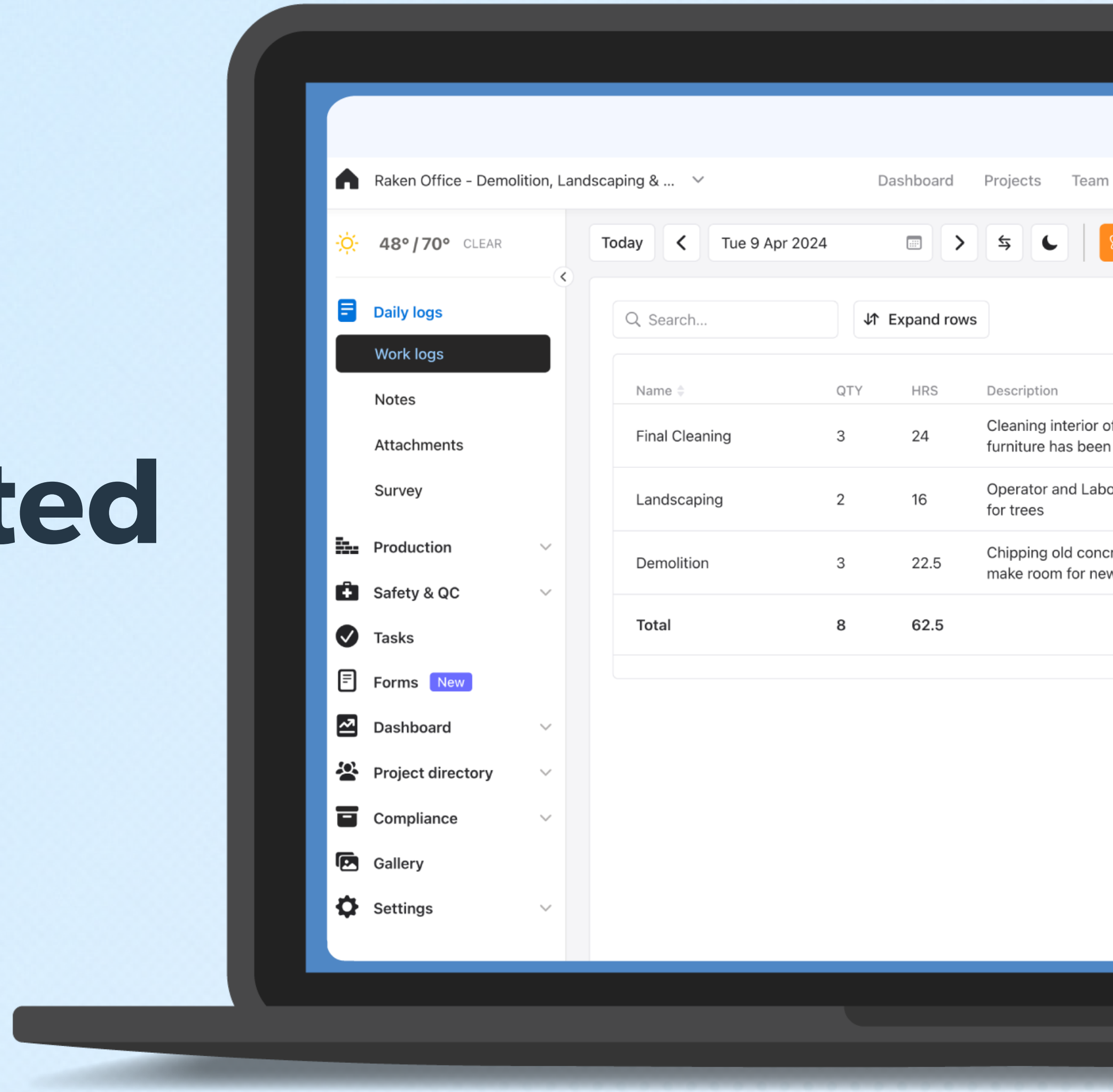
Raken

Getting Started with Raken

Web App



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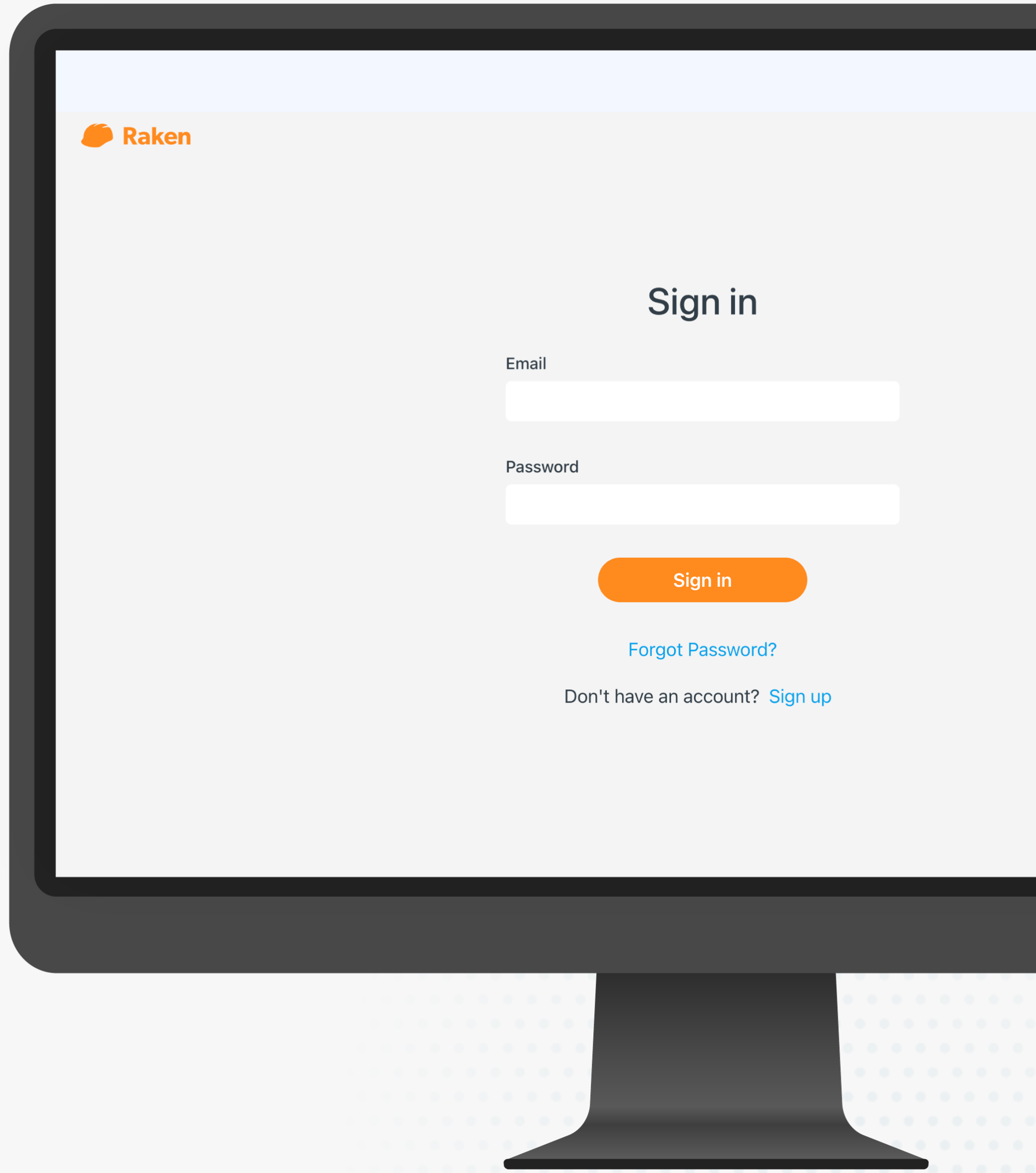
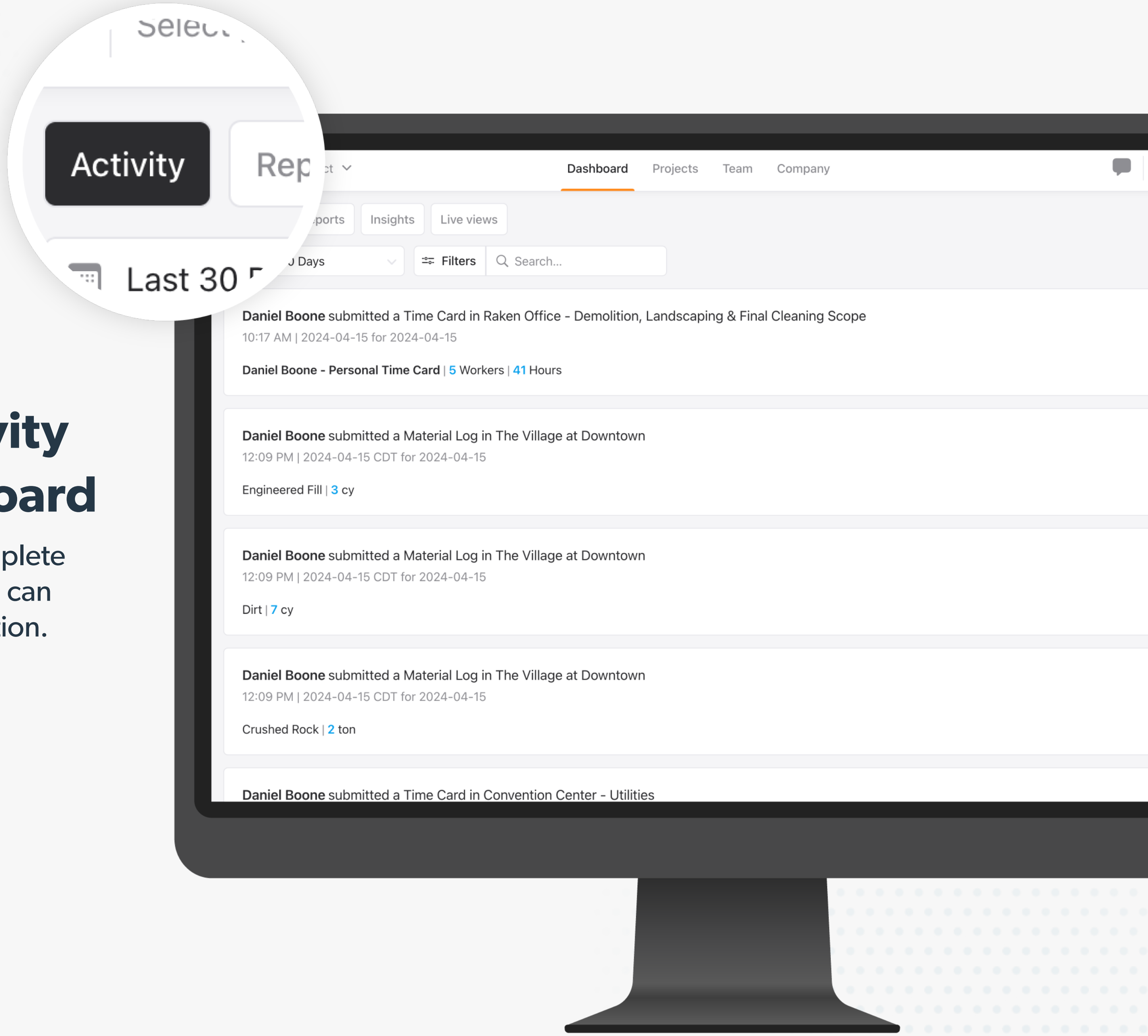
Log in at rakenapp.com

Raken Tips

To add real data to your trial projects, download the Raken app for mobile field reporting.



Explore the Dashboard



Get a real-time activity feed on your dashboard

As your field teams submit time, complete tasks, or take photos on the app, you can see it all here in one convenient location.

Check out the tabs in the upper left.

Activity:

Shows a full overview of all your projects. You can also filter to drill down by project or team member.

Reports:

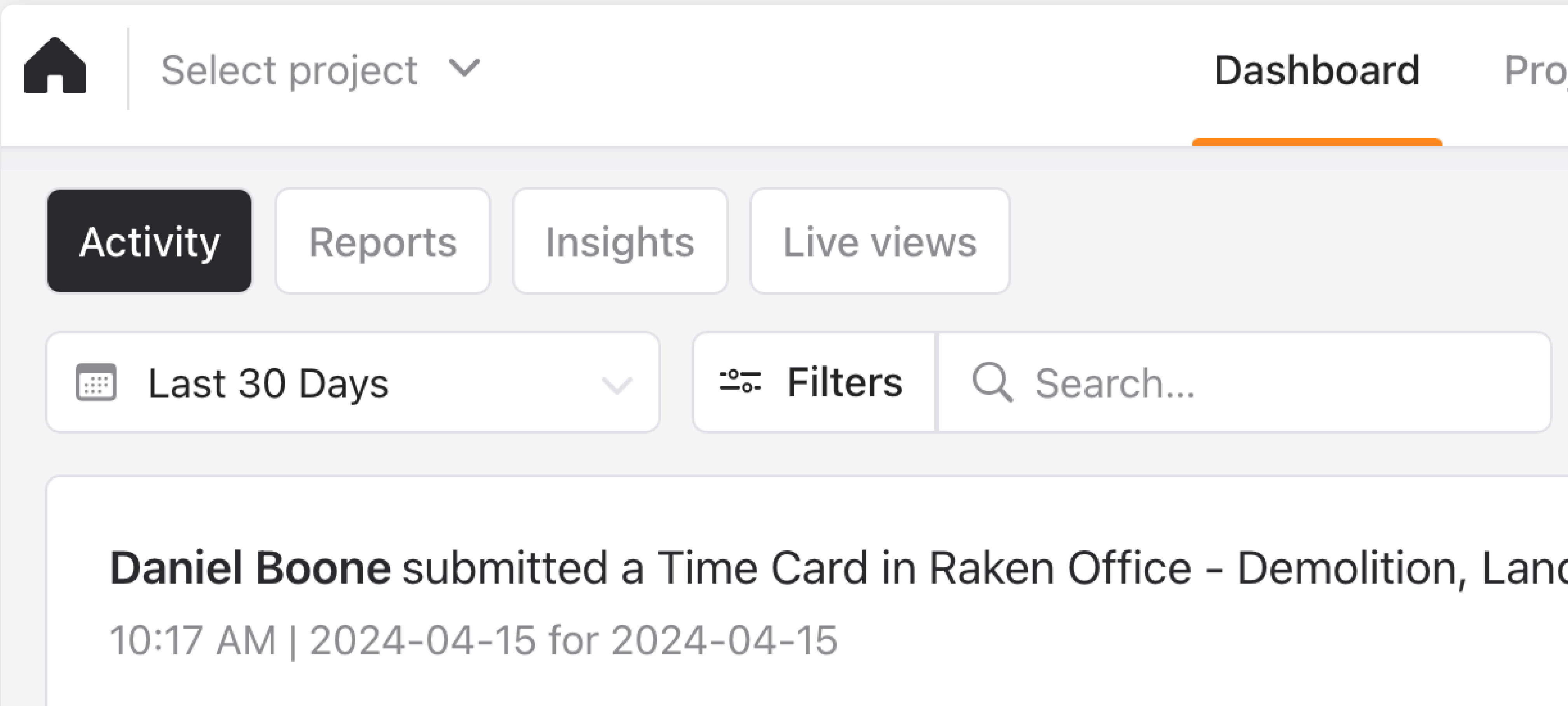
Collect workers and hours, safety incidents, weather conditions,and report attachments per project.

Insights:

Gives you detailed metrics across projects.

Live Views:

Opens our live jobsite monitoring integrations.



You'll also see tabs across the top of your screen.

Projects:

Shows you projects, their job number, start date, zip code, and status.

Team:

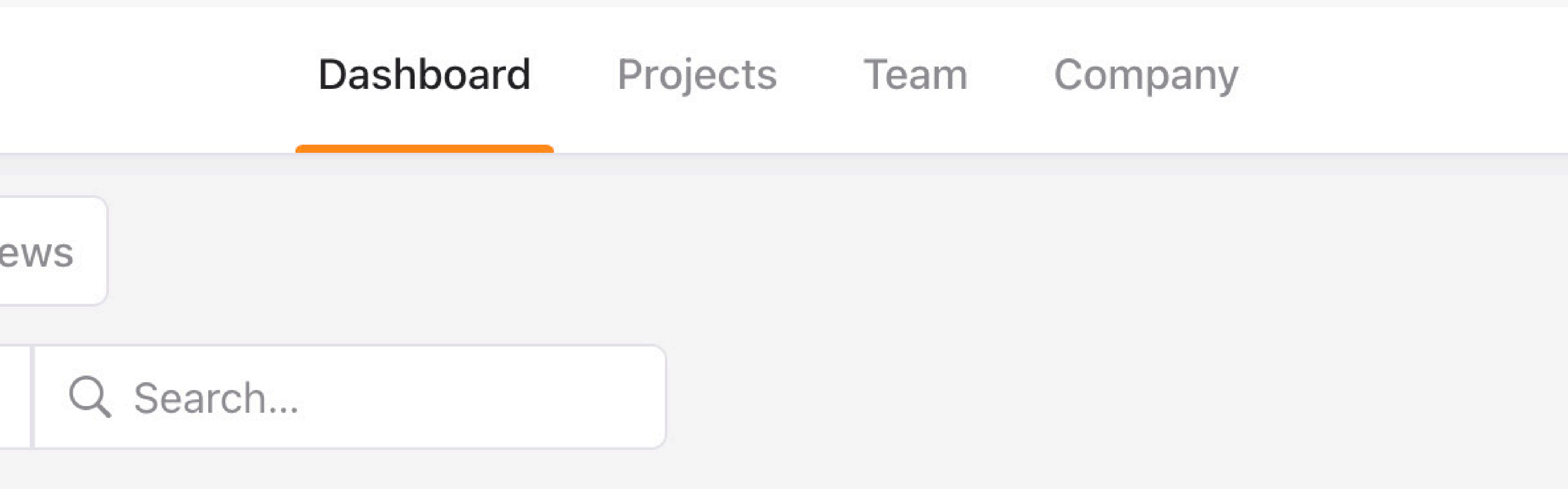
Gives you access to add members, certifications and other workforce management tools.

Company:

Is a space for editing company info, roles and permissions, templates, and more.

Raken Tips

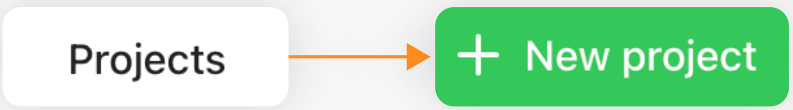
Select the sample project to get a feel for all the data you can capture with Raken.



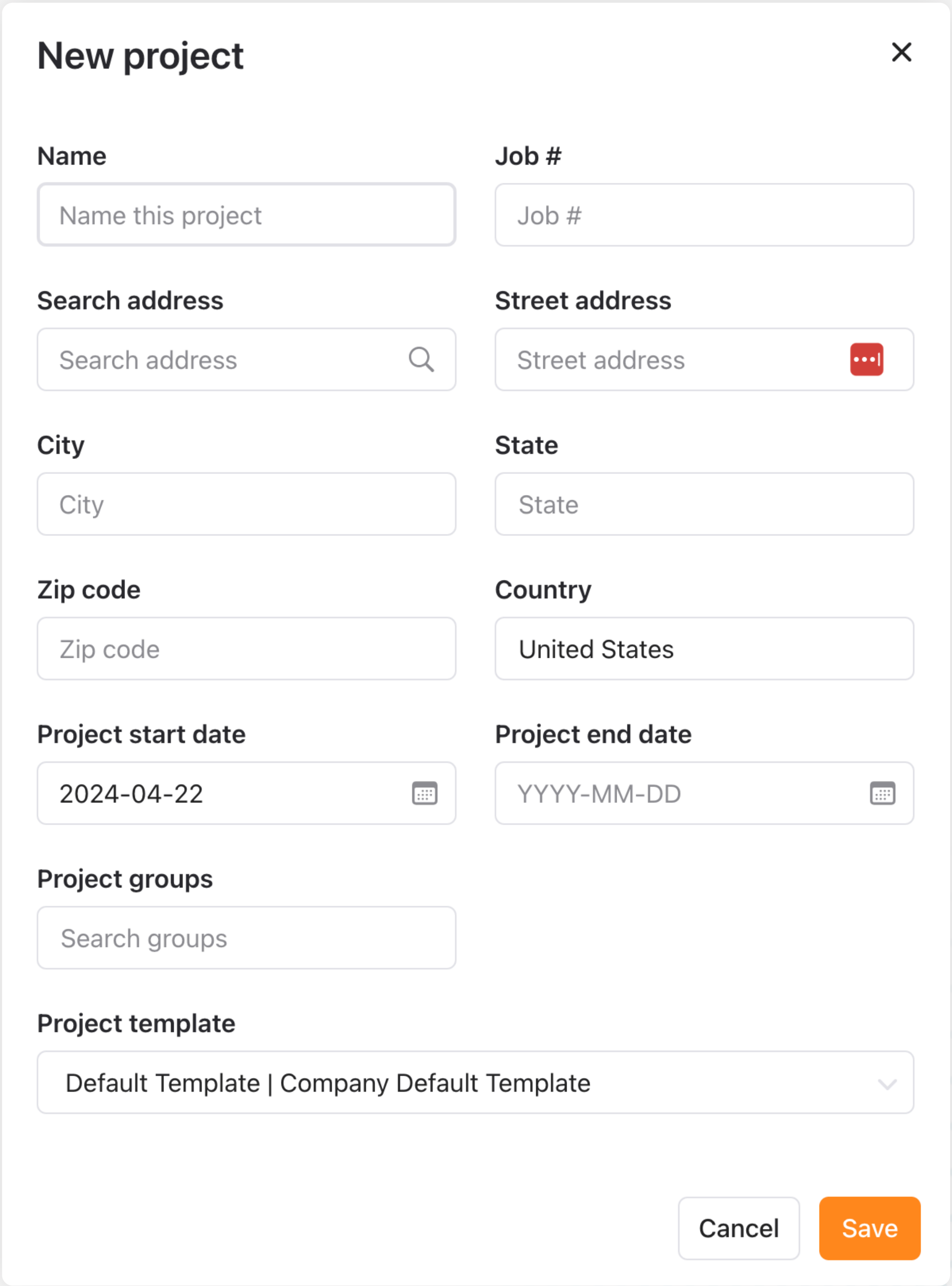
Create a project

Create a project

Select the Projects tab, then click the green + New project button. (Or, click Create a project from the Get Started menu.)



Once you fill in all your project info in the popup window, click Save. You can edit the project and customize your groups and templates later.



What's in a Raken project?

You'll see a left hand sidebar with all your project tools and options, including:

Daily logs
See daily reports and work logs

Production
View time, material, and equipment data and more

Safety & QC
Create and assign custom checklists and review observations

Tasks
Create, assign, and review tasks

Forms
Upload, share, and edit project documents

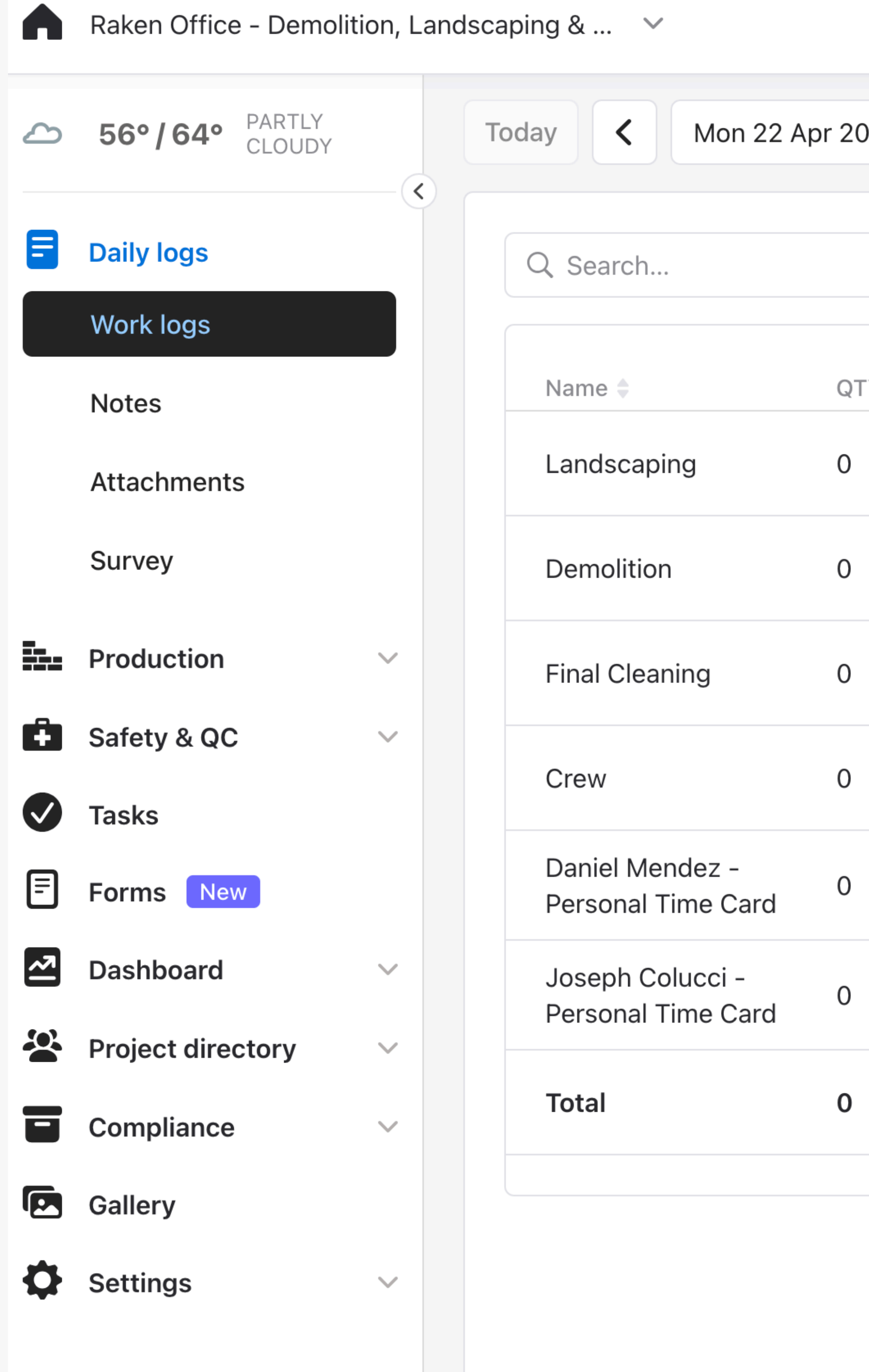
Dashboard
See a dashboard view of project activity

Project directory
Find contact info for project personnel

Compliance
Monitor report compliance

Gallery
View all project photos and videos

Settings
Adjust your project settings and setup notifications



Customize your project

Customize project details and reports

Click Settings in the left sidebar to customize your project details.

Daily reporting - What sections are in your daily report, who receives them, and if you need segments to allow multiple daily reports for one project.

Payroll and time - Configure pay types, break rules and project radius.

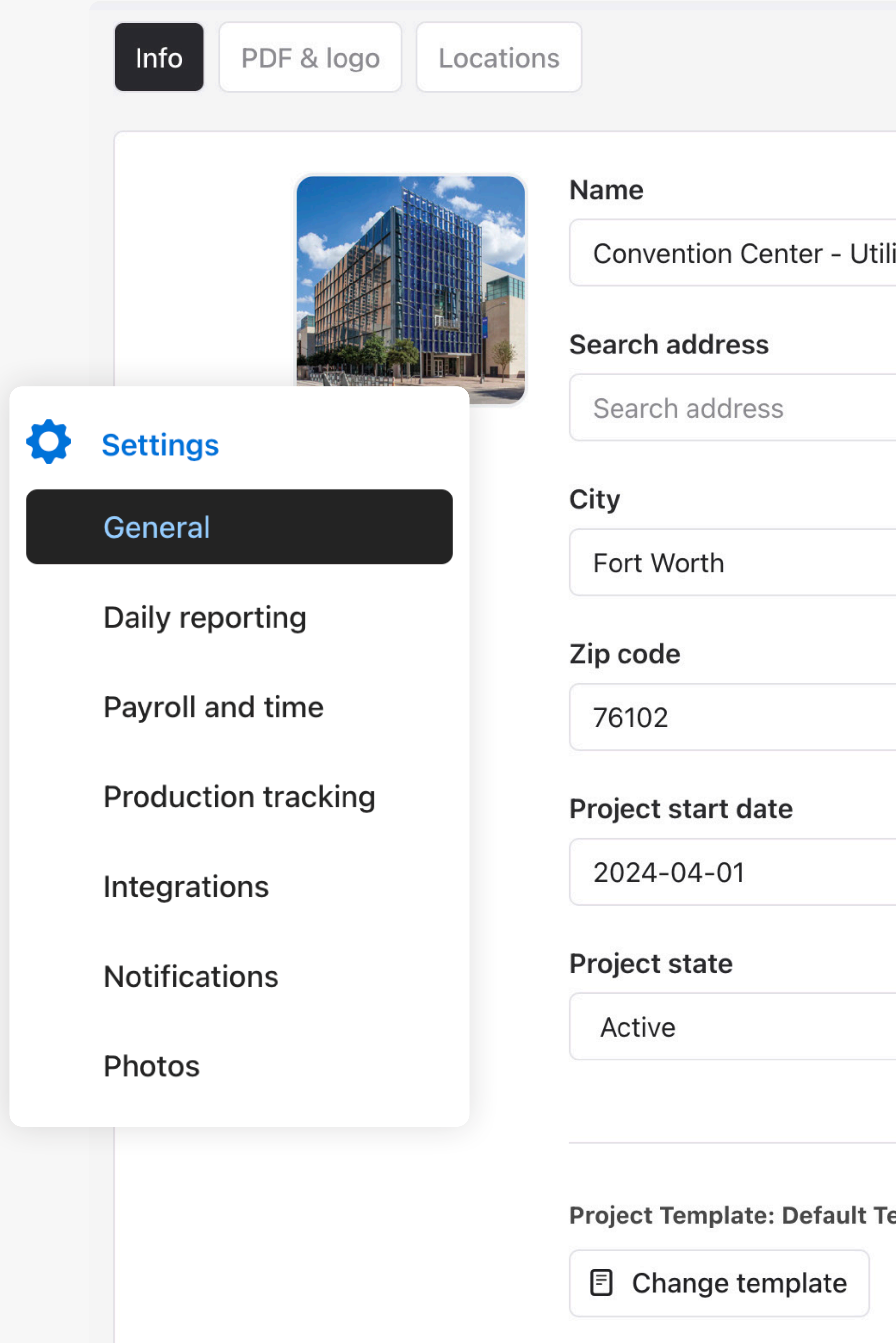
Production tracking - Add cost codes, material and budgets.

Integrations - With your accounting software, cloud storage system and more.

Notifications - Select which team members will be notified in case of safety issues, delays or missed reports.

Raken Tips

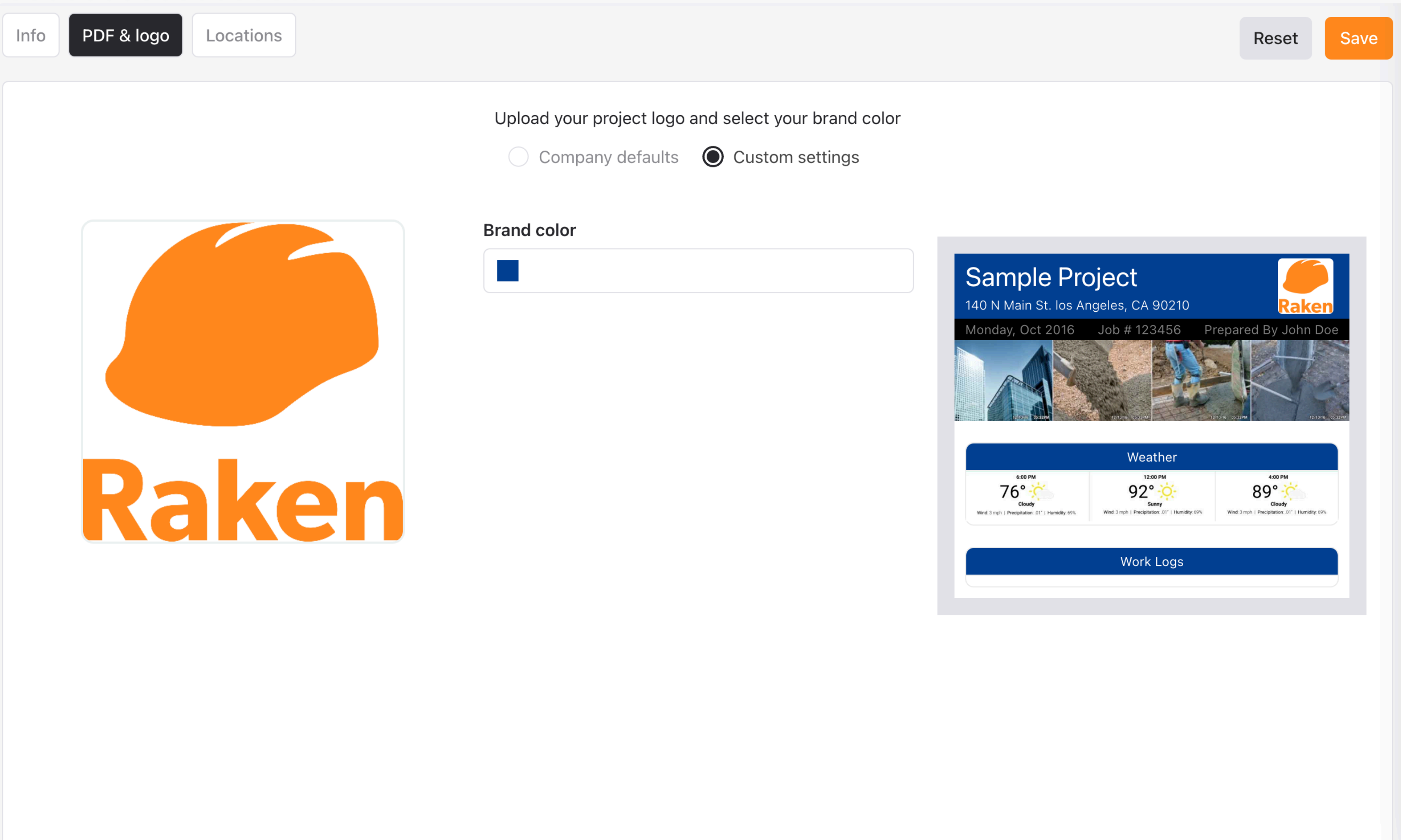
To create project templates and other rules to apply across projects, visit the Company tab from your main dashboard.



PDF & Logo

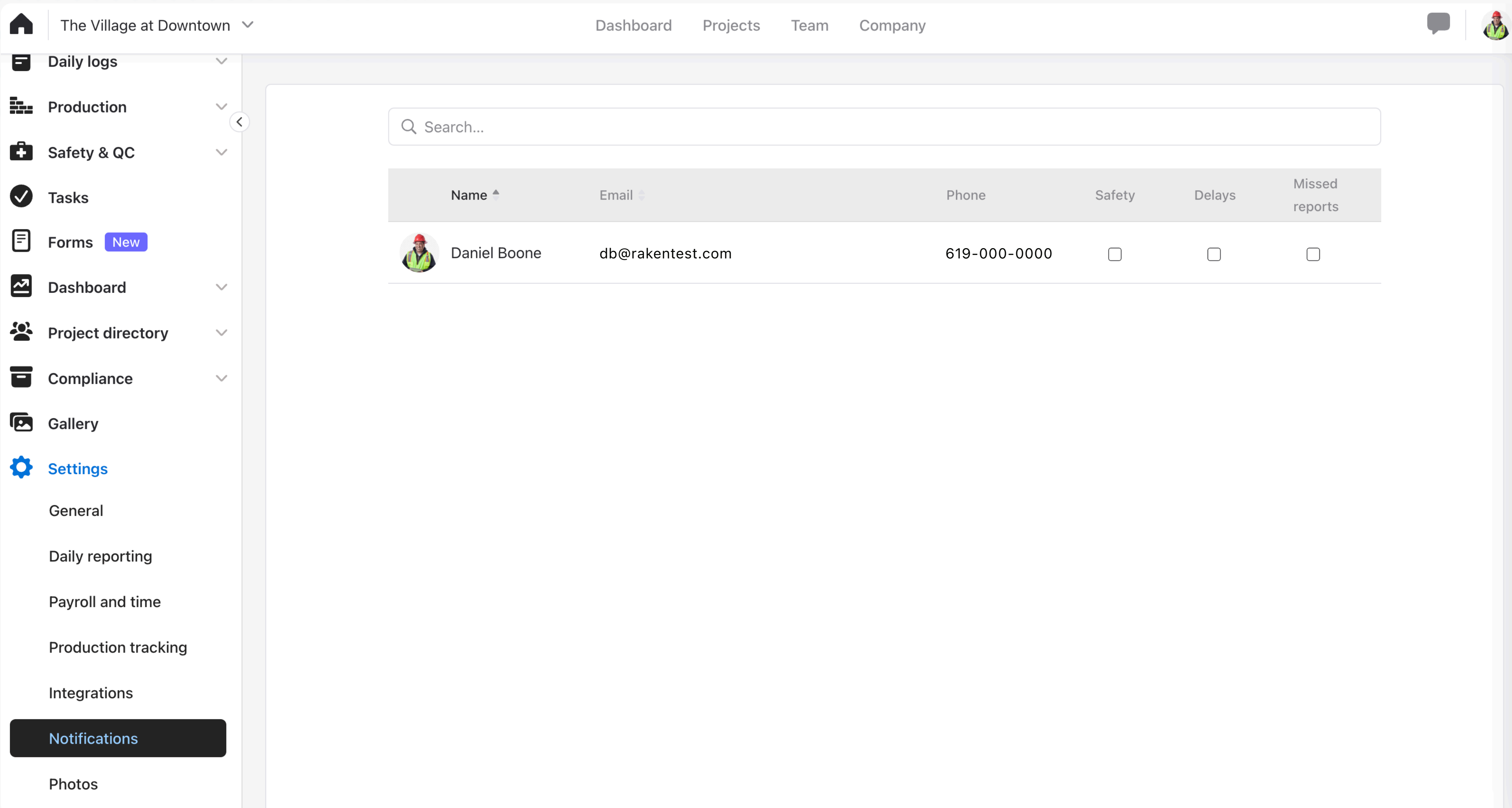
Click the PDF & Logo tab in the settings top bar to upload a company logo and choose your brand color.

Both are automatically pulled into daily reports, so they'll have a more professional touch.



Notifications

Select Notifications from the Settings submenu to choose who gets alerts for safety, delays, and missed reports.



Invite team members

You can invite team members and workers to Raken and assign them to one or multiple projects.

Invitees will receive an email with instructions for logging into Raken.

Raken Tips

What is a team member vs. worker?

Team members have more access to Raken's tools and workflows. You can adjust their permissions so they can use both our web and mobile app to collect and manage field data.

Workers can only access the mobile app and will use Raken primarily to log work hours.

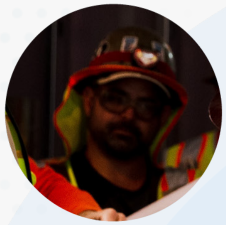
Invite team members

First Name	Last Name	Email (Username)	EID (Optional)	Phone Number (Optional)	Role
First	Last	Email	EID	+1	Role

Add a personal message

Type your message here

Cancel Save

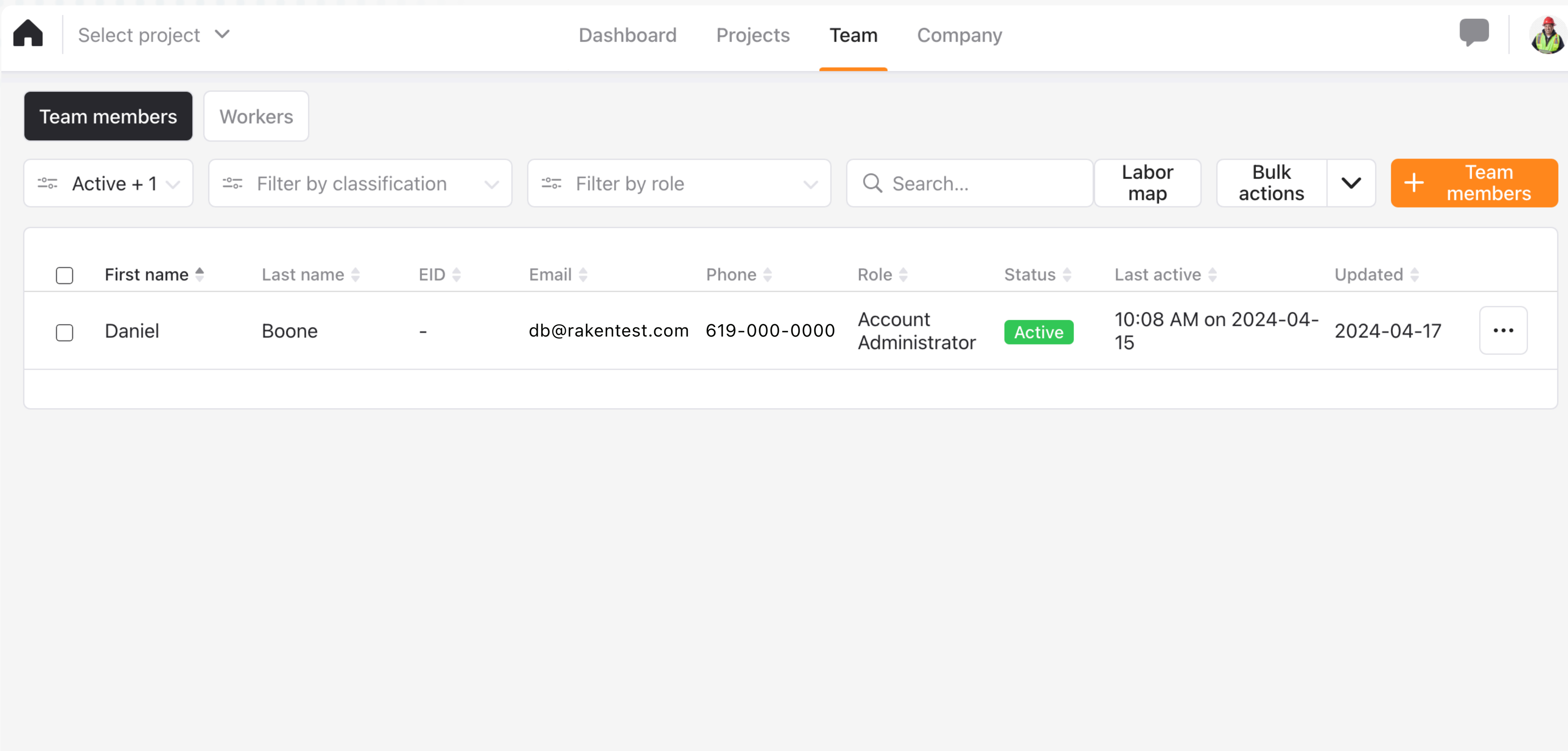


Build your workforce

There are two ways to invite team members to use Raken: from the web dashboard or within an individual project.

Option 1: From the web dashboard

Click Team from the top menu. Use the orange “+ Team Members” button to add a new team member.

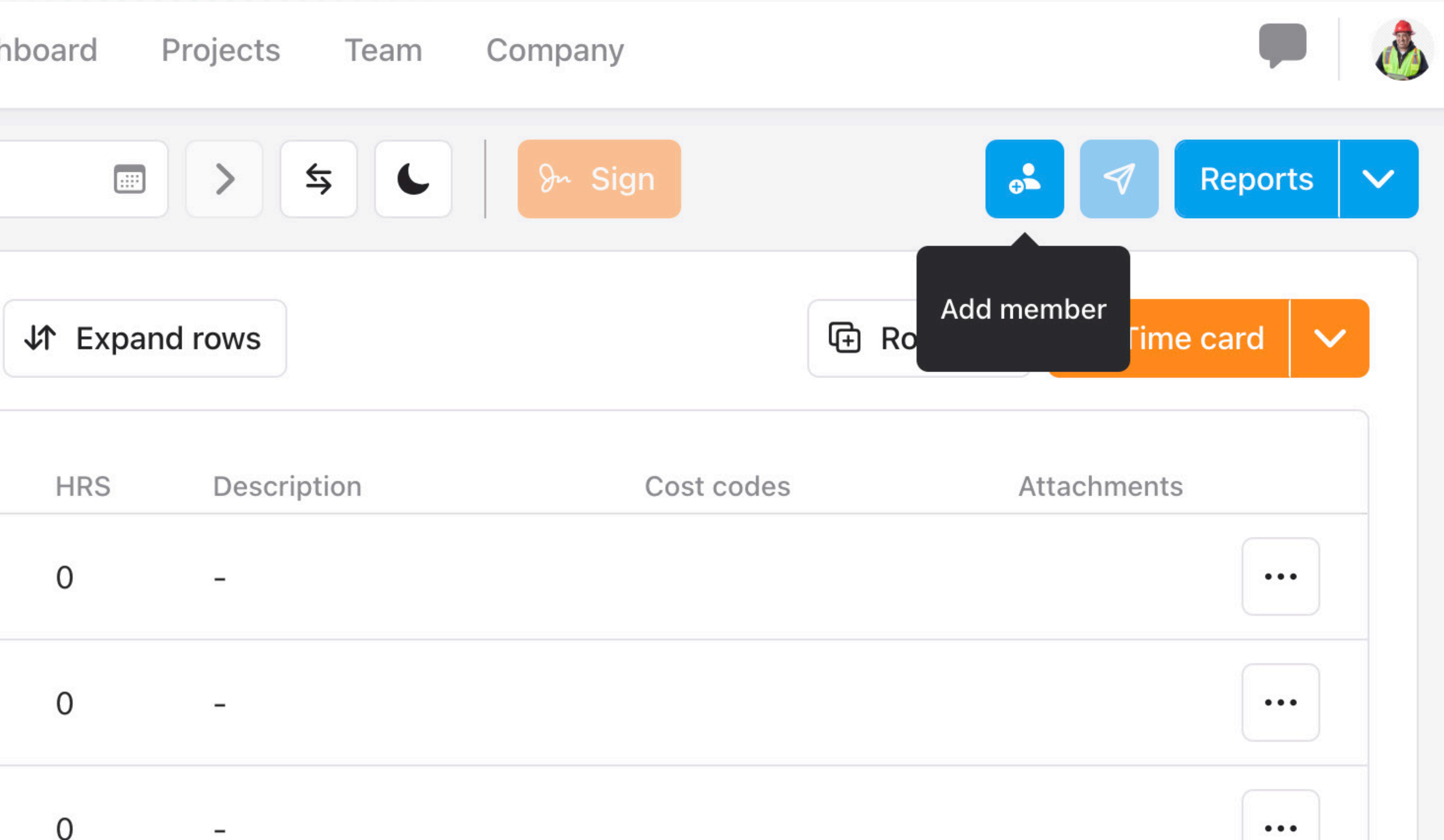


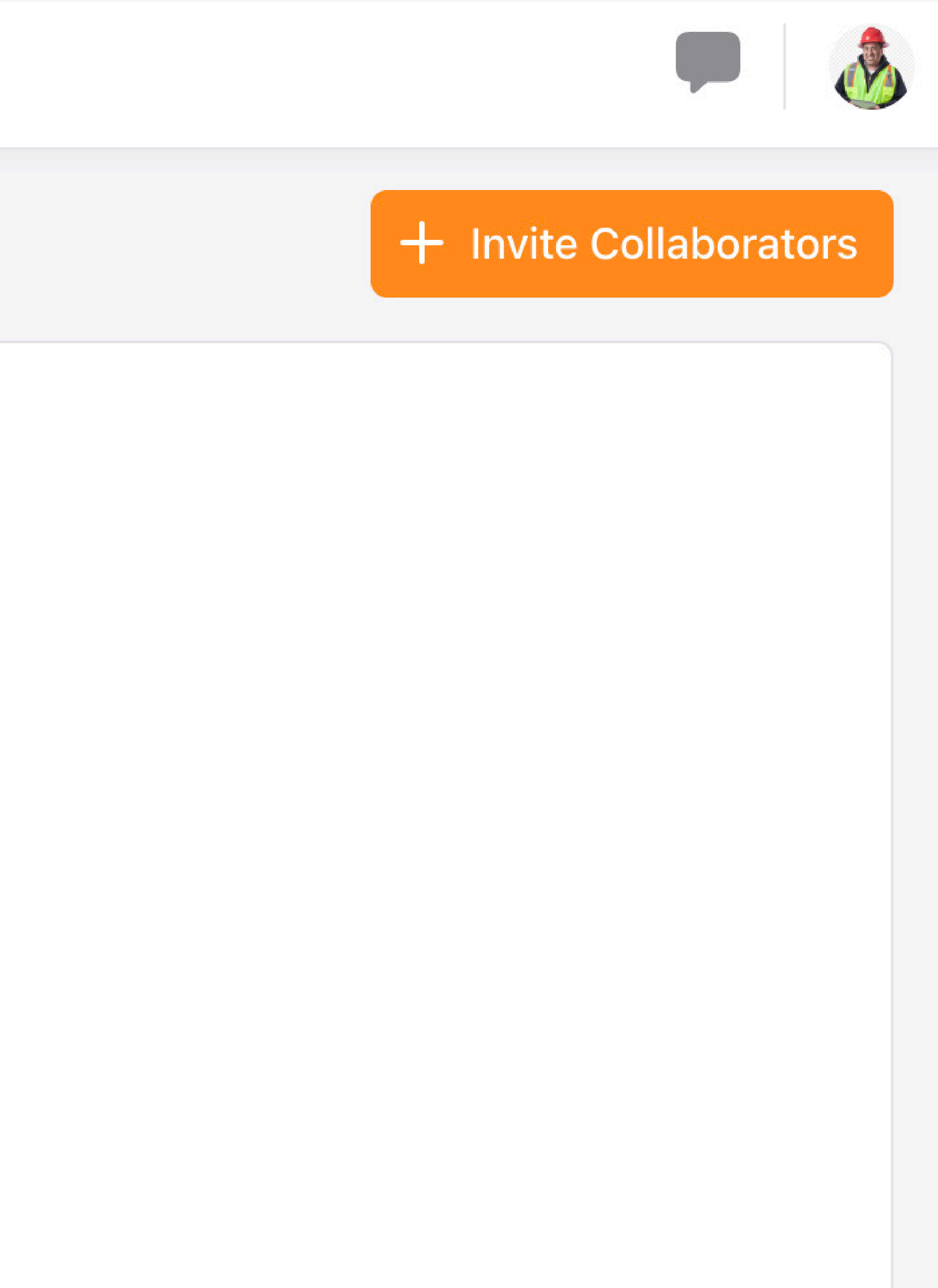
Option 2: From the Projects tab

From the Projects tab, select a project.

You can then add team members by clicking the blue button with the + icon in the upper right of the screen.

Or, you can select Project Directory from the sidebar and add team members or workers in their respective sections.





Invite collaborators.

You can also invite people outside your company (like subcontractors) to Raken. Collaborators can only see their own activity.

In the Project Directory, select Collaborators. Click the orange + Collaborators button to add their info and automatically send an invite.

Congratulations!
You’ve just set up your first project.

Get a live walkthrough

Let us walk you through our platform and help configure your first projects.

Schedule Demo

More self-guided training

Search our help articles and tutorials.

Raken Help Center