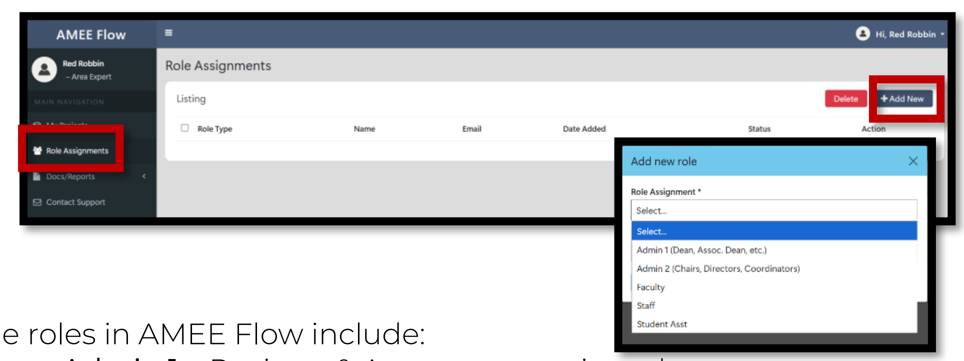
TOOL TIP: If you select the "Response Required" option, be sure to include clear instructions in the notification message field.

For example:
"Please review the attached sampling plan and click the link below to provide your feedback in the comments section by Friday, October 18."

This ensures recipients know exactly what action is expected

Step 2 Pre-Load Your Team to Assign Recipients

- Preload your team before sending notifications.
- Go to Role Assignments → Click Add New, then add details for each team member, including Name, Email, , Assigned Role



- The roles in AMEE Flow include:
    - Admin 1 – Reviews & Approves certain task
    - Admin 2 – Reviews/Provide Feedback
    - Faculty-Provide feedback/review content
    - Faculty Assessors-automatically added from sampling schedule
    - Staff/Colleague-may provide feedback or review content
    - Student Assistant-may provide feedback or review content

NOTE: None of these assigned roles will log in to AMEE Flow. All responses needed can be supplied from the email they receive.

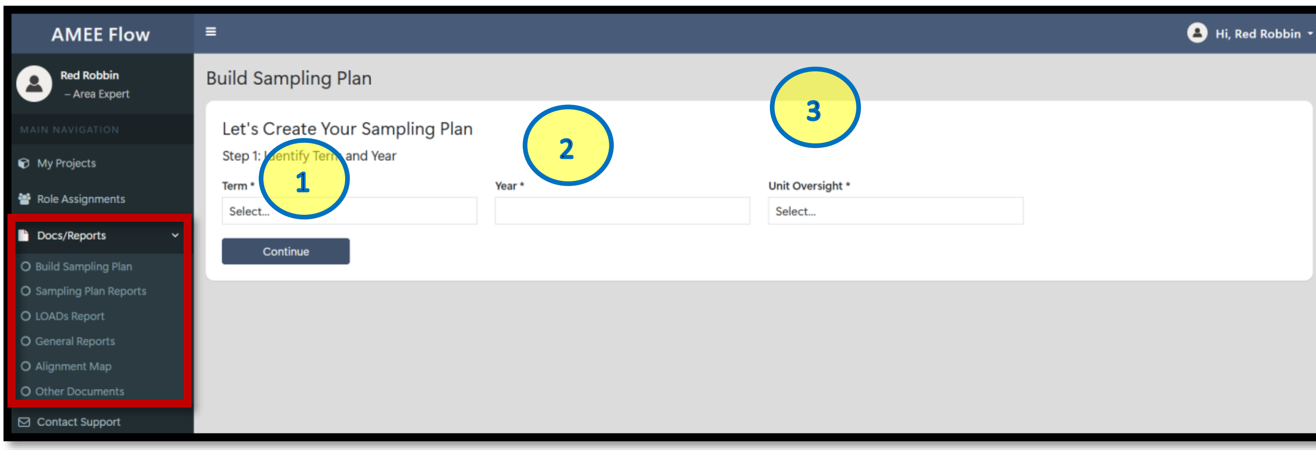
Step 3 Plan, Report, and Access Documents Workspace

This workspace serves as the centralized hub for building, managing, and accessing all critical assessment planning materials and reports.

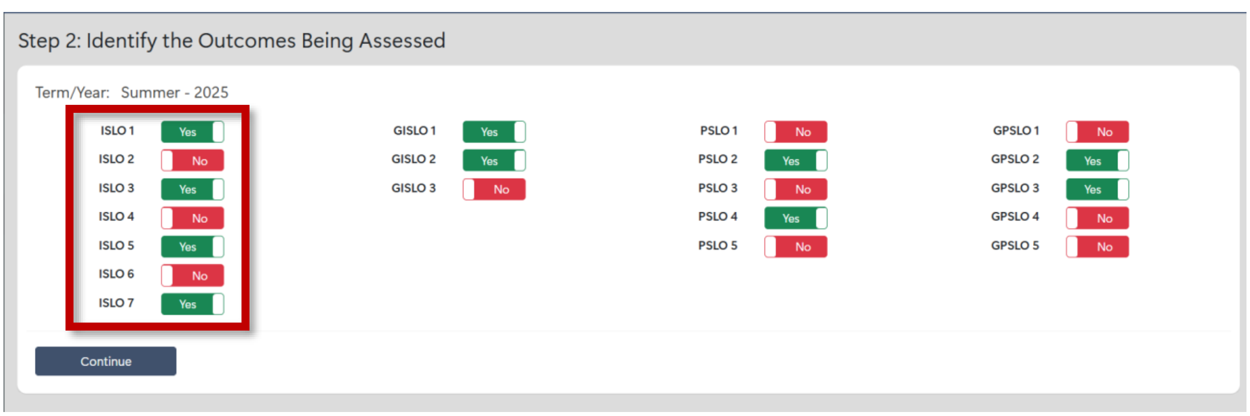
Within this area, if access is provided, users can (A) **build a course sampling plan**, (B) **generate three different reports**, (C) **view the master alignment map**, and (D) **access project-related support documents**.

A Build Sampling Plan

- Go to your Docs/Reports
- Select **Build Sampling Plan** and add the Term, Year, and Oversight Unit and click continue



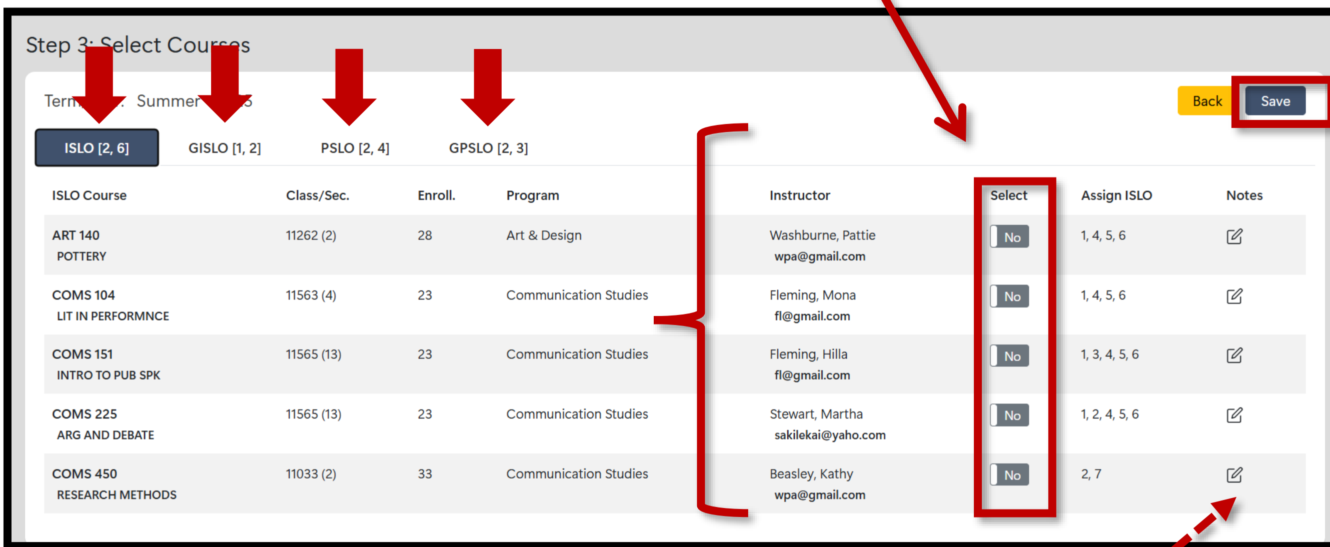
STAGE 1: **Select Outcomes**-Select all outcomes being assessed and click continue



NOTE: Once you've selected all relevant outcomes, the aligned courses will automatically populate into a schedule of courses.

STAGE 2: Select Courses-Select courses from each outcome tab. Then click save in the upper right-hand corner.

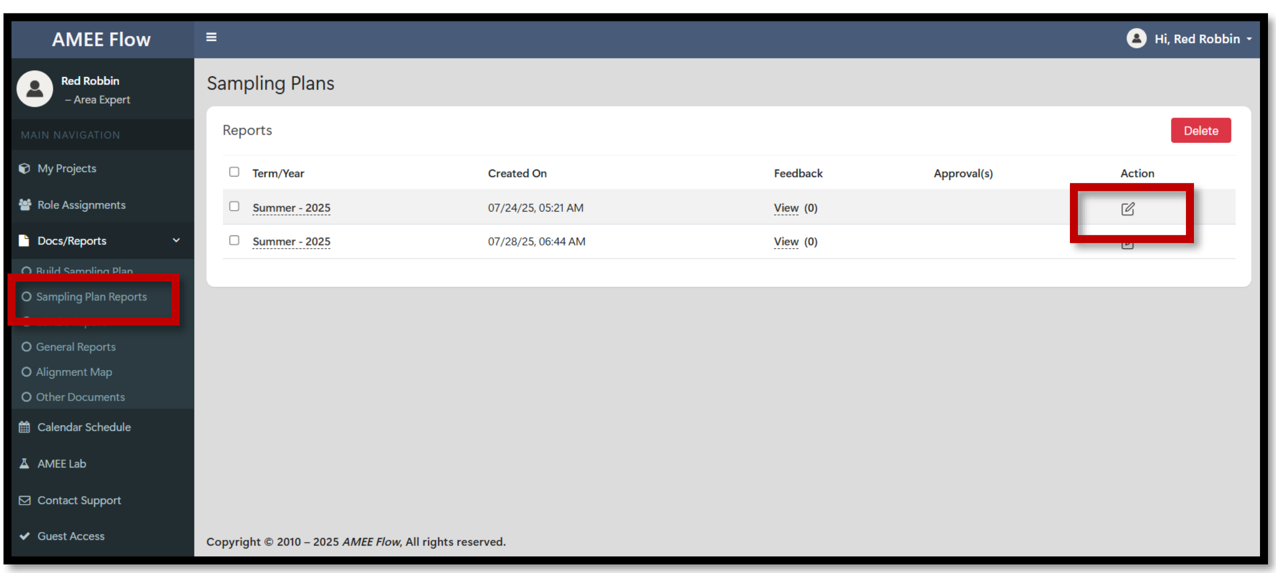
- Once you save your selections, you are automatically creating your sampling plan report.



IMPORTANT NOTE: If you encounter any discrepancies, please leave a note for your project manager by clicking the pencil icon

Editing Schedule of Courses

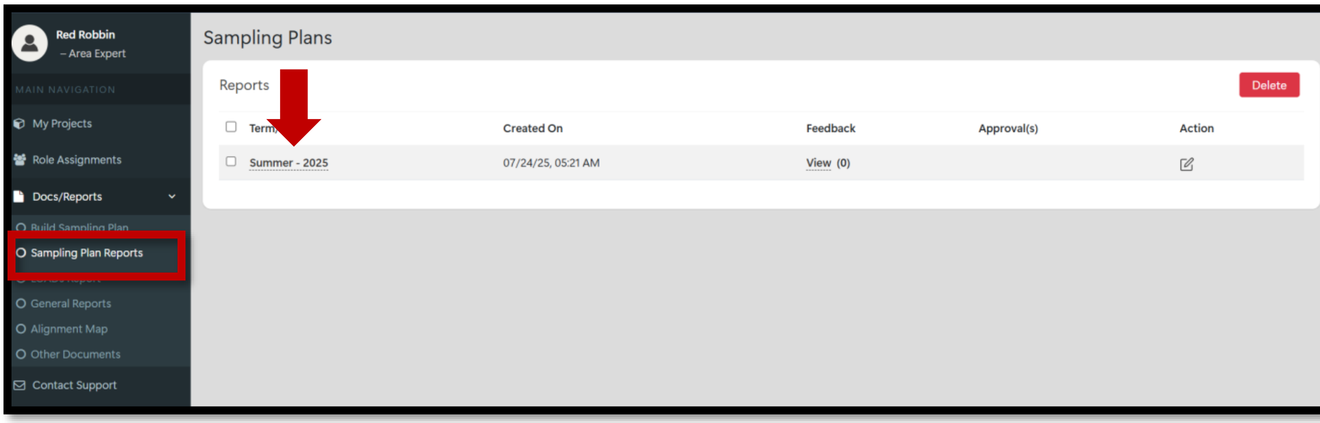
Click Sampling Plan Reports from the left menu, then click on the pencil in the Action column to select courses aligned with the outcomes.



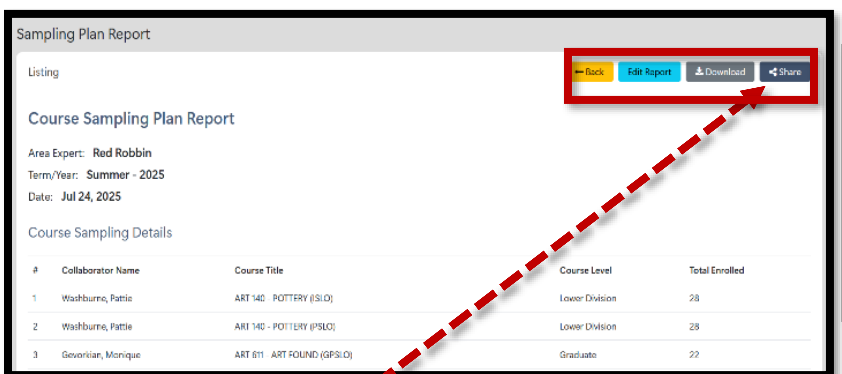
B Generating Reports in AMEE Flow

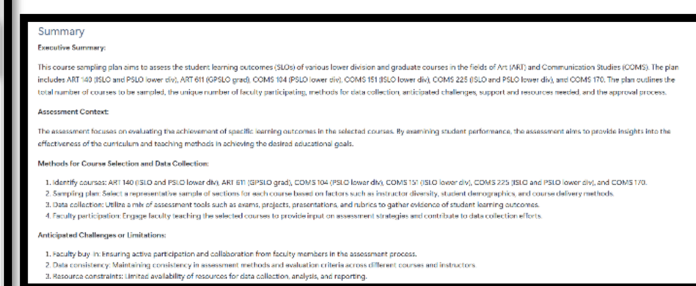
B1

- Go to your Docs/Reports. Available reports will be listed.
- **Sampling Plan Report-** Select the **sampling plan report** from the left menu and click the term and year.

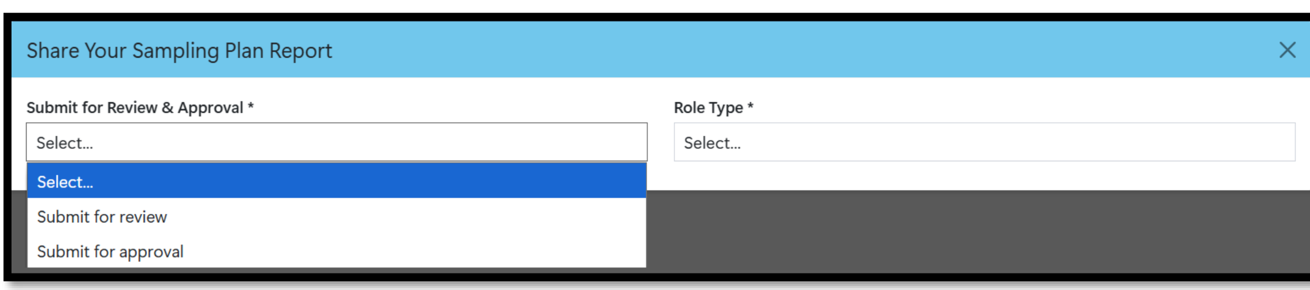


- Click the action buttons at the top to **edit**, **download**, or **share** the report





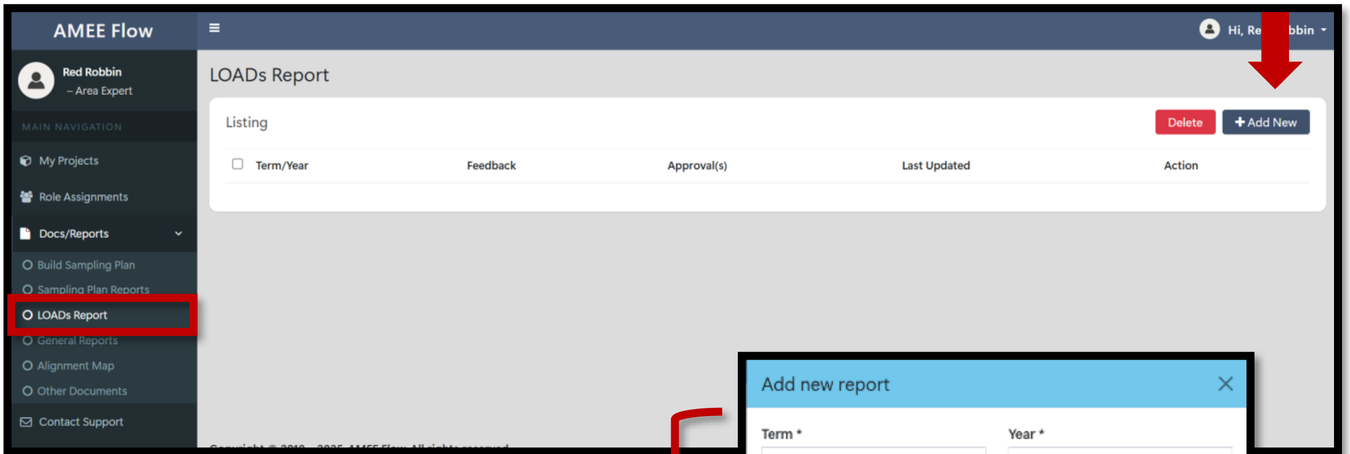
- The **share button** allows you to submit the plan for review or approval. Just select the role type. An editable automated message will appear. Edit as needed, select the recipients, and send it.

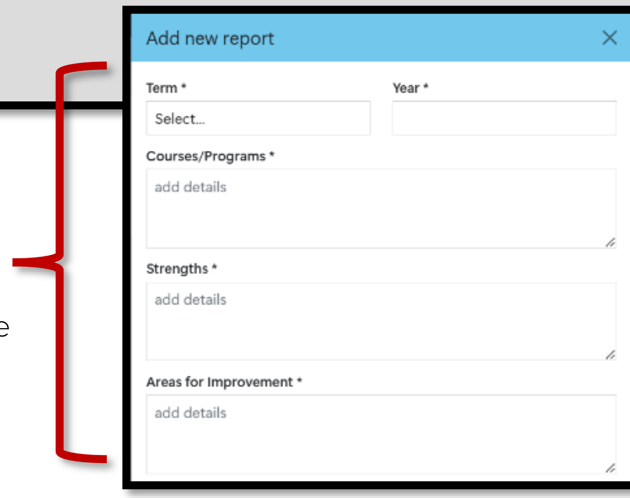


B2

How to Create a Learning Outcomes Assessment Data Report

- Select the LOADs Report from the left menu and click the "add new" button.





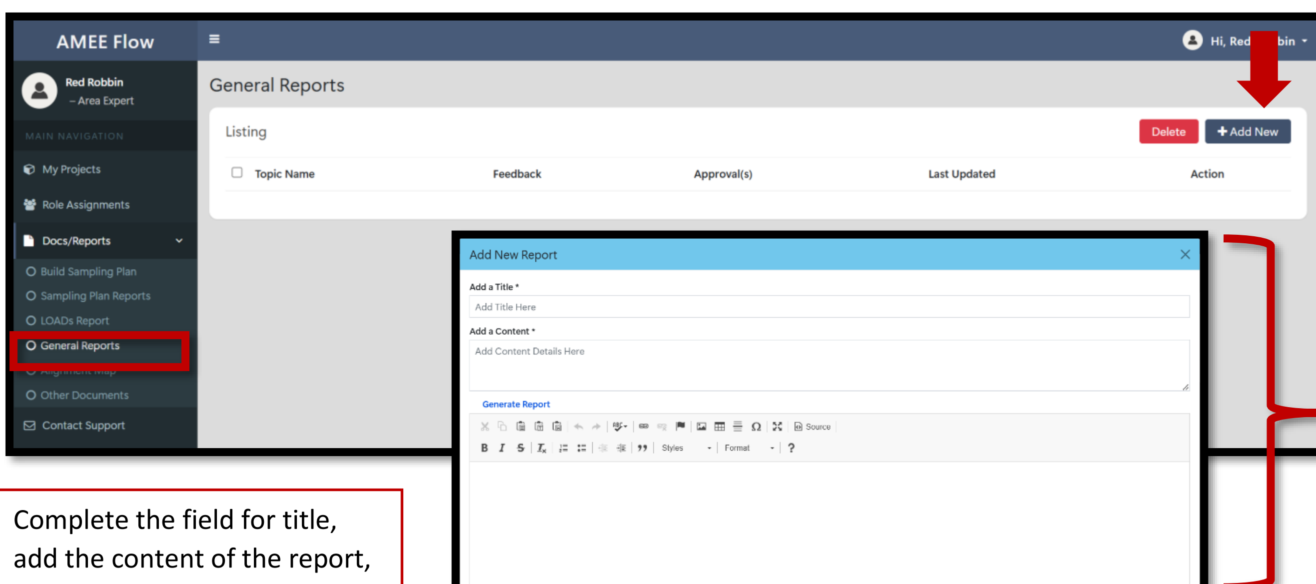
Follow the prompts to complete the fields. AI will assist in creating the report.

You may also edit, download, and share the Report. Follow instructions on page 7.

B3

How to Create a General Report in AMEE Flow

- Click on General Report from the left menu and click Add New.

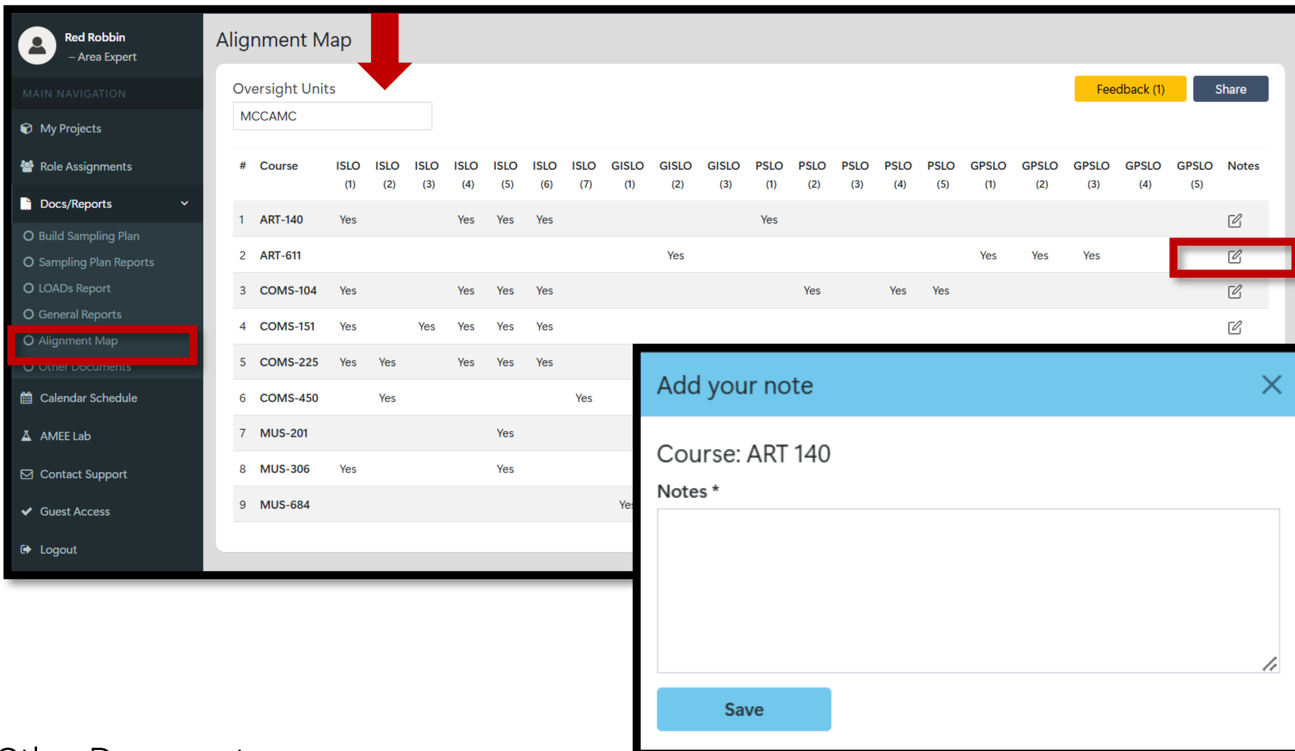


Complete the field for title, add the content of the report, and select Generate report.

C

Accessing Your Campuses' Alignment Map in AMEE Flow

- Go to your Docs/Reports
- Select the **alignment map** from the left menu
- Use the oversight unit dropdown box to find your unit and review the master alignment map.
- If there is a discrepancy, leave a note for your project manager by selecting the pencil next to each course. Then click save to publish your note.



D

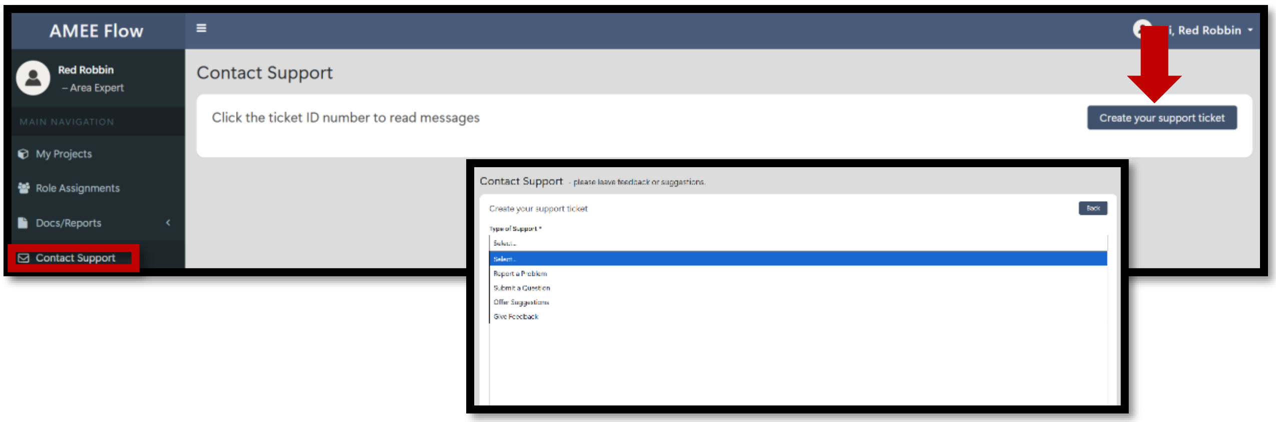
Other Documents

- Go to your Docs/Reports
- Select **other documents** from the left menu
- View the list of resources associated with this project.

Step 4

Contact Support

- Go to **Main Navigation** on the left side
- Select contact support
- Select "**create your support ticket**" to get help.

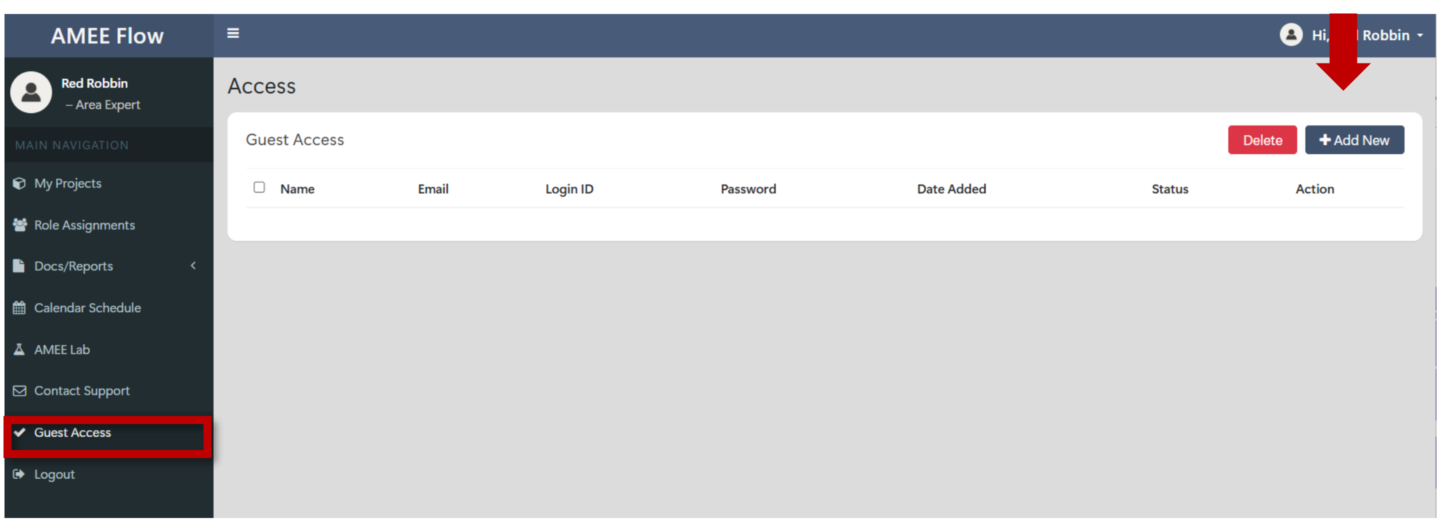


Select the type of support needed, write a detailed message, and send..

How to Grant Access to Your Dashboard

Follow these steps to invite a collaborator as a guest user in AMEE Flow:

1. **Navigate to Guest Access:**
   - From the **Main Navigation Panel** (left-hand side), click on **Guest Access**.
2. **Add a New Guest:**
   - Select **Add New** in the Guest Access section.



3. **Complete Guest Information:**
    - Enter the guest's **full name** and **email address**.

IMPORTANT NOTE: Access Level-Guests will have **view and edit access** to your dashboard, which is **outside your authority**. Only invite guests whom you trust to view and manage the same content you do.

4. **Send Invite:**
    - Click **Send**. The guest will receive an email with login credentials and instructions.

Reminder:
For security and compliance, avoid sharing sensitive documents or reports unless you are certain the guest has appropriate clearance.