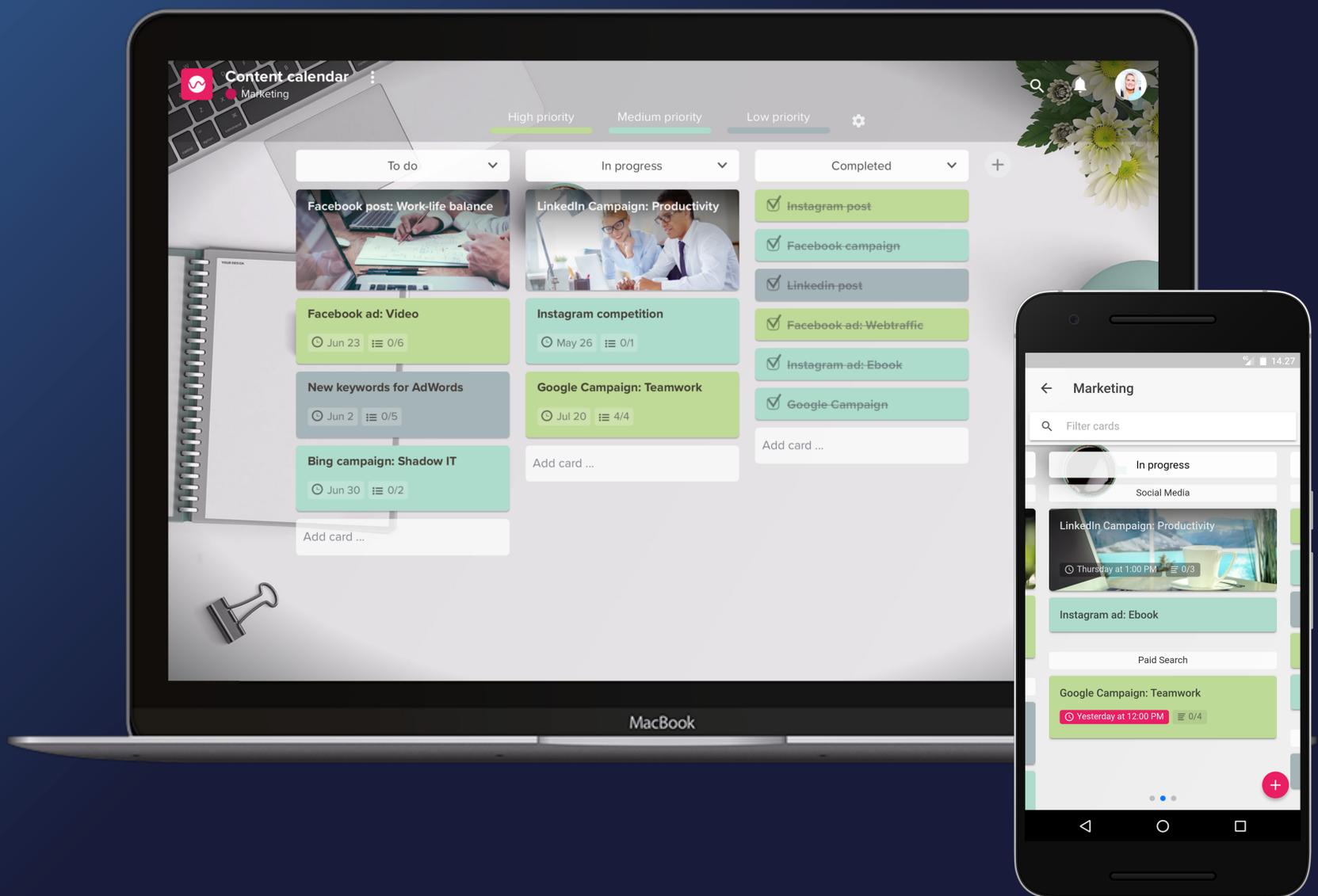


# GET STARTED WITH UPWAVE

## GUIDE FOR ADMINS



# WHAT IS UPWAVE?

Upwave is a cloud-based platform for collaborating on projects, innovation processes and daily tasks.



You can safely invite partners, customers, suppliers and other external users into your Upwave workspace. Your organization owns all the data, and can archive it when a project is completed.

The biggest challenge when adopting a new tool is often varying skillsets and experience within the organization. Upwave is designed to be as intuitive and user-friendly as possible, so that you can get everyone onboard - with no extra training.

Upwave is available on both web and mobile, which makes it easy to get things done both at the office, at home and on the go.

# CREATE WORKSPACE



A workspace is a place where your organization can collaborate on projects and tasks. Inside your Workspace, you can create different teams or departments.

## 1. Go to [www.upwave.io](http://www.upwave.io) and sign up

upwave

Product Pricing Support Blog Your teams

## Get more done together

Upwave is a cloud-based platform for collaborating on projects, innovation processes and daily tasks.

you@company.com **Get started for Free**

## 2. Enter email, name and password

upwave

### Create your Upwave Account

Email  
you@company.com

First name  
Jane

Last name  
Smith

Password  
Password

I accept the [Terms of Service](#) and [Privacy Policy](#)

**Create Account**

## 3. Enter workspace name, industry and size

upwave

### Create Workspace

Hi Ane Ekern, and welcome to Upwave!

Let's get started and create your first Workspace.

**Give a name to the Workspace**  
My Company Inc.  
Typically a company, department or project.

**Company industry**  
--- Please select ---

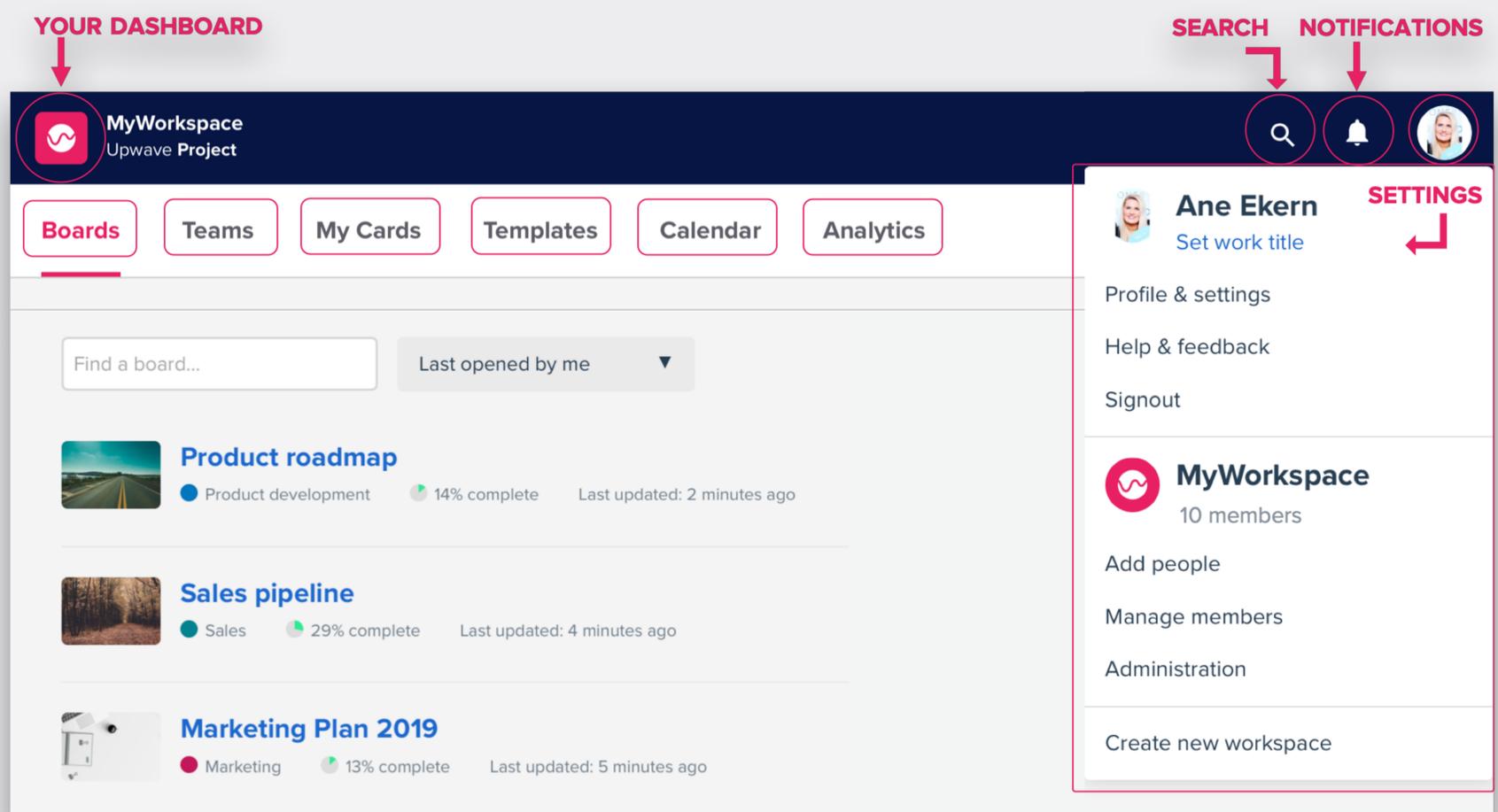
**Company size**  
--- Please select ---

**Create workspace**

# NAVIGATE UPWAVE



Navigating around Upwave is easy. With the menu on the top of the screen you'll find what you're looking for.



**Dashboard:** The "Workspace"-icon takes you to your dashboard, where the default view is a list of your boards. From your dashboard, you will also have access to teams, my cards, templates, calendar and analytics.

**Search:** You can search for card titles and text(descriptions) across all boards. Just press the magnifying glass in the top-right corner, enter a search term and press «search».

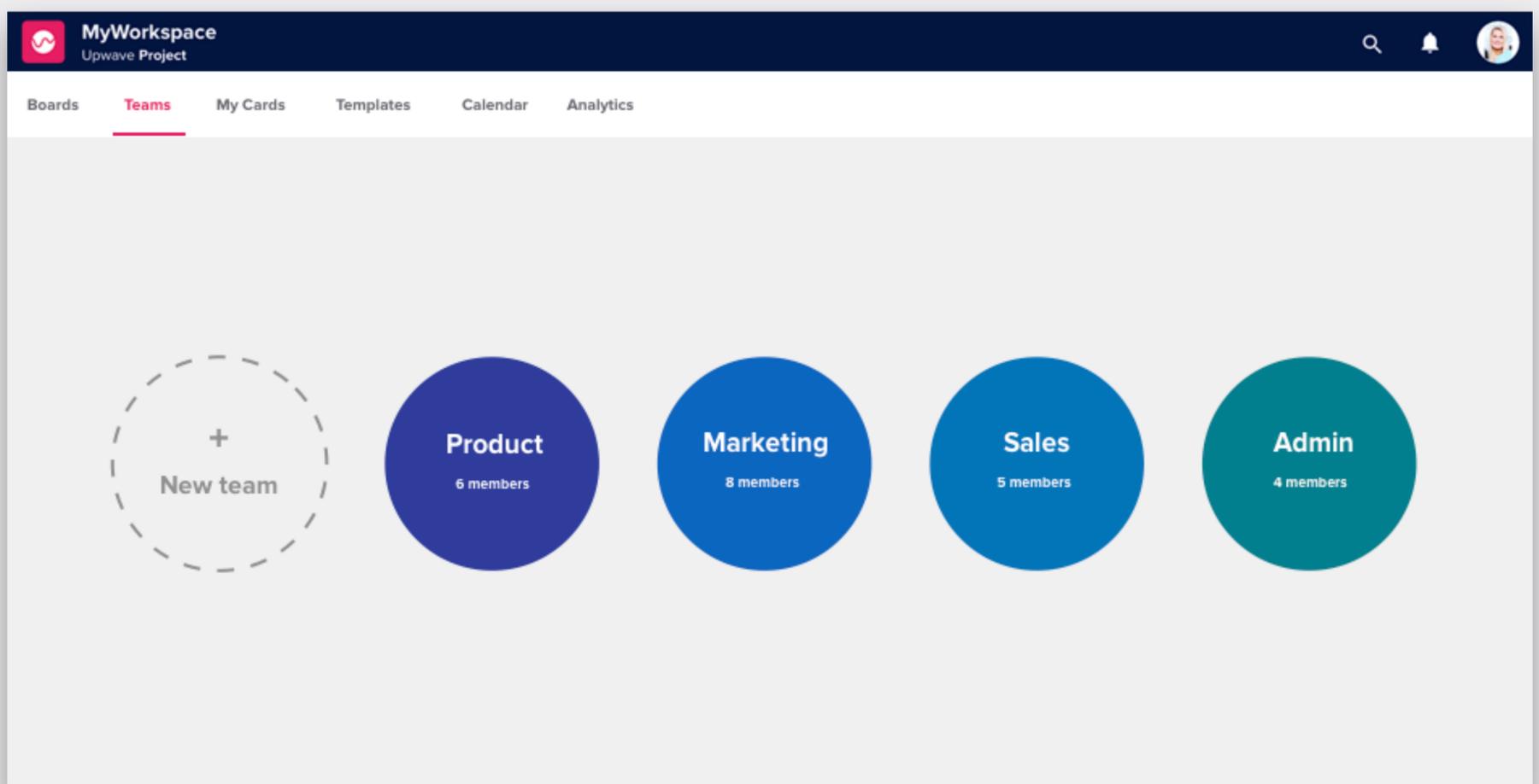
**Notifications:** By pressing the bell icon, you can see all your notifications.

**Settings:** By clicking on your profile picture in the top right corner, you will find settings. Here you can see your personal settings, Helpdesk, invite people, administrate your workspace log out or switch to another workspace.

# CREATE YOUR FIRST TEAM



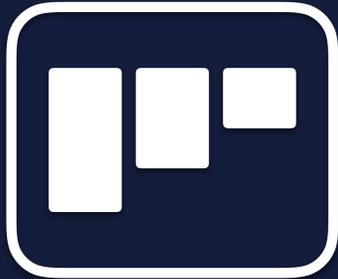
A team in Upwave is a subset of people inside the workspace. You can create teams for different departments, project groups, external suppliers etc.



To find your teams, go to your dashboard and click on the «teams"-tab. Create a team by clicking on the circle «New team". Select team name, team color, and visibility (private or workspace visible) and click "Create." Now that you've created a team, you're ready to create your first board.

[Read more about teams here](#)

# CREATE YOUR FIRST BOARD

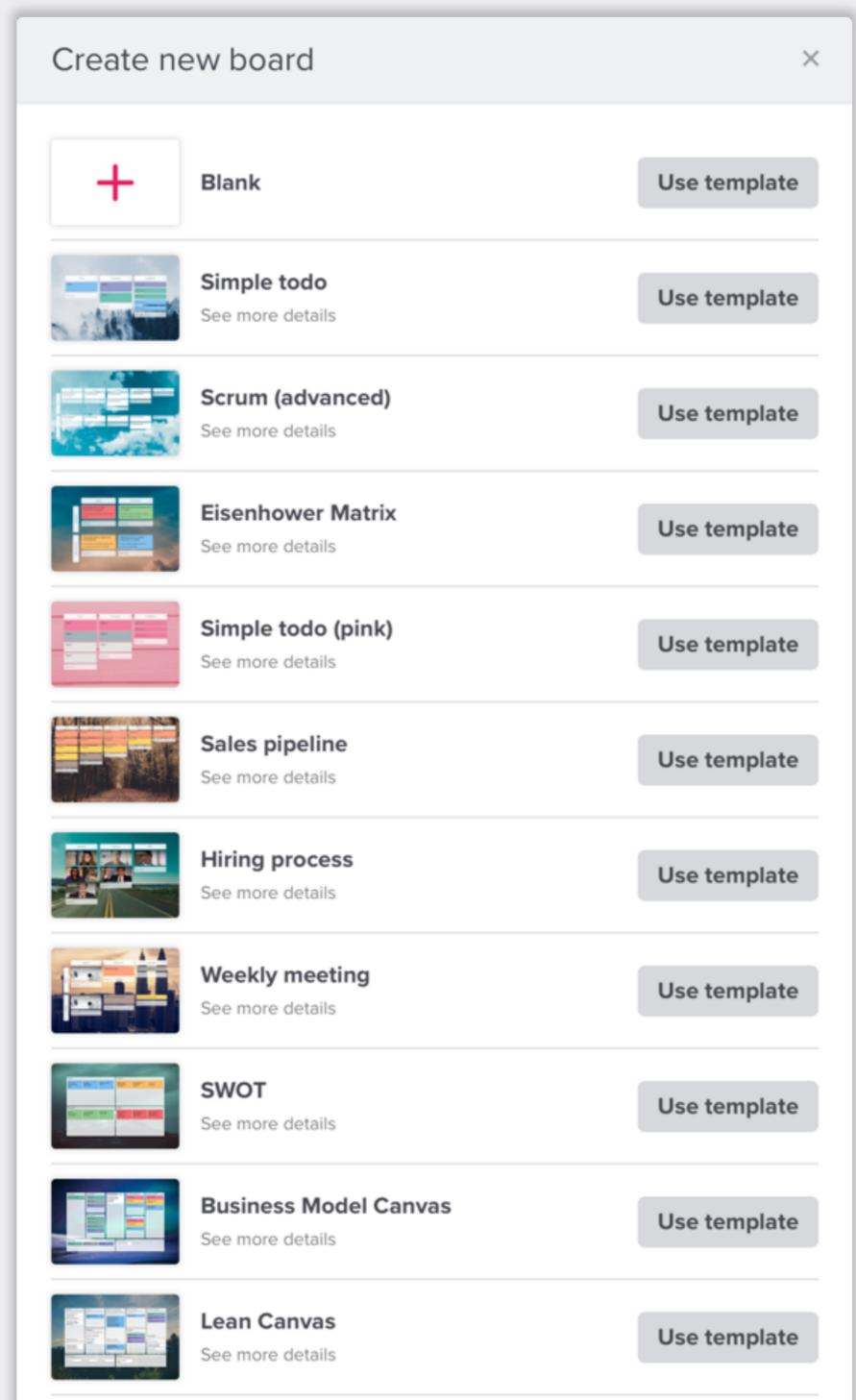


An Upwave board is a shared canvas where board members can collaborate on projects, tasks, ideas, problems etc.

To create your first board, select «Boards» in the top menu, and click on «New board». You can also go to the team where you want the board to be created and select «New board».

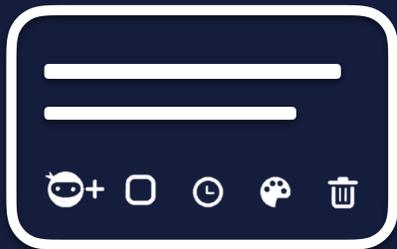
When you create a board, you have to choose which template you want to use. You can start with a blank board, a simple to-do list or a more advanced template, like Business Model Canvas.

Give the board a name, choose who the board will be visible to and which team you want to create it in.



[Read more about boards here](#)

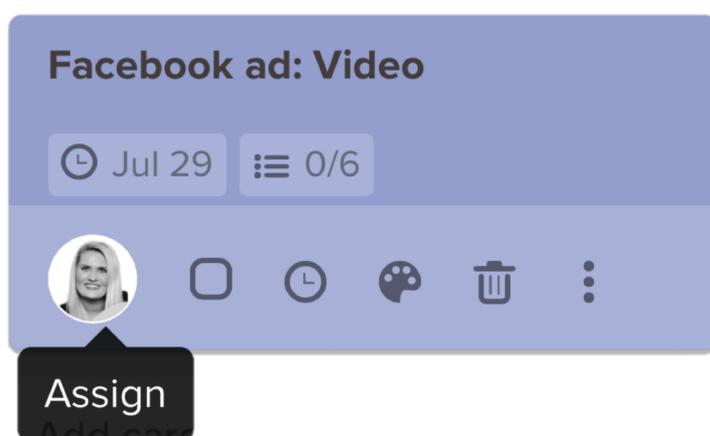
# CREATE YOUR FIRST CARDS



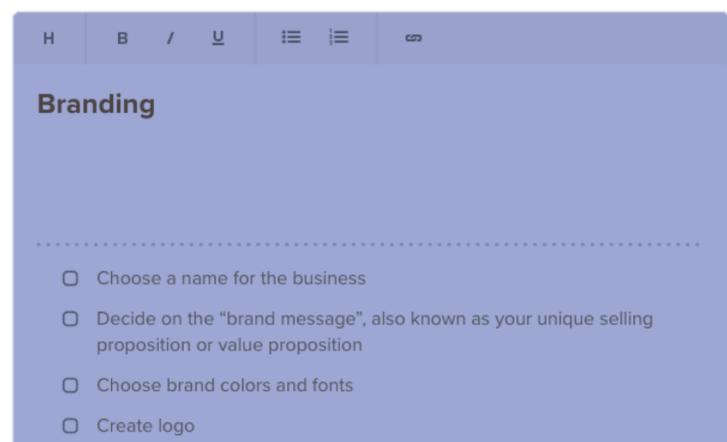
An Upwave card can be viewed as a post-it, where you can collect information about tasks, ideas, issues, customers, etc.

To create your first card, go to the board where you want to create the card and press «Add a card». Provide a brief description of the task, add any sub-tasks, set a deadline, upload files and delegate the card to the person responsible.

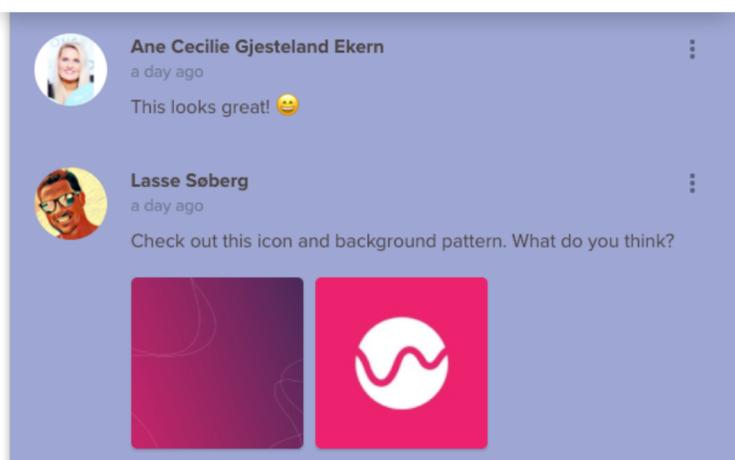
## DELEGATE TASKS AND SET DEADLINES



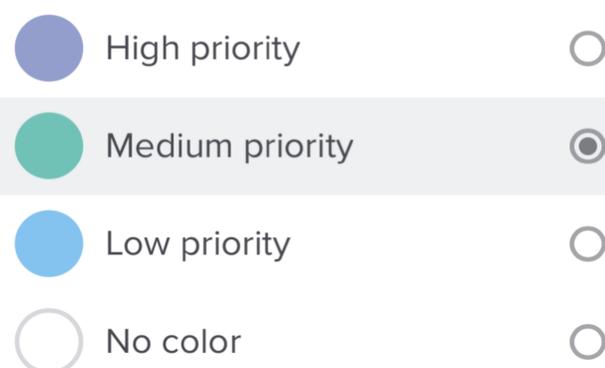
## DIVIDE COMPLEX TASKS INTO SMALL SUBTASKS



## COMMENT, UPLOAD FILES AND GET FEEDBACK



## CATEGORIZE CARDS WITH COLORCODING



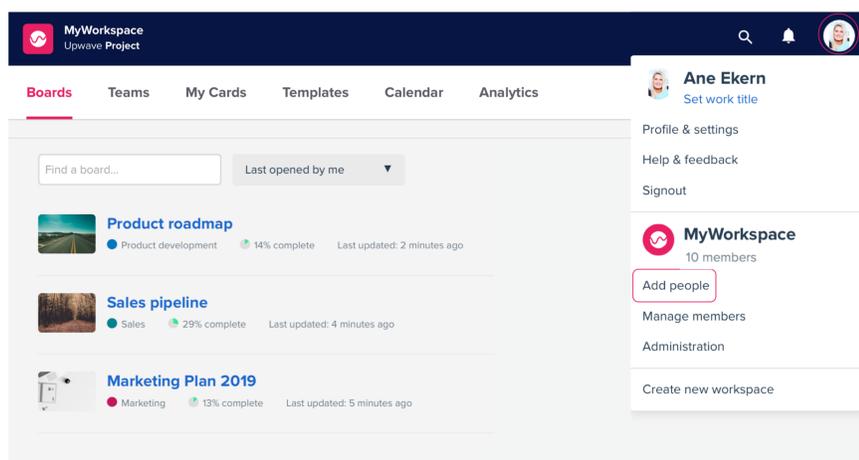
[Read more about cards here](#)

# INVITE TEAMMEMBERS

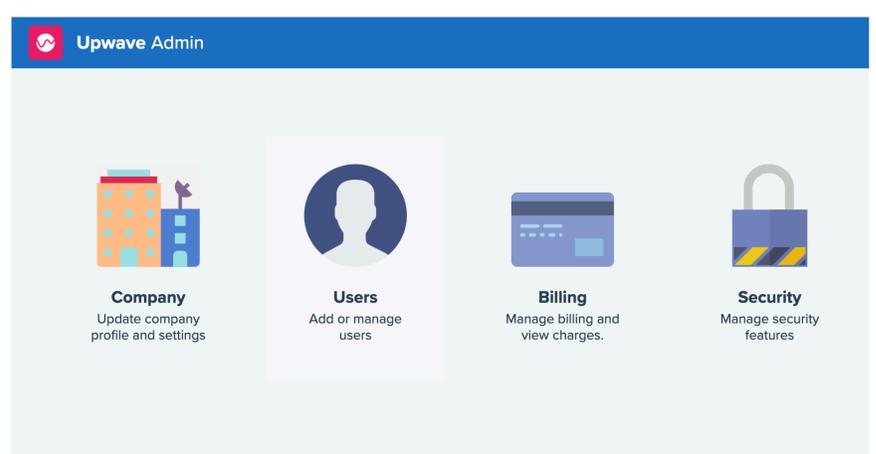


There are several ways to invite new teammembers, and it only takes a couple of seconds.

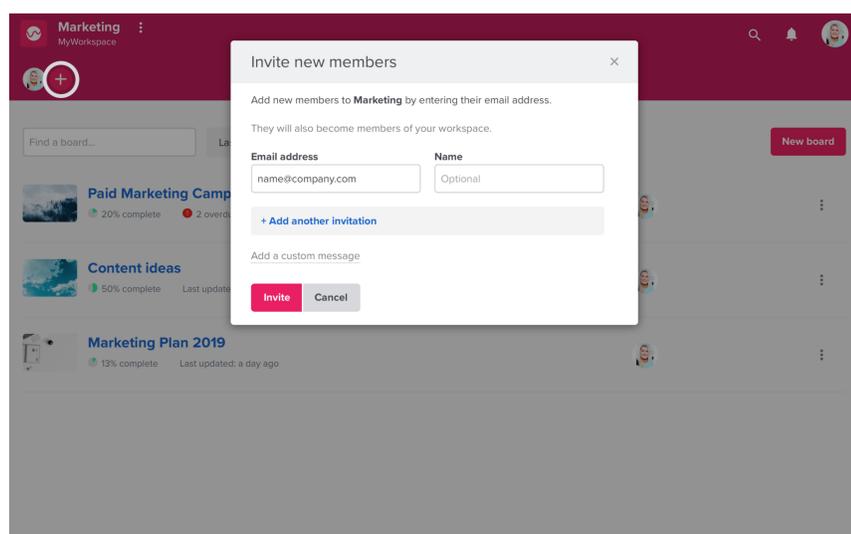
## 1. INVITE FROM SETTINGS



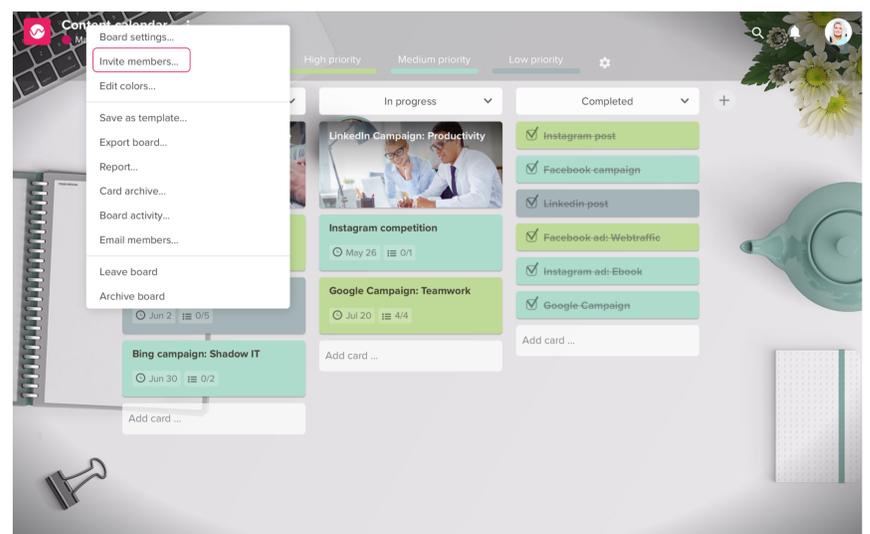
## 2. INVITE FROM THE ADMIN PAGE



## 3. INVITE FROM A TEAM



## 4. INVITE FROM A BOARD



[Read more here](#)

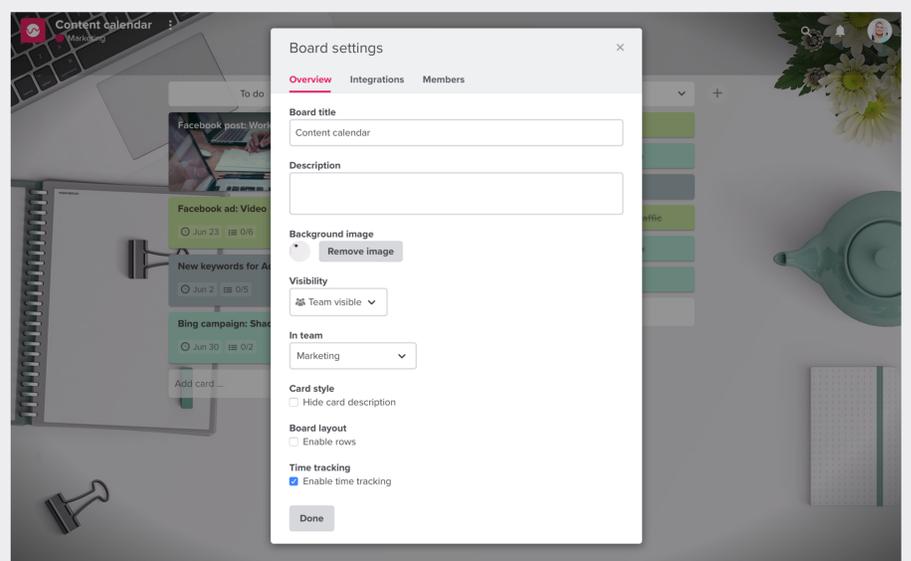
# ENABLE TIME TRACKING



Track time spent on your tasks and set estimates.

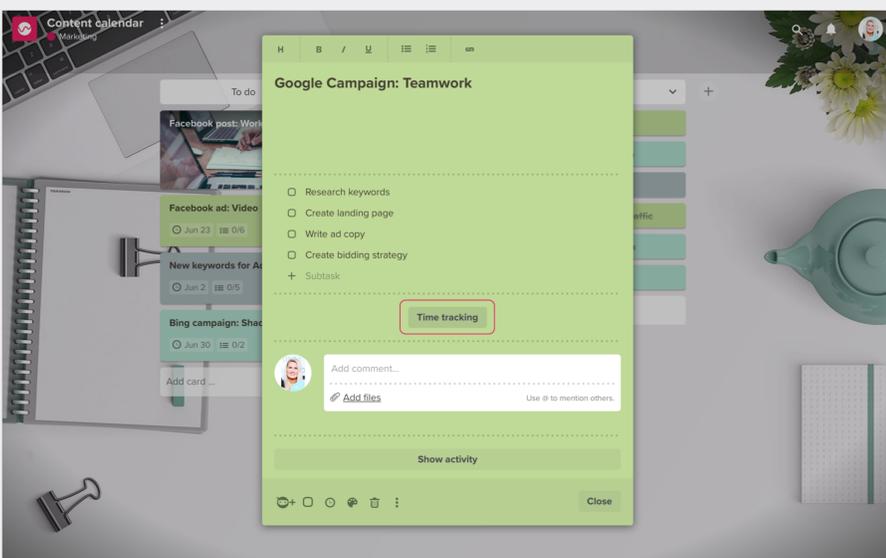
## 1. Enable time tracking

Go to board settings on the board where you want to start tracking time and click «Enable time tracking».



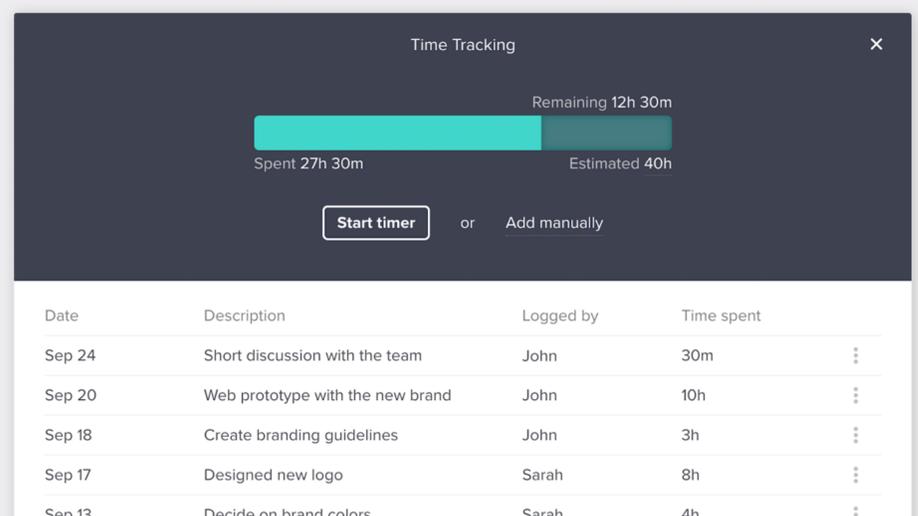
## 2. Start tracking time on cards

Open the card where you want to track time and click on the button «Time tracking».

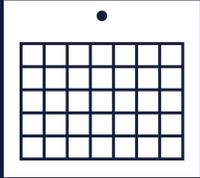


## 3. Use the timer or add manual entries

When you open the time tracking window, you can either use the timer or add manual time entries. You can also add an estimate for how much time you're going to spend on that card. All the time that have been logged on a card will be shown as a list, with date, description, who logged it and time spent.

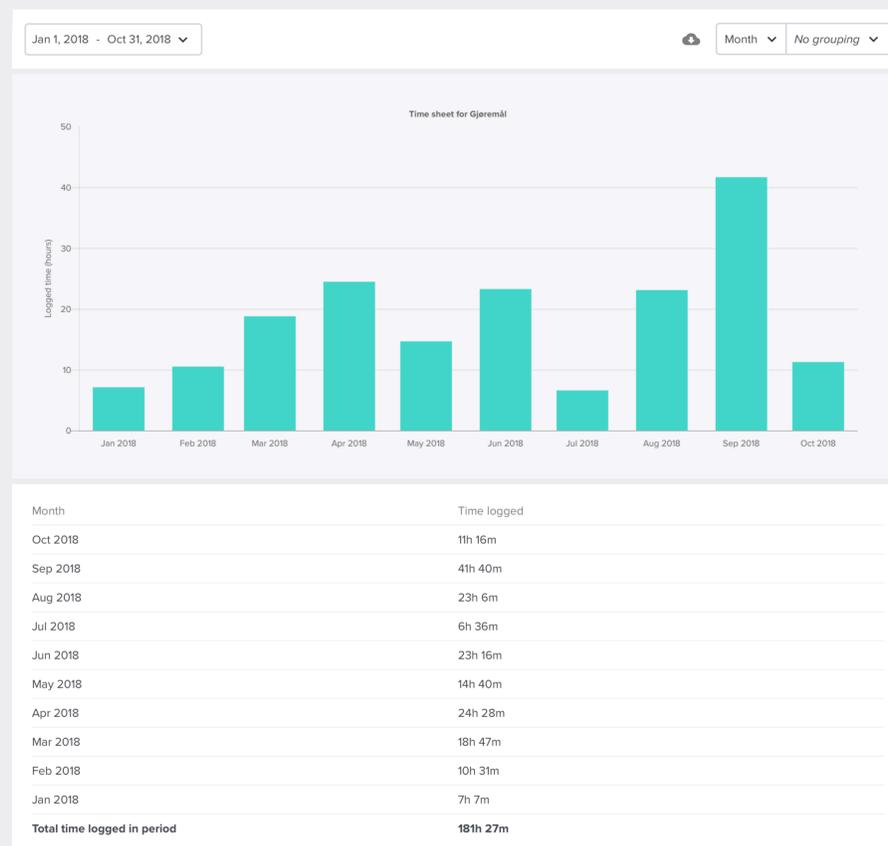


# GENERATE TIME-SHEETS



Easily generate and export timesheets at project-, task- or user-level.

Go to board options, and select «time sheet».



## Select data range

- This month
- Past month
- Past 3 months
- This year
- Pick a date range...

Choose which time period you want the time sheet to show. You can either choose one of the predefined options or pick a date range.

## Select time unit

- Day
  - ✓ Month
  - Year
- No grouping ▾

Choose whether you want to display logged hours by day, month or year.

## Select grouping

- Month ▾
- ✓ No grouping
  - Card
  - User

Choose whether you want logged hours to be grouped by user or by card. You can also choose «no grouping» if you only want to see the total logged hours.

## Download report

- Download PDF
- Download CSV

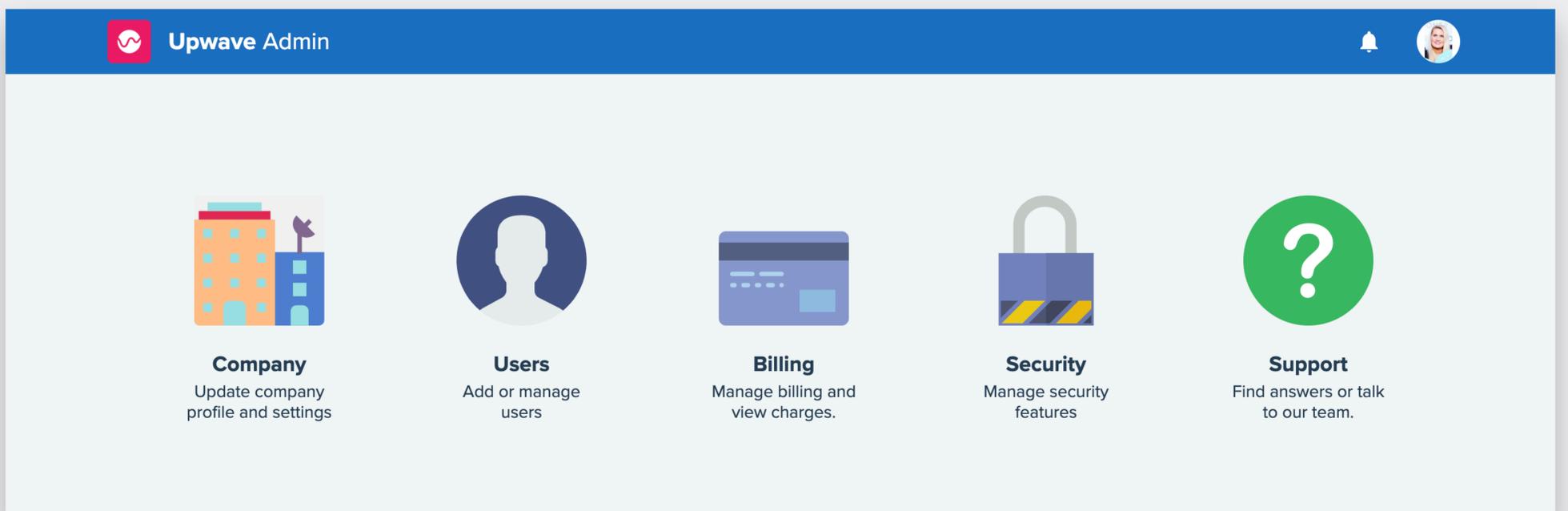
You can easily download your time sheet report either as a PDF- or a CSV-file.

# WORKSPACE SETTINGS



Administrate your workspace from the admin panel.

To find the workspace administration page, click on your profile picture in the top menu and select "administration", or go to [admin.upwave.io](https://admin.upwave.io).



## From the admin panel, you can:

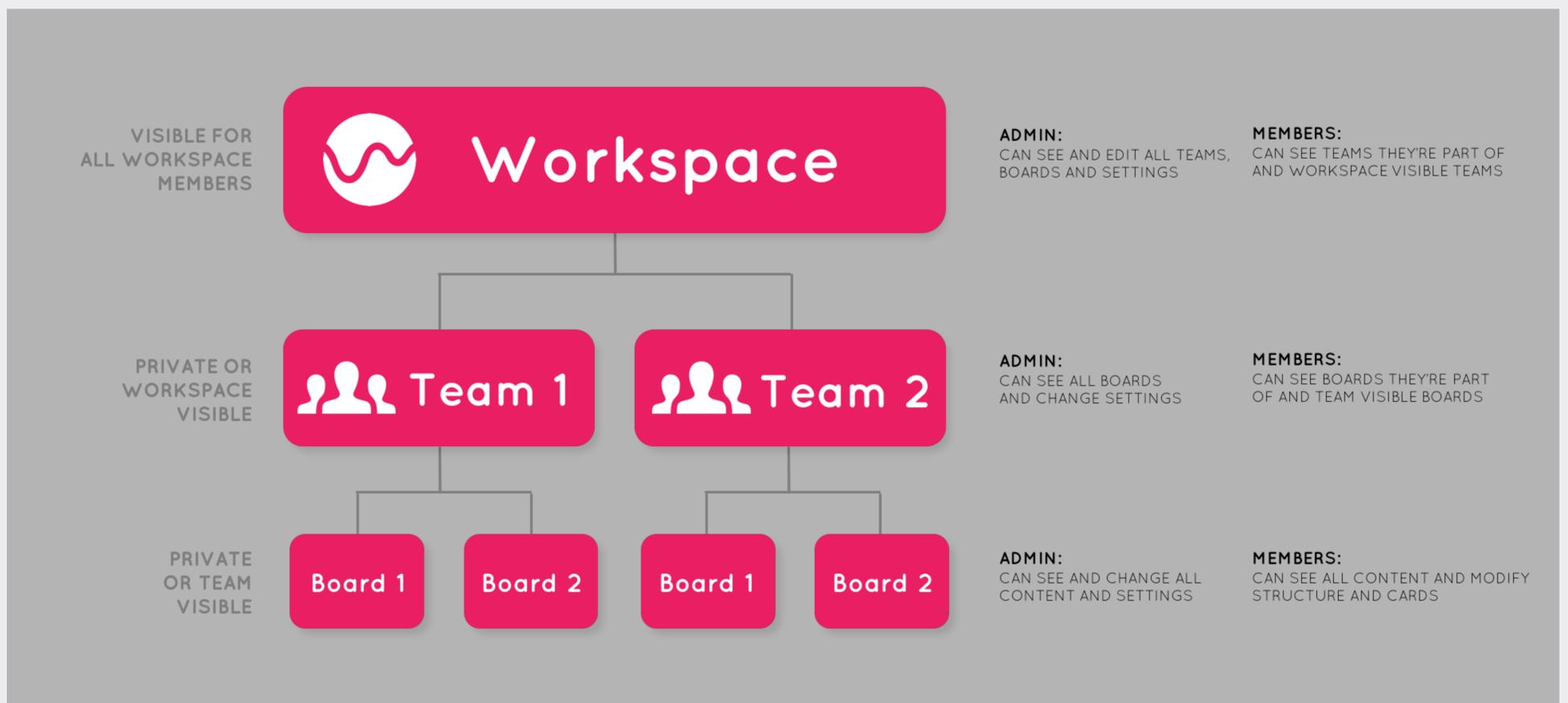
- Update company profile and settings
- Add or manage users
- Manage billing and view charges
- Manage security features (SSO)
- Access support

# WORKSPACE PERMISSIONS



There are three hierarchical levels of permissions in Upwave: Workspace permissions, team permissions and board permissions.

Your permissions depend on whether you are an admin or a member.



## Workspace Admin

A workspace admin has full access to everything in the organization, can edit Workspace Settings like billing information, have the permission to delete the entire workspace and disable any members within. The person creating the Workspace is automatically set as Admin, and can add new admins.

## Workspace Member

A Workspace member (default permission), is not able to access Workspace settings, but is allowed to create new teams or boards. Workspace member can also access (and join) all Public Boards and Public teams within your shared Workspace.

A Workspace member that creates a team or a board is considered an admin in that particular team or board and will have privileges to edit the team- and/or board-settings.

# ACTIVATE SINGLE SIGN ON FOR G SUITE OR MICROSOFT



Allow members to use their Google or Microsoft Office 365 account to log into Upwave instead of email and password.

To enable Google G suite or Microsoft office 365 authentication for your workspace members, click on «Security» in the Admin panel.

**Upwave Admin**

## Security settings

**Google G Suite authentication**  
Enabling this feature, your workspace members can use their Google account to sign in instead of email and password. Enable

**Microsoft Office 365 authentication**  
Enabling this feature, your workspace members can use their Microsoft Office 365 account to sign in instead of email and password. Enable

**Invite people via link**  
Share this link with other to grant access to your Workspace.

[https://accounts.testupwave.io/signup/?signup\\_token=d7bcb414c4cd49869ed559e9cb8e1b12](https://accounts.testupwave.io/signup/?signup_token=d7bcb414c4cd49869ed559e9cb8e1b12) Copy

When enabled, users who sign in with connected G suite or Microsoft office 365 accounts will automatically gain access to the workspace. They will be required to log in with their Google or Microsoft account when accessing the workspace. If you invite an external user (not a part of your G suite or Microsoft office account) to your workspace, they will not be required to use Single Sign On.

# DOWNLOAD THE APP



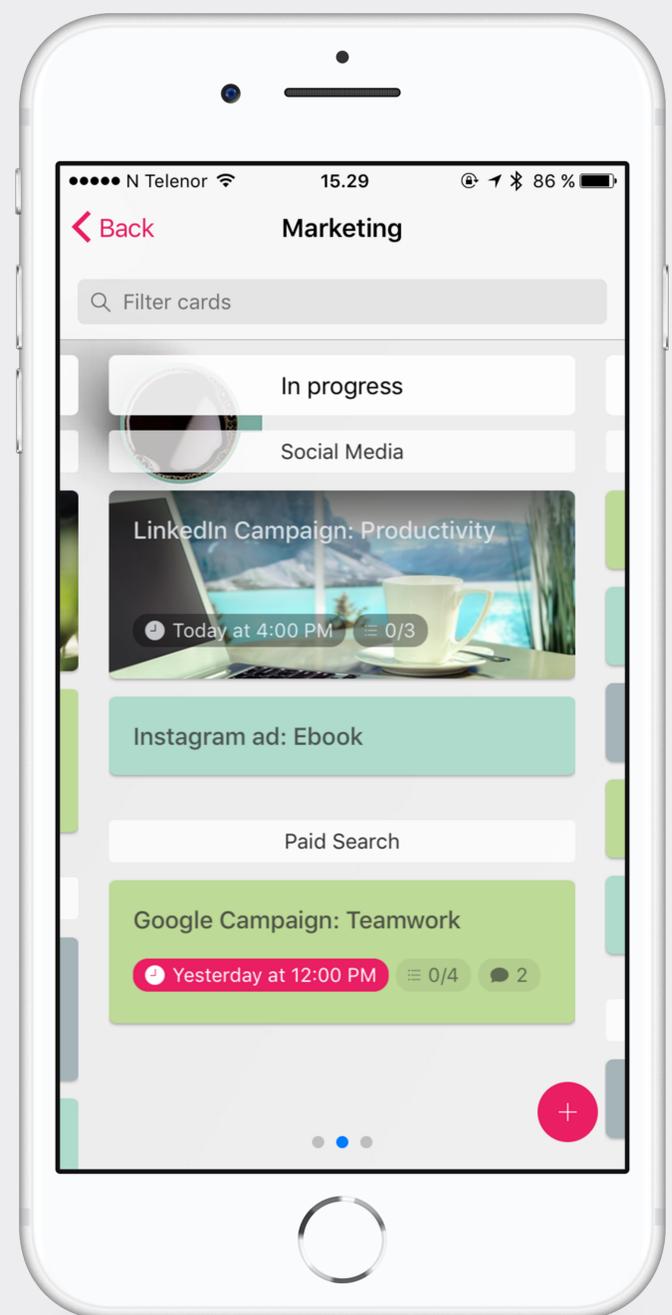
Upwave is available on both web and mobile, which makes it easy to get things done both at the office, at home and on the go.

## Keep up to date on your projects

- Get an instant overview of your tasks and deadlines
- Navigate visual boards for your workflow and projects
- Receive notifications
- Filter boards and cards

## Organize your workflows and collaborate

- Delegate tasks to yourself or team members
- Set deadlines
- Create subtasks
- Write comments and descriptions



[Download from Google Play](#)

[Download from App Store](#)

# INTEGRATE WITH YOUR FAVORITE TOOLS

## SINGLE SIGN-ON



G-SUITE



MICROSOFT OFFICE  
365



SLACK



GOOGLE HANGOUTS  
CHAT

## FILE STORAGE



GOOGLE DRIVE



DROPBOX



SHAREPOINT



ONEDRIVE

## CALENDAR



GOOGLE CALENDAR



OUTLOOK CALENDAR

## OTHER



ZAPIER



EXTENSION FOR  
ADOBE CREATIVE  
CLOUD