AMEE FLOW
Balancing Energy, Workload, and Efficiency

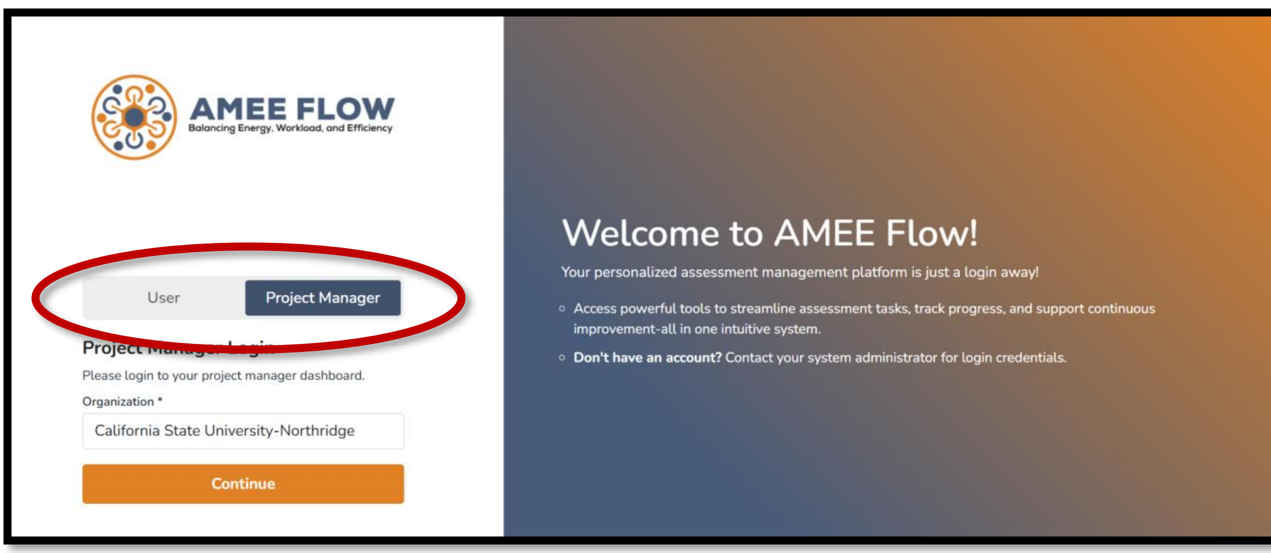
Quick Reference Guide: Project Managers

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.

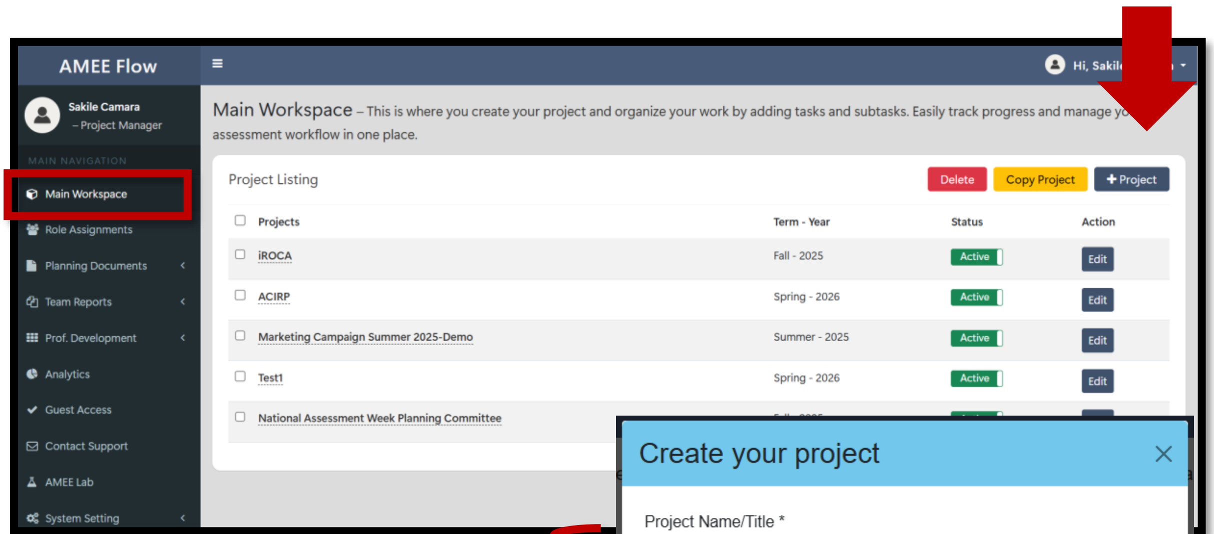
Login and Account Access

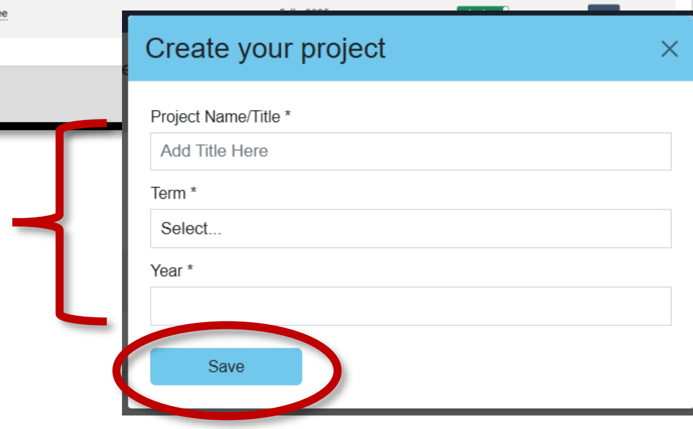
- Use the credentials sent to your email after your organization account is created.
- Log in via the Project Manager tab, select your organization, and change your password if needed.
- Check your spam/junk folders if the email doesn't appear with your login credentials.



Step 1 Creating a New Project

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



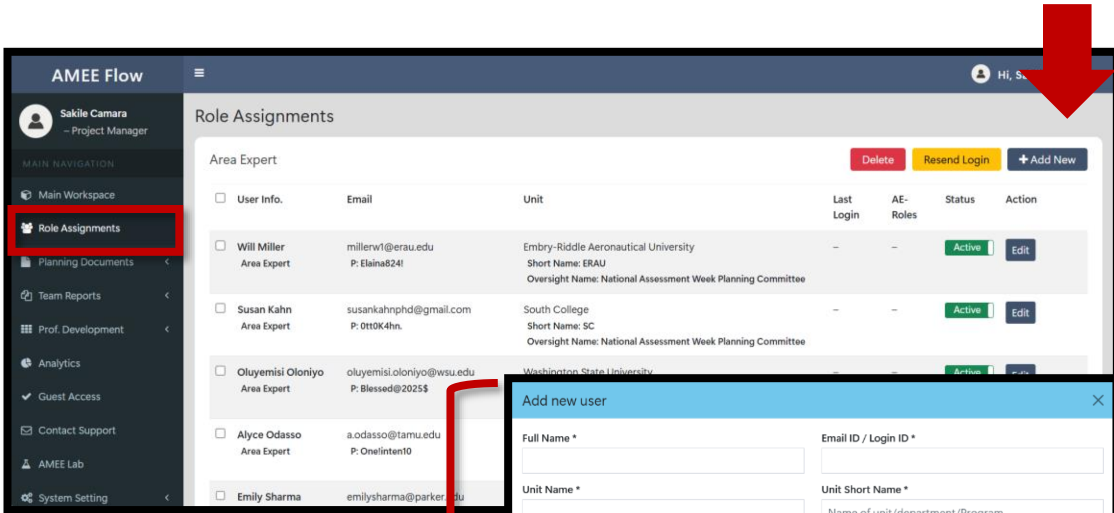


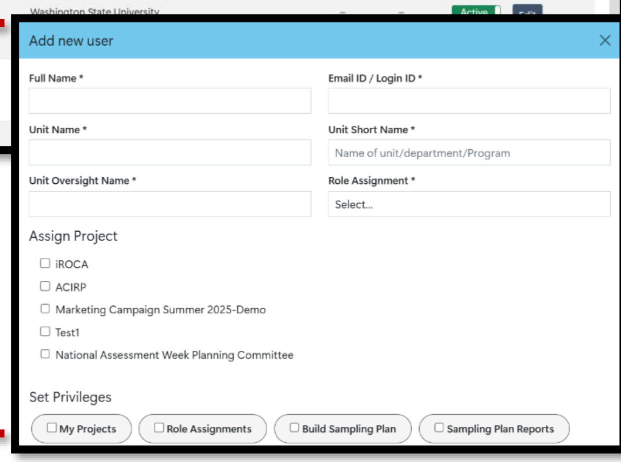
TOOL TIP Once your project has been created, you may choose to **copy** it for reuse or **delete** it if no longer needed by clicking the appropriate action buttons.

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/Approver – 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.

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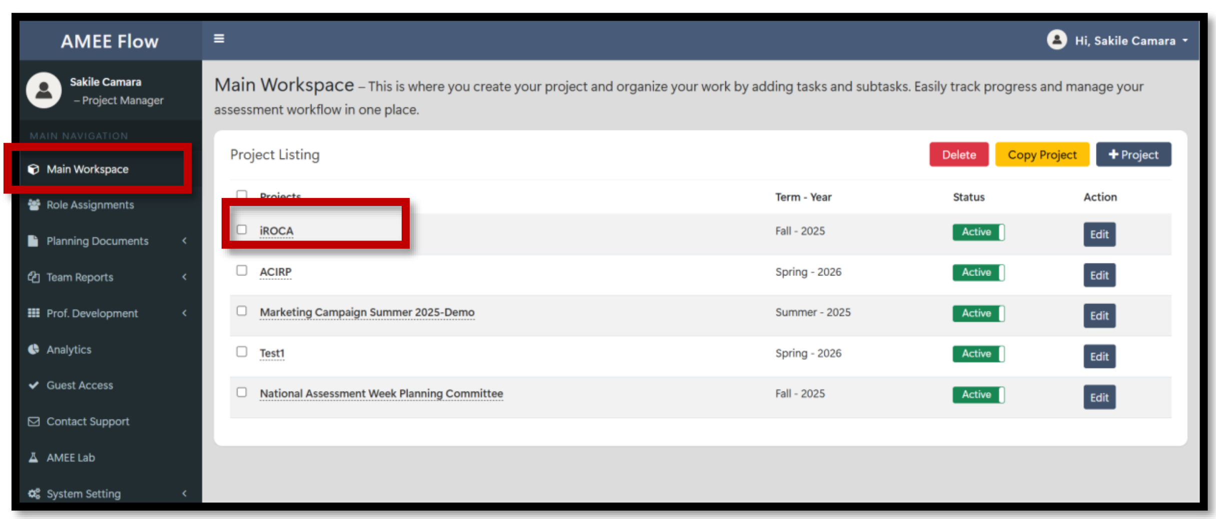
Tooltip: When a role is assigned to a user, they'll automatically receive an email with login instructions specific to that role. You can resend login credentials at any time or remove the role if it's no longer needed.

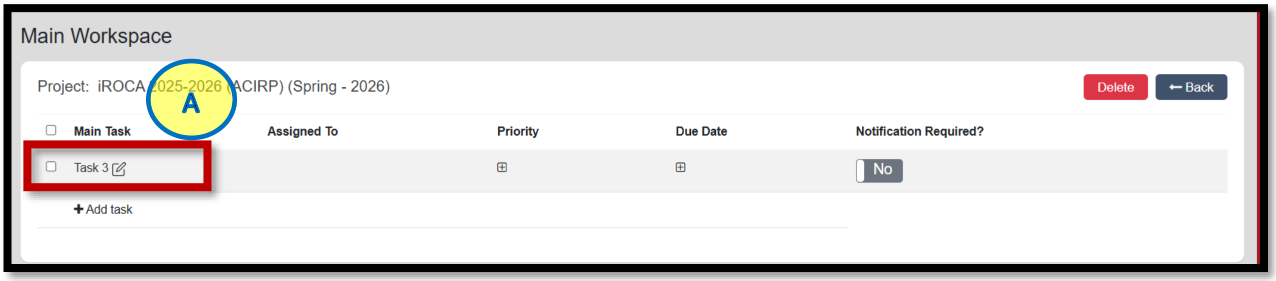
Now go back to the MAIN WORKSPACE tab and click on the project name to start creating and managing your tasks.

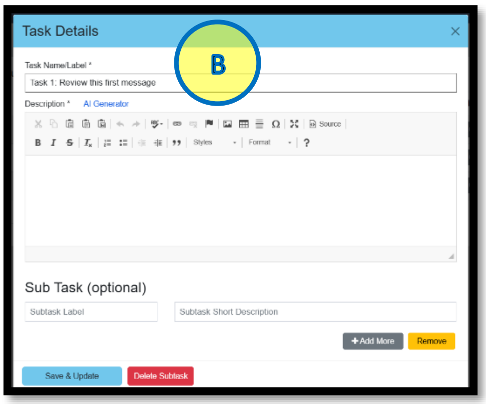


Step 3

Create and Manage Tasks

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





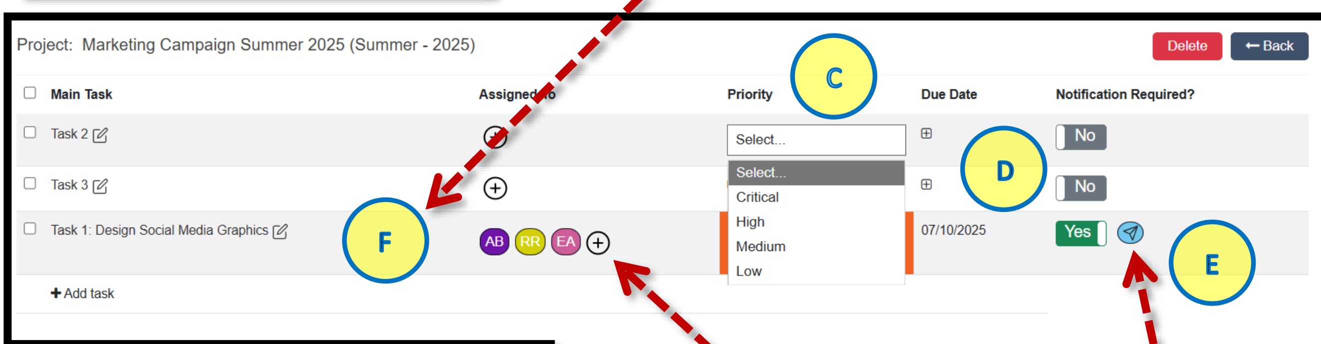
B. Write the main task description
   1. Use the AI Generator to reduce the writing burden
   2. Add subtasks related to the main task

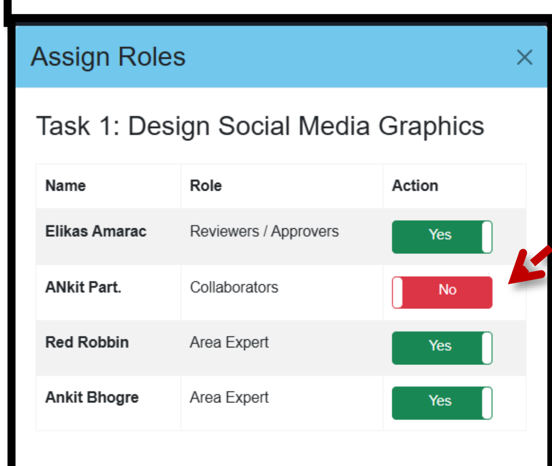
C. Assign each task a priority status

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.





F. To add a team member to a task

- click the **Plus** button and
- **slide the toggle button** to yes to add a member.

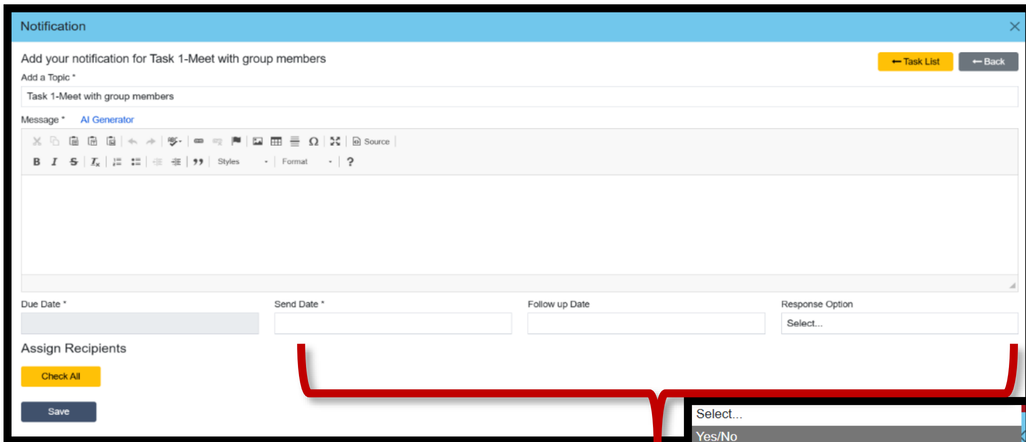
Then click **Save and Update**.

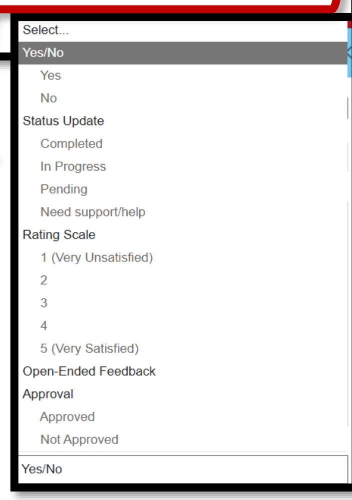
> TOOL TIP: After assigning a role, click the **blue airplane icon** to create and send a customized notification to the selected recipients.

Step 4

Sending Notifications

- After clicking the notification button, follow these steps:
  1. Enter the title and the content you want the recipient to receive.
     - Use the AI Generator to assist you.
  2. Add a "**send** "notification date, a **follow-up** notification date (if needed), and a response option (if a response to the notification is required).



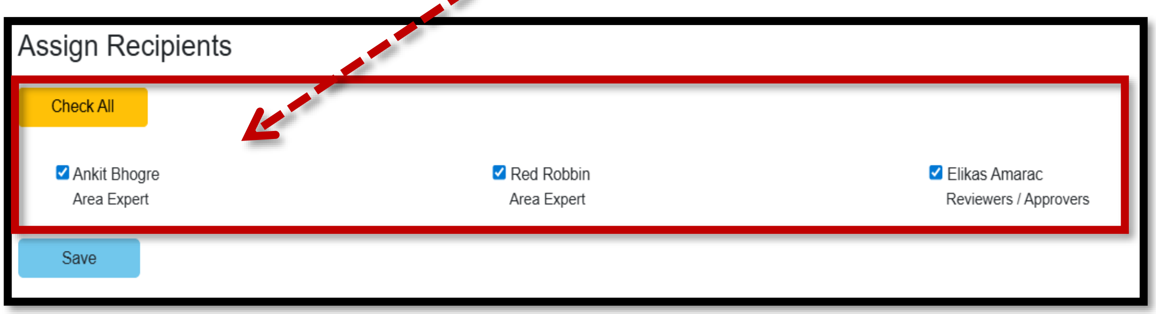


There are five response options:

a. Yes/No
b. Status update
c. Satisfactory rating scale
d. Open-ended text box
e. 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.

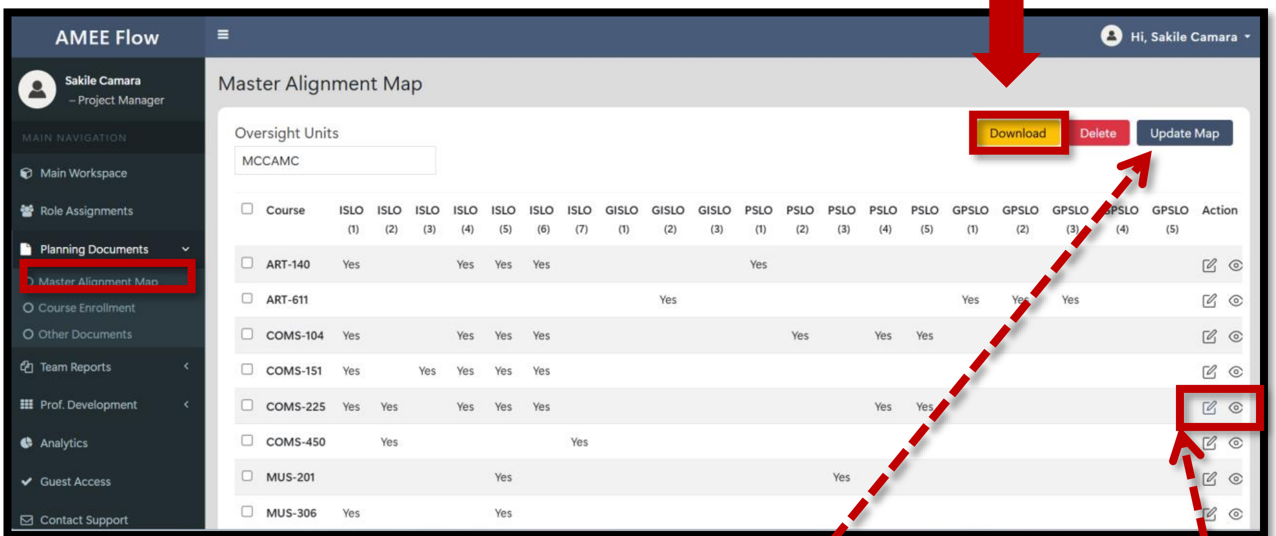


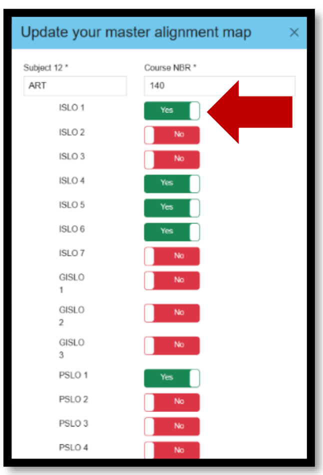
Step 5

Planning Documents

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

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





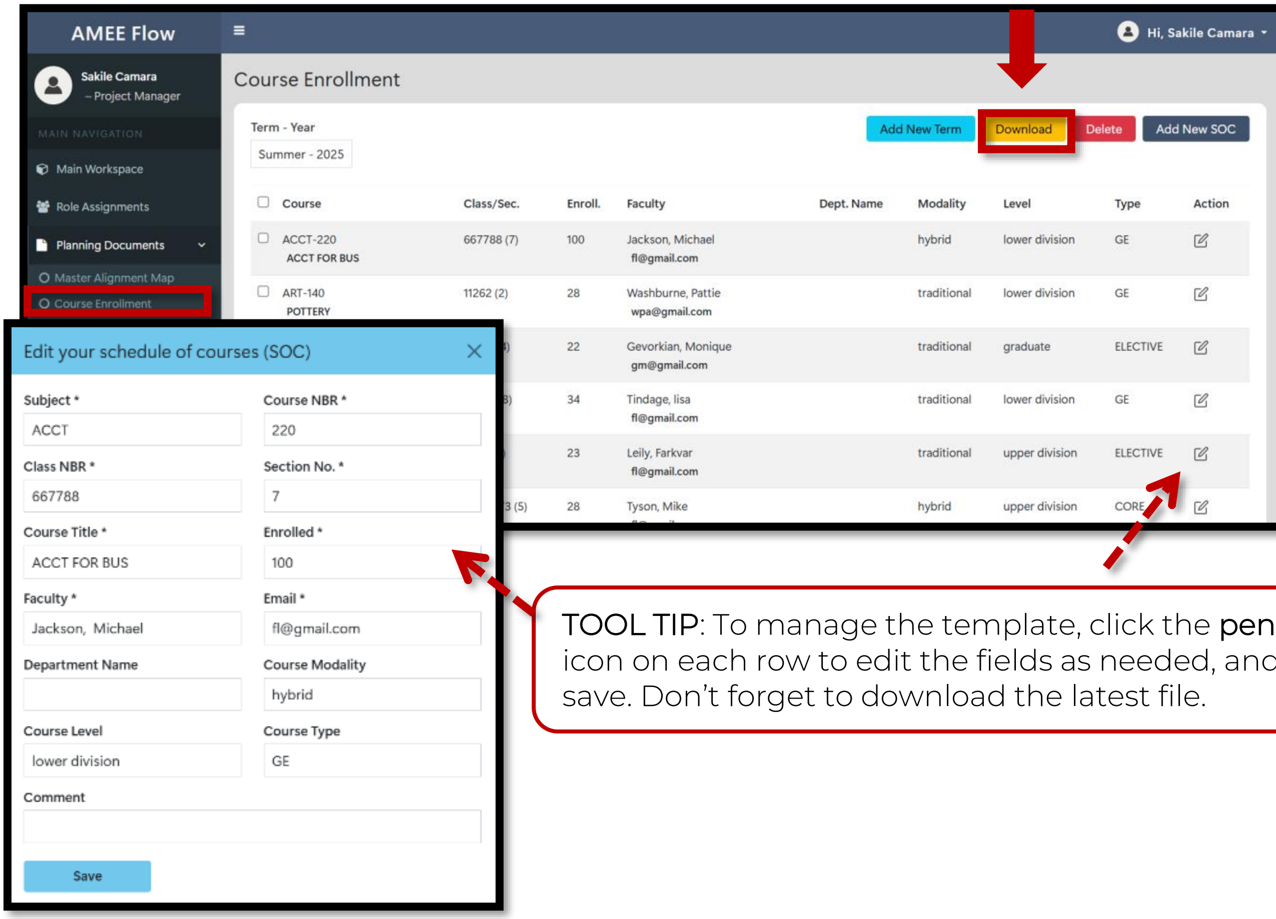
2. Click the **Update Map** button to upload the completed template to manage the fields.
3. Use the **pencil icon** to edit the row. Simply, move the toggle button to align the course to the outcome.
4. Click the **eye icon** to see feedback on the alignment map.

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.

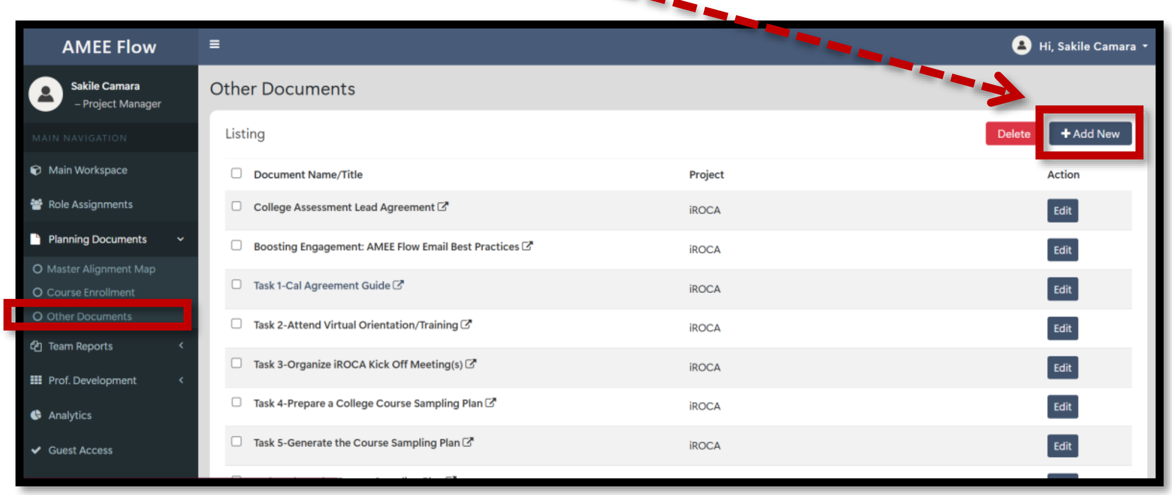
5B Document 2-Course Enrollment AKA (Schedule of Courses)

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

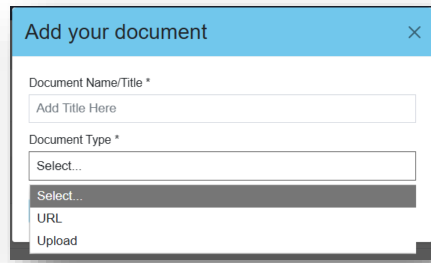


TOOL TIP: To manage the template, click the **pencil** icon on each row to edit the fields as needed, and then save. Don't forget to download the latest file.

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



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.

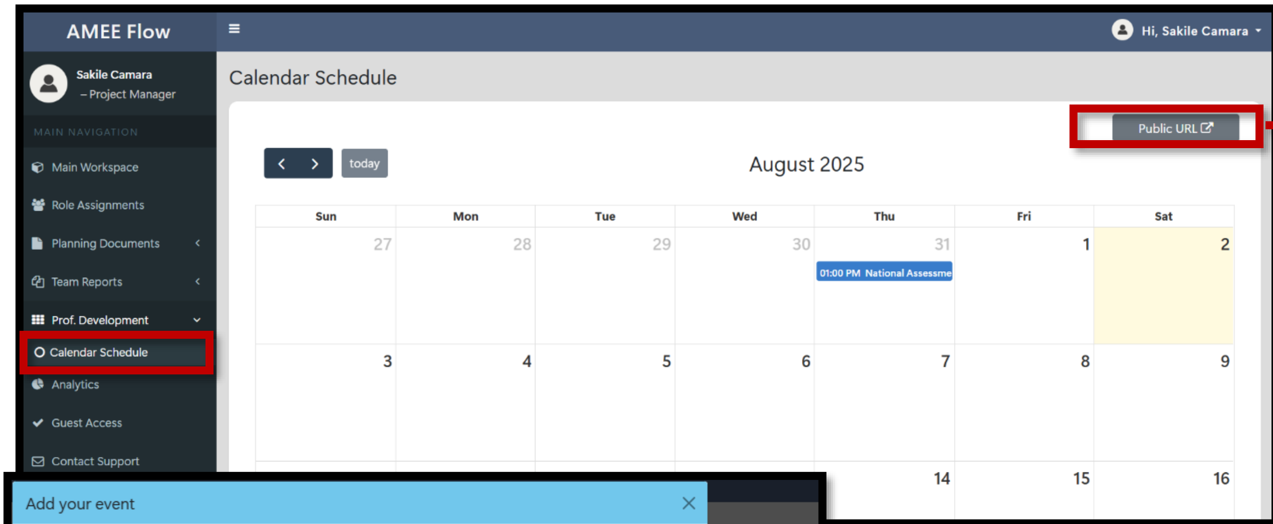
To view submitted reports, select the type of report you want to see and click on the name of the report to view it.

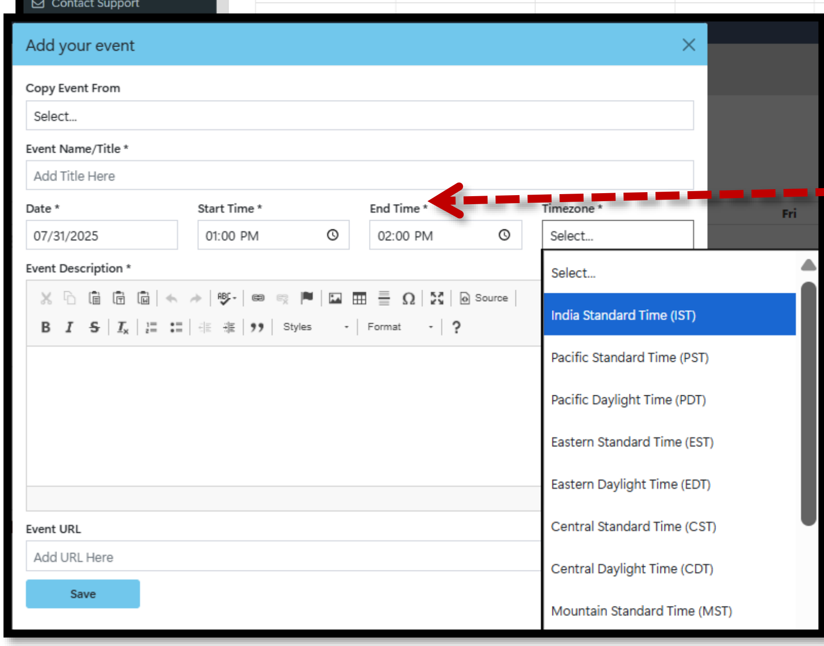
TOOL TIP: If feedback has been provided, click "View" to access it. All approvals can be reviewed in the last column for easy reference.

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.





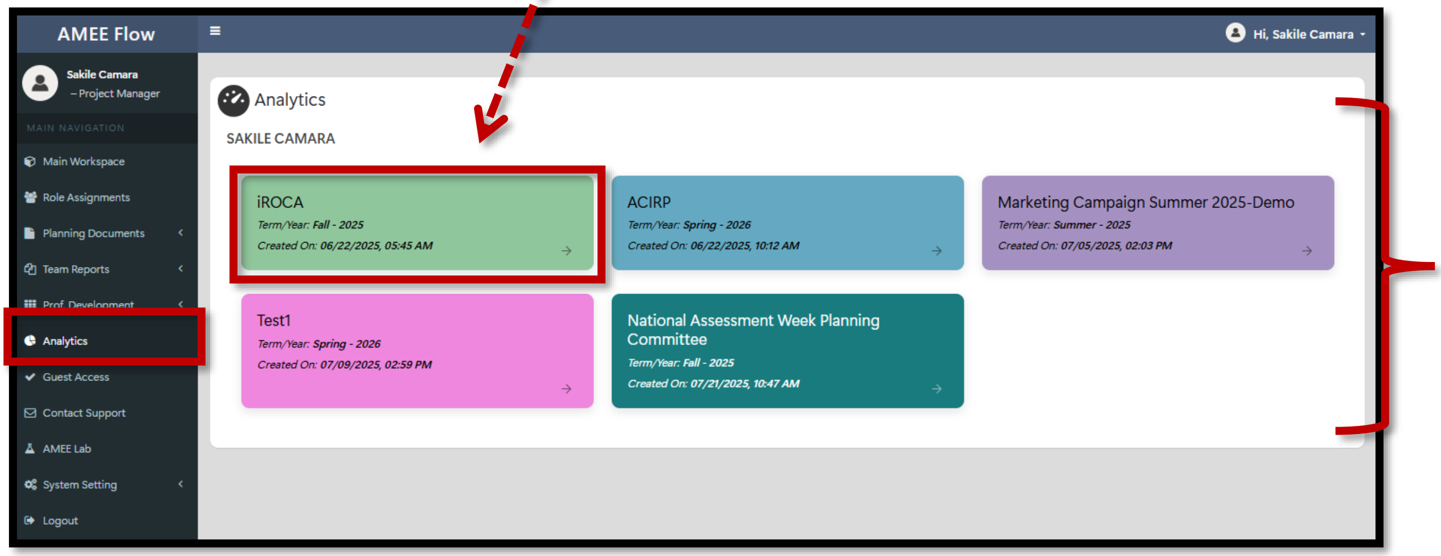
Include:

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

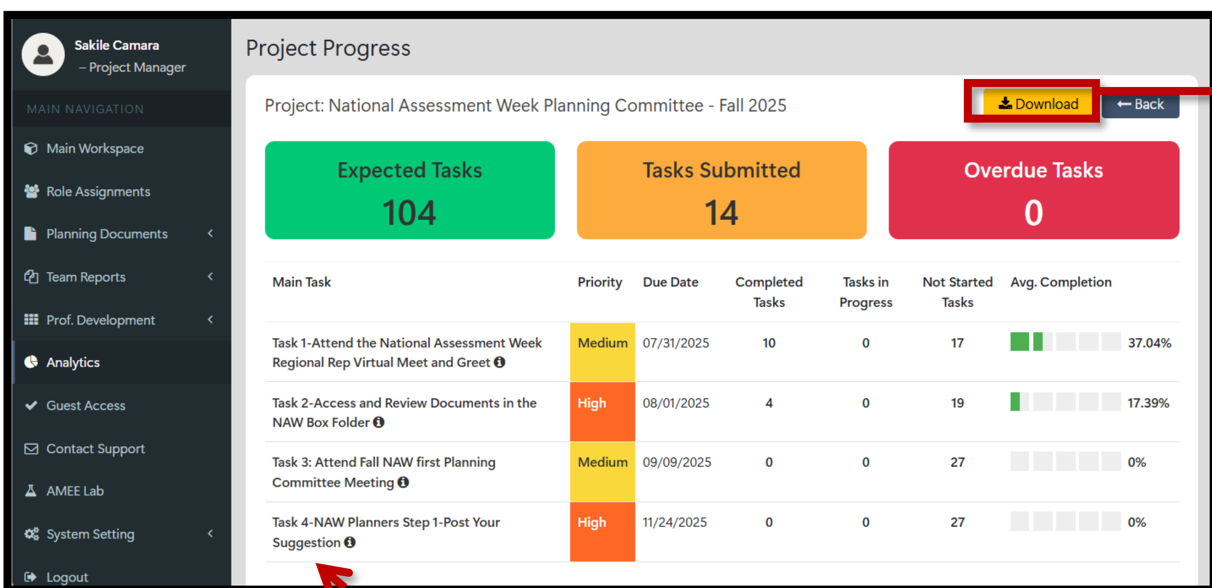
Use the **Public URL** to share the calendar with others.

Step 8 Analytics

Select a project to monitor progress and task completions.



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



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

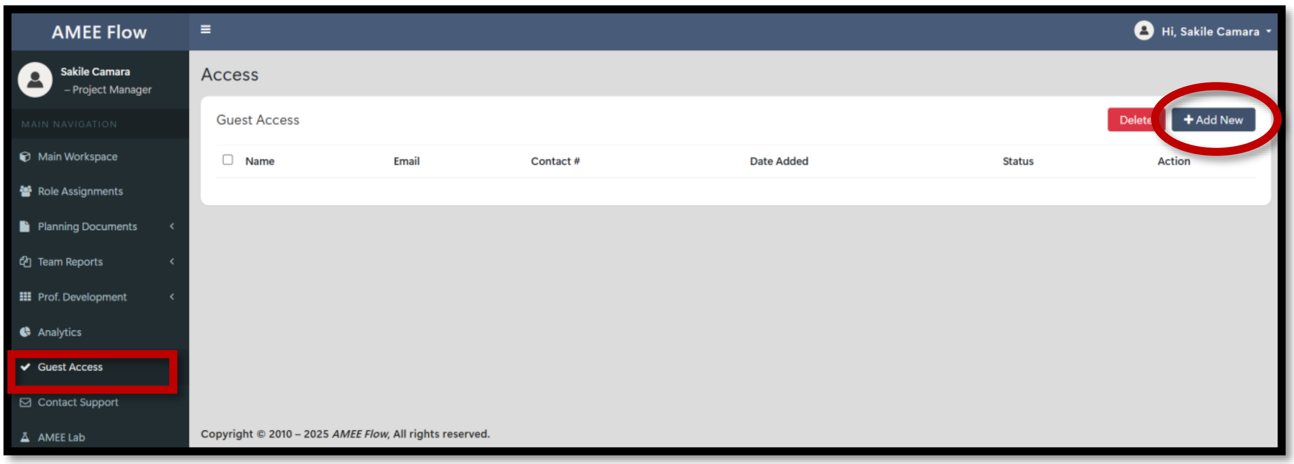
How to Grant Guest Access to Your Project Management Dashboard

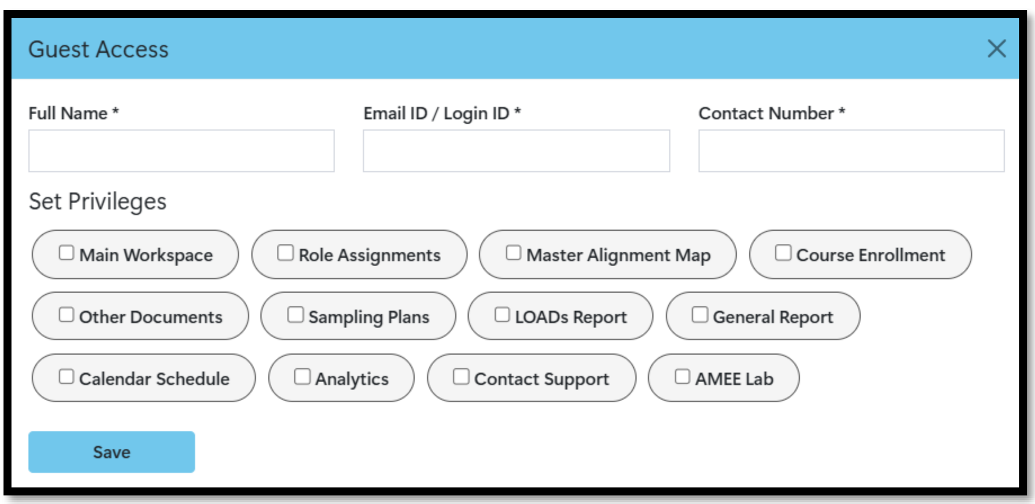
Navigate to Guest Access

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.





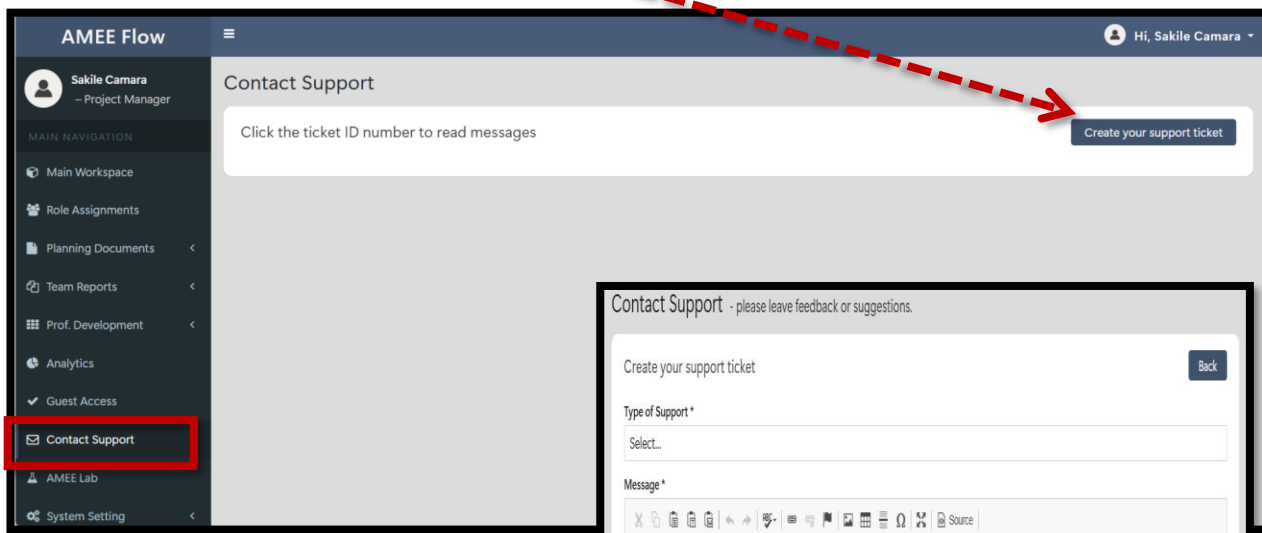
Follow the on-screen prompts to complete the details

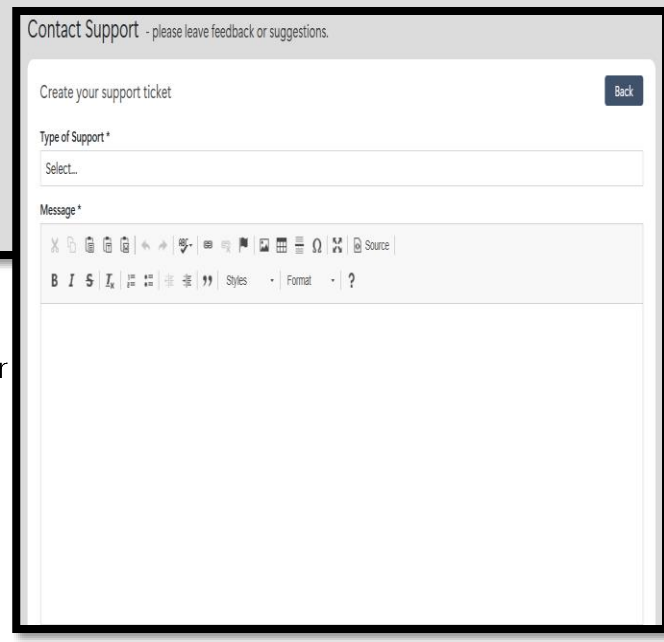
Choose the permission level and save.

Step 10

Contact Support

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





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”).

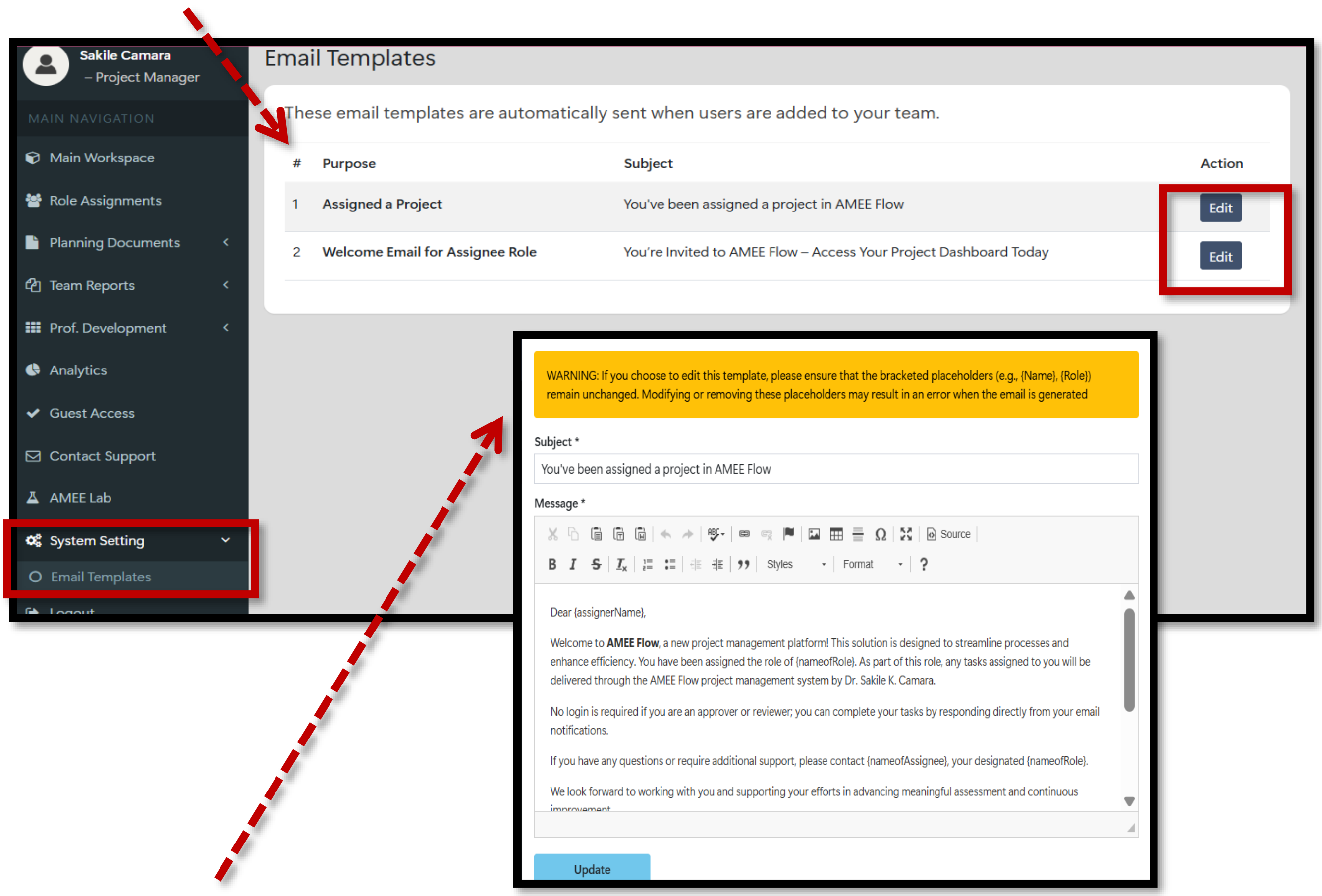
Step 11 How to Edit System Emails

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.



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.