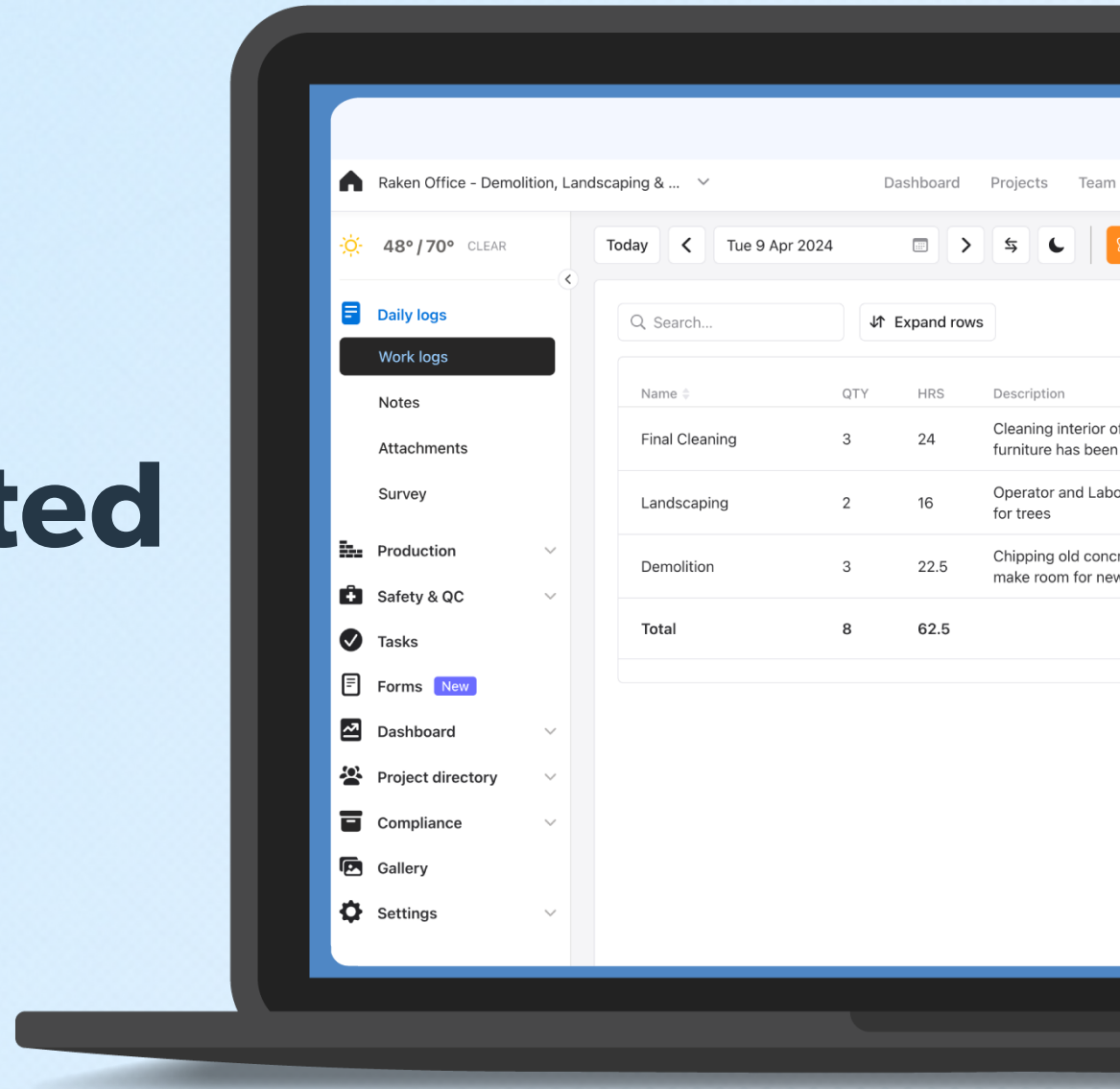




Getting Started with Raken

Web App



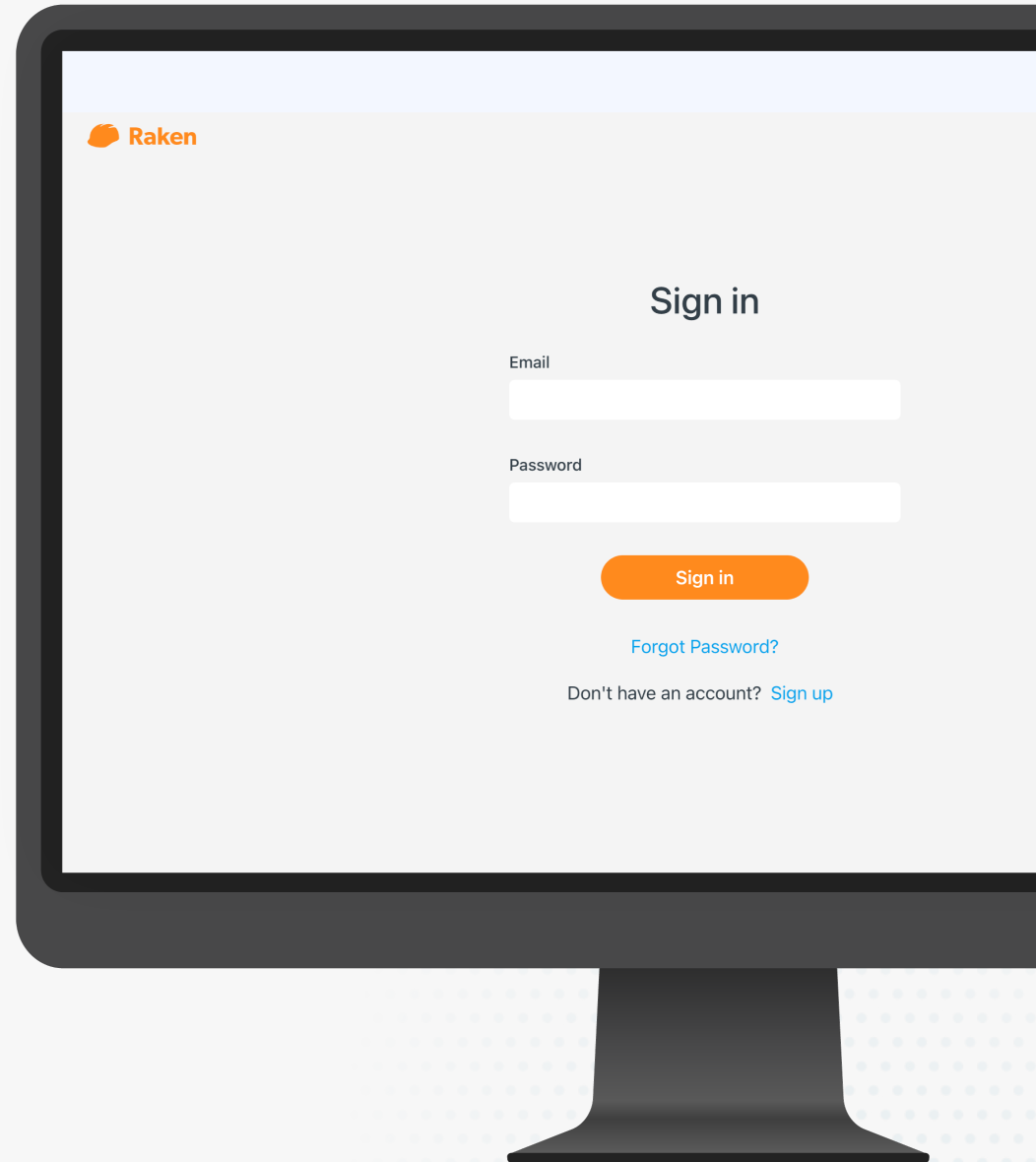
- 01.** Explore the dashboard
- 02.** Create a project
- 03.** Customize your project
- 04.** Invite team members

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Log in at rakenapp.com

Raken Tips

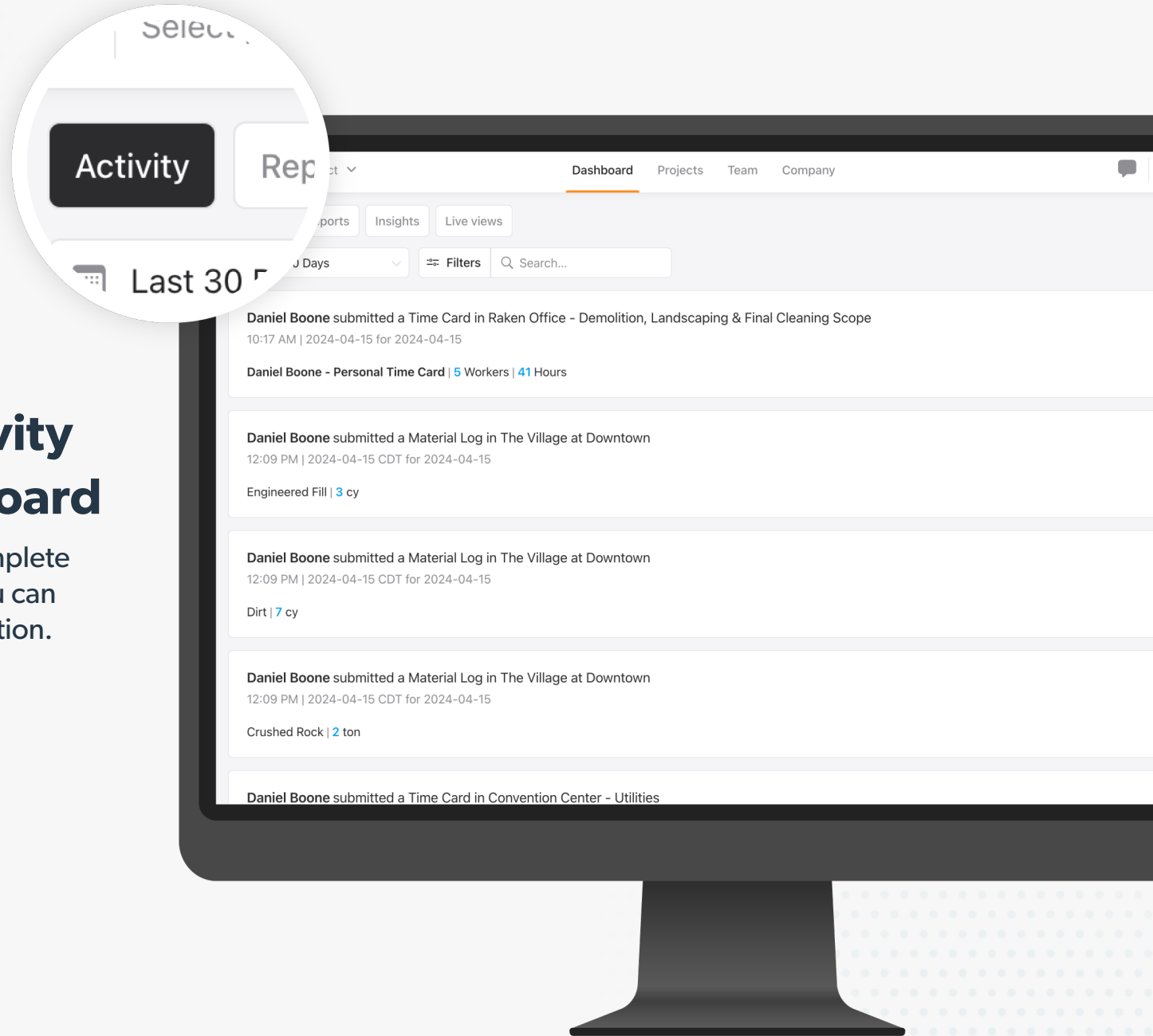
To add real data to your trial projects,
download the Raken app for mobile field
reporting.



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.



Select project 

Dashboard

Pro

Activity

Reports

Insights

Live views



Last 30 Days 



Filters



Search...

Daniel Boone submitted a Time Card in Raken Office - Demolition, Land

10:17 AM | 2024-04-15 for 2024-04-15

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.

Dashboard

Projects

Team

Company

ews

Q Search...

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.)

Projects

+ New project











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.

New project ✕

Name <input type="text" value="Name this project"/>	Job # <input type="text" value="Job #"/>
Search address <input style="width: 90%;" type="text" value="Search address"/> 🔍	Street address <input style="width: 90%;" type="text" value="Street address"/> ⋮
City <input type="text" value="City"/>	State <input type="text" value="State"/>
Zip code <input type="text" value="Zip code"/>	Country <input type="text" value="United States"/>
Project start date <input style="width: 90%;" type="text" value="2024-04-22"/> 📅	Project end date <input style="width: 90%;" type="text" value="YYYY-MM-DD"/> 📅
Project groups <input type="text" value="Search groups"/>	
Project template <input style="width: 90%;" type="text" value="Default Template Company Default Template"/> ▾	











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

☁️ 56° / 64° PARTLY CLOUDY

Today < Mon 22 Apr 20

-  Daily logs
- Work logs**
- Notes
- Attachments
- Survey
-  Production
-  Safety & QC
-  Tasks
-  Forms New
-  Dashboard
-  Project directory
-  Compliance
-  Gallery
-  Settings

🔍 Search...

Name	QT
Landscaping	0
Demolition	0
Final Cleaning	0
Crew	0
Daniel Mendez - Personal Time Card	0
Joseph Colucci - Personal Time Card	0
Total	0

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.

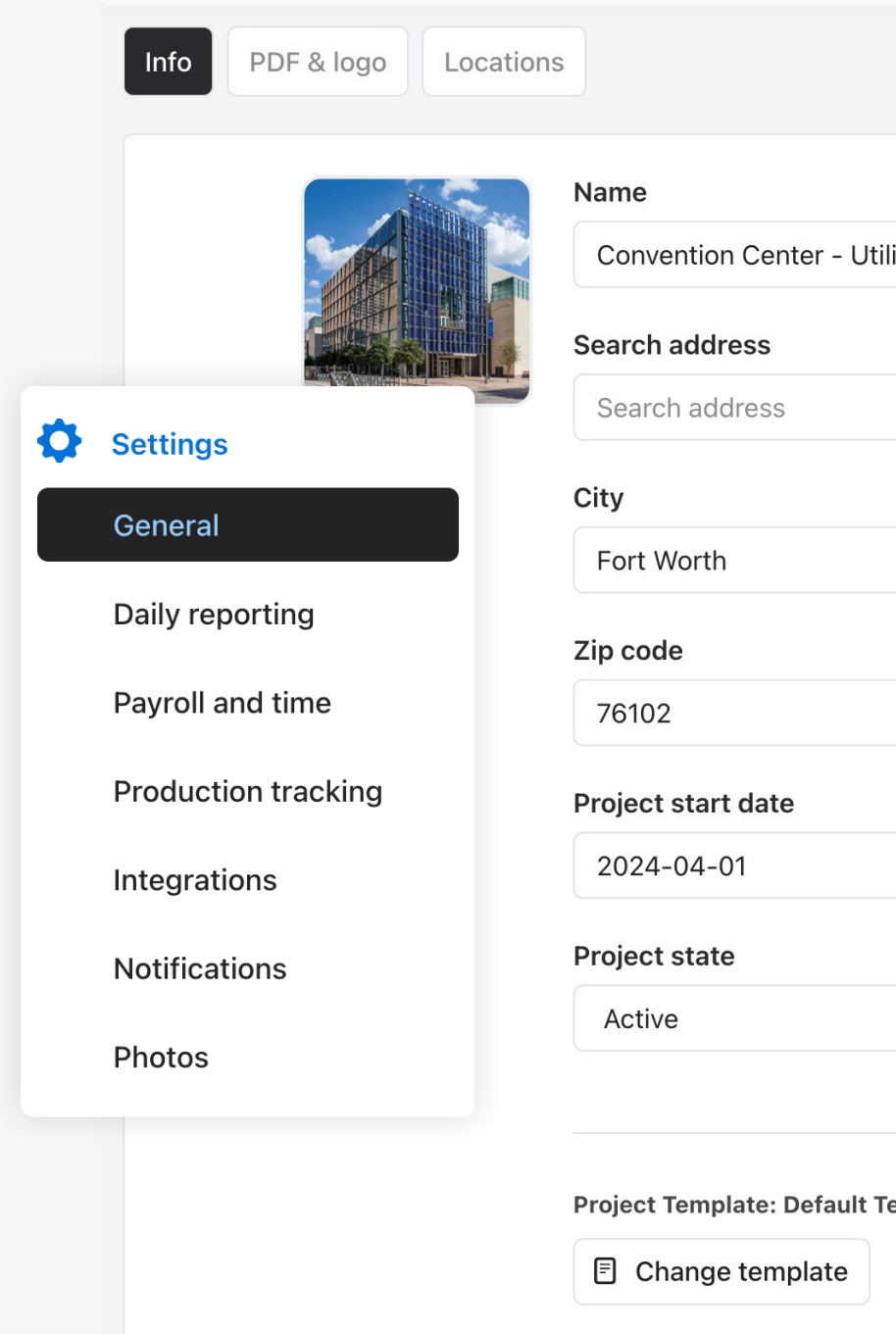
Production tracking - Add cost codes, material and budgets.

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.



The screenshot shows a project details page for a "Convention Center - Utili". The page has three tabs at the top: "Info" (selected), "PDF & logo", and "Locations". Below the tabs is a photo of a modern building. To the right of the photo are form fields for "Name" (Convention Center - Utili), "Search address" (Search address), "City" (Fort Worth), "Zip code" (76102), "Project start date" (2024-04-01), and "Project state" (Active). At the bottom right, there is a "Project Template: Default Te" label and a "Change template" button. A settings menu is overlaid on the left side of the page, featuring a gear icon and the title "Settings". The menu items are: "General" (highlighted with a dark background), "Daily reporting", "Payroll and time", "Production tracking", "Integrations", "Notifications", and "Photos".

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.

Info **PDF & logo** Locations Reset Save


Upload your project logo and select your brand color

Company defaults Custom settings


Brand color



Sample Project

140 N Main St. Los Angeles, CA 90210 

Monday, Oct 2016 Job # 123456 Prepared By John Doe



Weather


6:00 PM	12:00 PM	4:00 PM
76° Cloudy	92° Sunny	89° Cloudy
Wind 3 mph Precipitation: 0% Humidity 65%	Wind 3 mph Precipitation: 0% Humidity 65%	Wind 3 mph Precipitation: 0% Humidity 65%

Work Logs

Notifications

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

The screenshot shows a web application interface. At the top, there is a navigation bar with the text 'The Village at Downtown' and a dropdown arrow. To the right of this are links for 'Dashboard', 'Projects', 'Team', and 'Company'. In the top right corner, there is a chat icon and a user profile icon. The left sidebar contains a menu with the following items: 'Daily logs', 'Production', 'Safety & QC', 'Tasks', 'Forms' (with a 'New' badge), 'Dashboard', 'Project directory', 'Compliance', 'Gallery', 'Settings' (highlighted with a blue gear icon), and 'Photos'. Under 'Settings', there are sub-items: 'General', 'Daily reporting', 'Payroll and time', 'Production tracking', 'Integrations', 'Notifications' (highlighted with a dark background), and 'Photos'. The main content area features a search bar with the text 'Search...'. Below the search bar is a table with the following columns: 'Name', 'Email', 'Phone', 'Safety', 'Delays', and 'Missed reports'. The table contains one row for 'Daniel Boone' with the email 'db@rakentest.com' and phone number '619-000-0000'. There are three checkboxes in the 'Safety', 'Delays', and 'Missed reports' columns, all of which are currently unchecked.

Name	Email	Phone	Safety	Delays	Missed reports
 Daniel Boone	db@rakentest.com	619-000-0000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

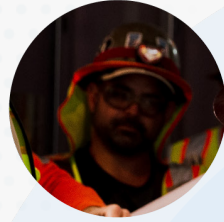
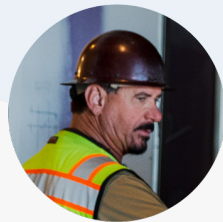
Invite team members ✕

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.

The screenshot displays a web dashboard interface for managing team members. The top navigation bar includes a home icon, a 'Select project' dropdown, and menu items for 'Dashboard', 'Projects', 'Team', and 'Company'. The 'Team' menu item is highlighted. Below the navigation bar, there are two tabs: 'Team members' (selected) and 'Workers'. A filter bar contains three filters: 'Active + 1', 'Filter by classification', and 'Filter by role'. To the right of the filters are a search bar, a 'Labor map' button, a 'Bulk actions' dropdown, and an orange '+ Team members' button. The main content area features a table with the following columns: First name, Last name, EID, Email, Phone, Role, Status, Last active, and Updated. The table contains one entry for Daniel Boone, an Account Administrator with an 'Active' status, last active on 2024-04-15, and updated on 2024-04-17.

<input type="checkbox"/>	First name	Last name	EID	Email	Phone	Role	Status	Last active	Updated	
<input type="checkbox"/>	Daniel	Boone	-	db@rakentest.com	619-000-0000	Account Administrator	Active	10:08 AM on 2024-04-15	2024-04-17	...

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.

The screenshot shows a software interface with a top navigation bar containing 'Dashboard', 'Projects', 'Team', and 'Company'. On the right side of the navigation bar, there is a chat icon and a user profile icon. Below the navigation bar is a toolbar with icons for a calendar, navigation arrows, a double arrow, a moon, and an orange 'Sign In' button. To the right of the 'Sign In' button are three blue buttons: one with a person icon and a plus sign, one with a paper plane icon, and one labeled 'Reports' with a dropdown arrow. Below the toolbar is a table with columns for 'HRS', 'Description', 'Cost codes', and 'Attachments'. The table has three rows, each with '0' in the 'HRS' column and '-' in the 'Description' column. A tooltip with the text 'Add member' is positioned over the person icon button in the toolbar. Below the table, there are buttons for 'Expand rows', 'Role', 'Time card', and a dropdown arrow.

Dashboard Projects Team Company

Calendar > ⇌ Moon Sign In + Person Paper Plane Reports

Expand rows Role Time card

HRS	Description	Cost codes	Attachments
0	-		⋮
0	-		⋮
0	-		⋮



+ Invite Collaborators

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](#)