

amc workbrain user guide

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Welcome to the AMC WorkBrain User Guide

In today's fast paced business world, efficient project management and resource allocation are essential. AMC WorkBrain is a cloud based platform that empowers teams to streamline workflows, track time, and generate actionable insights—all from a single interface. This user guide will walk you through every aspect of the software, from initial setup to advanced reporting, so you can harness the full potential of WorkBrain without a steep learning curve.

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1. Overview of AMC WorkBrain

AMC WorkBrain is a comprehensive work management solution designed for consulting firms, law practices, and any organization that needs to manage complex projects, allocate resources efficiently, and maintain accurate time records. Key features include:

- Project & task planning with Gantt charts
- Automated workflow routing and approvals
- Real time resource allocation dashboards
- Detailed time tracking and billing tools
- Customizable reporting and analytics
- Secure data storage with role based access control
- Mobile app for on the go updates

By integrating these functionalities into one platform, AMC WorkBrain reduces administrative overhead, increases transparency, and helps teams deliver projects on time and within budget.

2. Getting Started

2.1 Signing Up for an Account

To begin, visit the **AMC WorkBrain website** and click the “Sign Up” button. You will be prompted to enter your

company's name, email address, and desired password. After verification, you'll receive a confirmation email containing a temporary login link. Use this link to create your administrator profile and set up the initial company settings.

2.2 Understanding the Dashboard

Upon first login, you'll land on the **Dashboard**. This central hub displays:

- Upcoming deadlines and milestones
- Current project status summaries
- Recent activity feed
- Quick links to key features such as Time Tracking and Reports

Take a few minutes to explore each widget. Hover over icons for tooltips that explain their functions.

2.3 Setting Company Preferences

Navigate to **Settings > Company Preferences**. Here you can configure:

1. Currency & Billing Rates – set default currencies and hourly rates per role.
2. Time Zone – ensures all timestamps align with your office location.
3. Notification Rules – choose email or in-app alerts for task assignments, approvals, and overdue items.
4. Data Retention Policies – define how long completed records are stored.

Adjusting these settings early prevents confusion later and keeps your workflows consistent.

3. Installation & Configuration

3.1 Web Portal Setup

AMC WorkBrain is a cloud-based solution, so no local installation is required. However, you'll need to configure your domain and SSL settings if you plan to use a custom subdomain.

- Domain Configuration – add a CNAME record pointing to workbrain.amc.com.
- SSL Certificate – the platform automatically provisions an SSL certificate via Let's Encrypt, but you can upload your own if you have specific compliance needs.

3.2 Integrations

WorkBrain supports several third-party integrations that extend its capabilities:

- Accounting Software – sync time entries with QuickBooks or Xero for automated invoicing.
- CRM Systems – connect to Salesforce to pull client data into projects.
- Communication Tools – integrate Slack or Microsoft Teams for real-time notifications.
- Document Management – link with Google Drive or SharePoint to attach files directly to tasks.

To set up an integration, go to **Settings > Integrations** and follow the step-by-step wizard. Most integrations use OAuth for secure authentication.

4. User Management

4.1 Adding Users

From the **Admin Panel**, select **Users > Add User**. Enter the user's email, role, and department. Roles determine access levels: **Admin**, **Project Manager**, **Team Member**, and **Client**. You can also assign custom roles if your organization requires granular permissions.

4.2 Role Based Access Control

WorkBrain's permission system is built on **role based access control (RBAC)**. Each role comes with default capabilities, but you can modify them by editing the role definition:

1. Navigate to Settings > Roles.
2. Select the role you wish to edit.
3. Toggle permissions for features such as Project Creation, Time Entry, Reporting, and Billing.

Remember to save changes and notify users of any role updates.

4.3 Managing User Groups

User groups allow you to assign multiple users to a single project or workflow automatically. For example, a "Marketing Team" group can be added to all campaigns without adding each member individually. Create groups under **Settings > Groups** and then assign them to projects or tasks.

5. Workflow Management

5.1 Creating Projects

To start a new project, click **Projects > New Project**. Fill in the project name, client, start date, and end date. You can also attach a project template if you have recurring project structures.

5.2 Building Task Lists

Inside a project, you can create tasks, sub tasks, and milestones. Tasks are organized in a hierarchical tree:

- Parent Task – broad activity such as "Design Phase".
- Sub Task – specific deliverables like "Create Wireframes".
- Milestone – critical checkpoints such as "Client Approval".

Drag and drop tasks to reorder them or change their status.

5.3 Automating Approvals

WorkBrain's workflow engine allows you to set up multi step approval chains. For instance, a time entry may require manager approval before it can be billed. Configure this under **Settings > Workflows**:

1. Create a new workflow rule.
2. Define the trigger event (e.g., Time Entry Submitted).
3. Set the approval steps and assign approvers.
4. Choose actions upon approval or rejection (e.g., send email, update status).

5.4 Gantt Charts & Scheduling

The Gantt view gives a visual representation of task timelines. You can:

- Drag bars to adjust start/end dates.
- Set dependencies so that one task cannot start until another finishes.
- View resource allocation to avoid overallocation.

Use the **Auto Schedule** feature to let WorkBrain automatically adjust dates based on dependencies and resource availability.

6. Time Tracking & Billing

6.1 Manual Time Entry

Team members can log hours against tasks by navigating to the **Time Tracker** tab. Each entry requires:

- Project and task selection.
- Start and end times (or duration).
- Optional notes for context.

Entries are stored in a database that can be filtered by date range, user, or project.

6.2 Clock In/Clock Out Functionality

For real time tracking, enable the **Clock In** button in the user profile. When a user clocks in, WorkBrain records the timestamp and associates it with the current task. Clock out stops the timer automatically.

6.3 Auto Time Capture

WorkBrain can capture time automatically if you integrate it with your operating system or browser. For example, when a user opens a project file in Microsoft Office, the platform can log the session. Enable this feature under **Settings > Time Capture**.

6.4 Billing & Invoicing

Once time entries are approved, they can be included in invoices. Use the **Billing** module to generate invoices:

1. Select the client and billing period.
2. Review approved time entries.
3. Apply any discounts or taxes.
4. Generate PDF or send directly via email.

Integration with accounting software ensures that invoiced amounts are automatically posted to your financial ledger.

7. Reporting & Analytics

7.1 Standard Reports

WorkBrain offers a suite of pre built reports, such as:

- Project Status Report
- Resource Utilization Dashboard
- Time by Project Summary
- Profitability Analysis
- Client Billing Overview

Each report can be filtered by date, project, user, or client and exported in CSV, PDF, or Excel format.

7.2 Custom Report Builder

For unique metrics, use the Custom Report Builder. Click **Reports > New Custom Report** and choose:

1. Data source (e.g., Time Entries, Projects).
2. Fields to include (e.g., Hours, Rate, Cost).

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