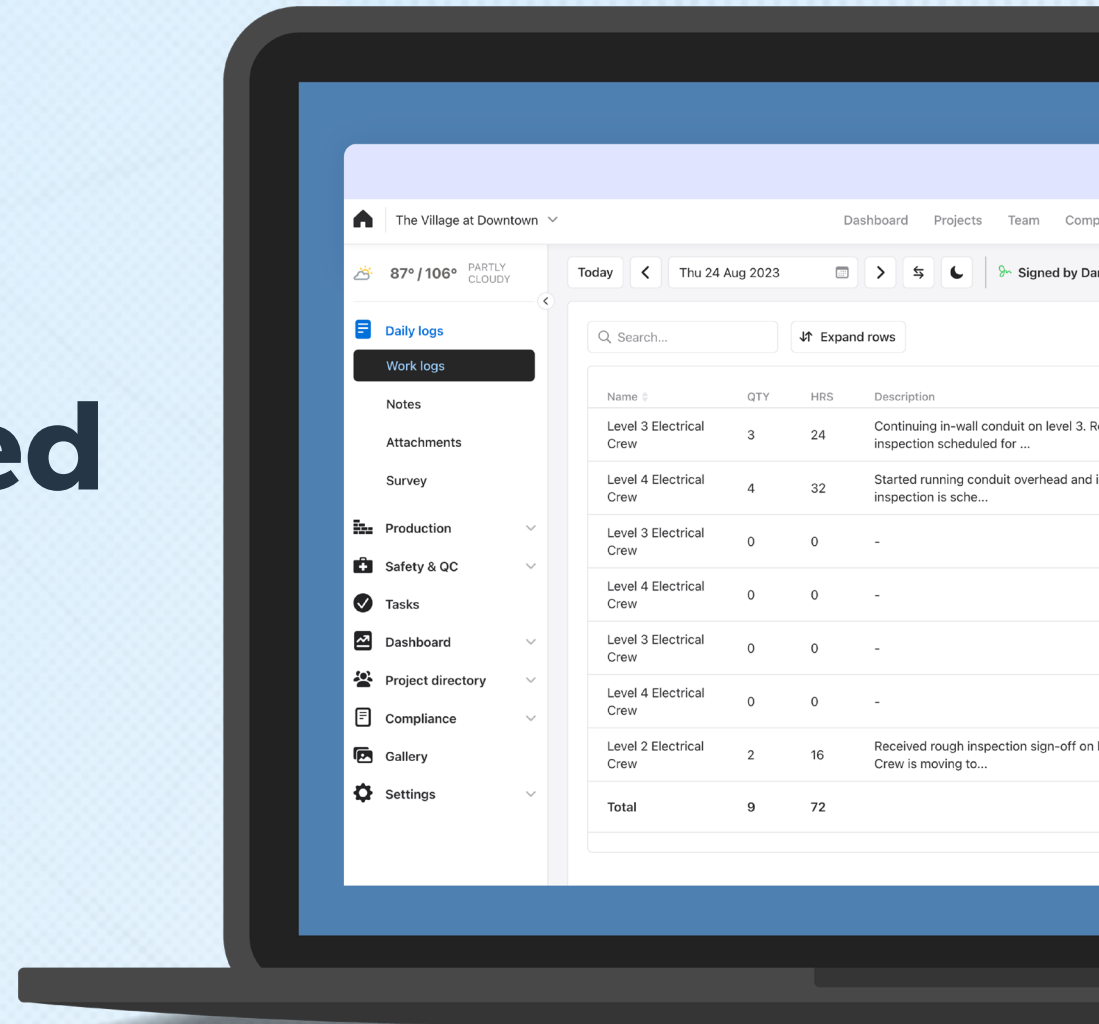




# Getting Started with Raken

Web App





## More resources



[Support articles](#)



858-290-4477



[hello@rakenapp.com](mailto:hello@rakenapp.com)



# TABLE OF CONTENTS

- 01.** Exploring the Dashboard
- 02.** Creating a project
- 03.** Customizing a project
- 04.** Inviting team members to a project



# Exploring the Dashboard

# Explore the Dashboard

First, sign in to Raken's web app. You'll be taken to your Dashboard, where you'll see a real-time feed of your projects.



Select project ▾

Dashboard

Projects

Team

Company



Activity

Reports

Insights

Live Views



Last 30 Days ▾



Filters



Search...

**Jimmy Hess** submitted a Time Card in Convention Center

4:51 PM | 2023-05-25 CDT for 2023-05-18

**Painting** | 3 Workers | 24 Hours

Prime and first coat walls and soffits on 5th floor hallways and rooms.

**Jimmy Hess** submitted a Time Card in Convention Center

4:51 PM | 2023-05-25 CDT for 2023-05-19

**Painting** | 3 Workers | 24 Hours

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4:51 PM | 2023-05-25 CDT for 2023-05-22

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4:51 PM | 2023-05-25 CDT for 2023-05-23

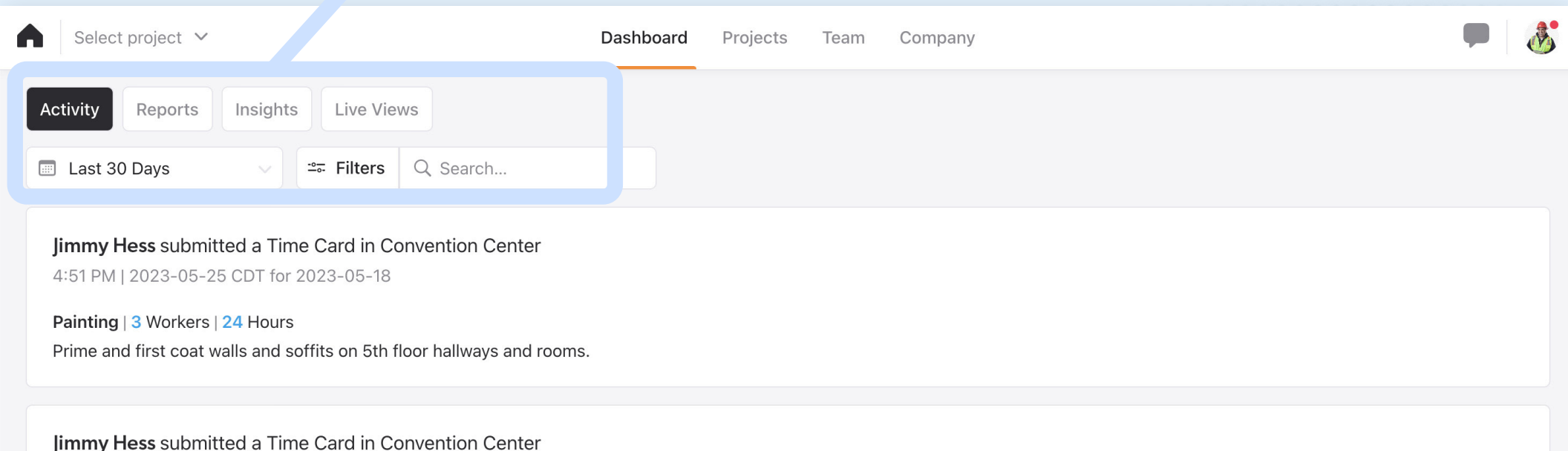
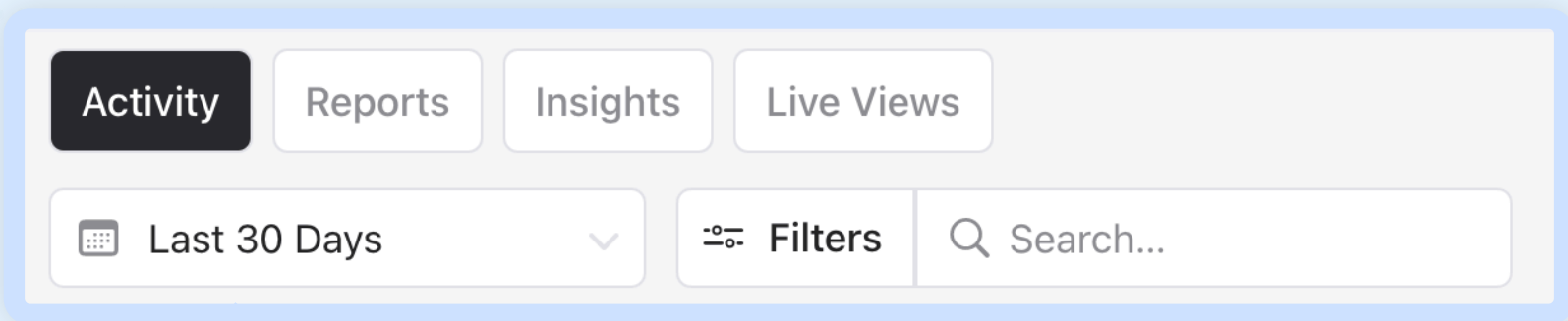
# Check out the tabs in the top left of your screen.

**Activity** shows a full overview of all your projects.

**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 our workforce management tools.

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

Dashboard

Projects

Team

Company

Dashboard

Projects

Team

Company



Activity

Reports

Insights

Live Views

Last 30 Days

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Prime and first coat walls and soffits on 5th floor hallways and rooms.

The background features several overlapping circles in light blue and white. Some of these circles are filled with a fine halftone dot pattern. The text is centered in a bold, dark blue font.

# **Creating 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 it later.

## New project

Name

Job #

Search address



Street address

City

State

Zip code

Country

Project start date



Project end date

Project 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** - Access automated production insights

**Safety & QC** - Create and assign custom checklists and review observations

**Tasks** - Create, assign, and review tasks

**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

**Check out our support center for detailed guides to all our features.**



University Towers Office Building ▾



58° / 85°

PARTLY CLOUDY

Today



Wed 6 Sep 2



Daily logs

Work logs

Notes

Attachments

Survey



Production ▾



Safety & QC ▾



Tasks



Dashboard ▾



Project directory ▾



Compliance ▾



Gallery



Settings ▾

Search...

Name ▾

Jimmy Hess

Chris Smith

DK Elevators

Chief Masonry

Triton Concrete

Total



# **Customizing a project**

# Customize a project

Click Settings in the left sidebar. Here, you can add project info and customize the way your reports look and feel.

## You can also set up:



Automatic notifications

Segments (to allow multiple daily reports for one project)

Integrations (with your accounting software, cloud storage system, and more)


### Raken tip

Have multiple projects? Create a Project Template to save and use the same settings.

 Select project 

DashboardProjectsTeamCompany



InfoRoles & PermissionsProject TemplatesProductionChecklistsToolbox TalksIntegrationsBilling

  
Add logo

**Company name**

Steve Bable Construction

**Company phone**

 +1 (831) 521-0205 


**Company Email**

brian.poage+20@rakenapp.com


**CC Emails**

Additional company email addresses


**Industry**

Select an option 


**Sub industry**

Select an option 


**Employee range**

Select an option 

**Search address**

Search address 

**Street address**

5600 Avenida Encinas 

**City**

Carlsbad

**State**

California

**ZIP Code**

92011





# Notifications

Click Notifications in the Settings submenu in the sidebar to choose who gets alerts for safety, delays, and missed reports.

X

Team / Jimmy Hess 

Active

Info

Attributes

Projects

Certifications

Notifications

Tasks

Email Preferences

Q Search...

Project	Safety	Delays	Missed Reports
Downtown Commons	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Desert Plaza	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
University Towers Office Building	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>





# **Inviting team members to a project**

# Build your workforce

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

## Option 1: From the Team tab

Click Team from the top menu. Select the worker's name from the list (or use the orange "+ Team Members" button to add them).

Select the workers you need to add to the project by clicking the check box in front of their names. Once they're selected, click the "... " button to select Add to projects.

Within the popup window, add the selected team members to all active projects or to specific ones.

### Raken tip

The first time you log in, use the Get Started menu to download the Workers.CSV template. Fill it out with your team's info, and bulk upload team members all at once.



Select project ▾

Team Members

Workers

☰ Active ▾

☰ Filter by classification ▾

🔍 Search

<input type="checkbox"/>	First Name ↕	Last Name ↕	Ellipsis
<input type="checkbox"/>	Chris	Boyd	-
<input type="checkbox"/>	Chris	Garcia	-
<input type="checkbox"/>	Chris	Smith	-
<input type="checkbox"/>	Jimmy	Flores	-



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

University Towers Office Building ▾
 Dashboard Projects Team Company

61° / 80° PARTLY CLOUDY
 Search... Import Add Workers

- Daily logs ▾
- Production ▾
- Safety & QC ▾
- Tasks ✓
- Dashboard ▾
- Project directory**
- Team members
- Workers**
- Collaborators
- Compliance ▾
- Gallery

First Name ⬆	Last Name ⬆	EID ⬆	Email ⬆	Phone ⬆	Classification ⬆	Updated ⬆	
Chris	Boyd	-	-	-	Assistant Superintendent	2023-09-12	⋮
Chris	Smith	-	-	-	Assistant Superintendent	2023-09-12	⋮

# Invite collaborators.

You can also invite people outside your company (like subcontractors) to Raken. These 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.

**Invite team members** ×

First Name	Last Name	Email (Username)	EID (Optional)	Phone Number (Optional)	Role
<input type="text" value="First"/>	<input type="text" value="Last"/>	<input type="text" value="Email"/>	<input type="text" value="EID"/>	<input type="text" value="🇺🇸 +1"/>	<input type="text" value="Role"/> <span>▼</span>

**Add a personal message**

Cancel Next

**Invite collaborators** ×

Email (Username)	First Name	Last Name	Company
<input type="text" value="Email"/> <span>...</span>	<input type="text" value="First"/>	<input type="text" value="Last"/>	<input type="text" value="Search Companies"/>

**Add a personal message**

Cancel Send



# **Want to learn how Raken works best for your company?**

Our team is happy to help walk you through the platform—and  
configure all your projects—so you can get more done.

[Schedule a Demo](#)