

**RIVET**

# Launching RIVET

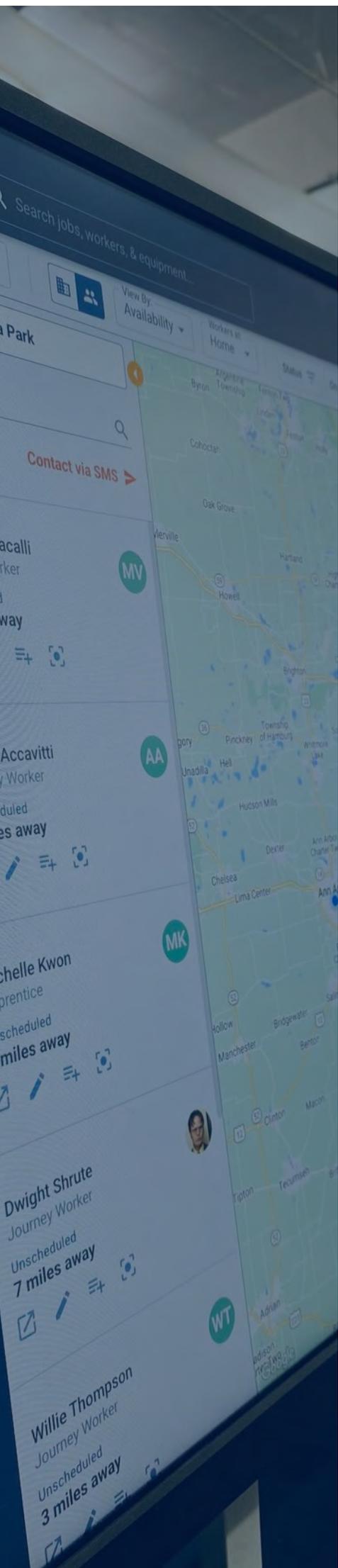
This guide is best for:

## **Operations Leaders → RIVET Admin users**

- How to explain RIVET to your team
- How to map your existing workflows and processes into RIVET
- Onboarding and training with the RIVET Customer Success Team
- How to set up your RIVET account for admin users
- Top tips for getting the most out of RIVET

Launching RIVET requires a bit of planning, but that doesn't have to be complicated (or stressful!). This guide is crafted by our customer experience team who regularly coach field operations directors, schedulers, project managers and field leaders as they deploy RIVET at their organizations.

**Keep this guide handy for future reference, especially if your team changes, so you can seamlessly keep your RIVET account up to date.**



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## THE FUNDAMENTALS

# RIVET is Labor Ops software for construction contractors

Before rolling out RIVET to your company, it's important that you articulate to others exactly what RIVET is.

**At its core, RIVET is a Labor Ops software platform for construction contractors that streamlines labor forecasting, scheduling and communication to maximize labor utilization and help you grow your business.**

RIVET also has the ability to integrate with the tools and applications that are already in your tech stack. RIVET integrates with accounting, ERP and payroll apps you're familiar with, like Sage, ComputerEase, Foundation and Viewpoint Vista or Spectrum, increasing ROI for those existing applications, and decreasing context-switching for users when you bring them all into RIVET.

RIVET brings all of your worker and job data together online. **It looks and feels familiar to your processes today but is greatly enhanced with what we call "Digital Views".**

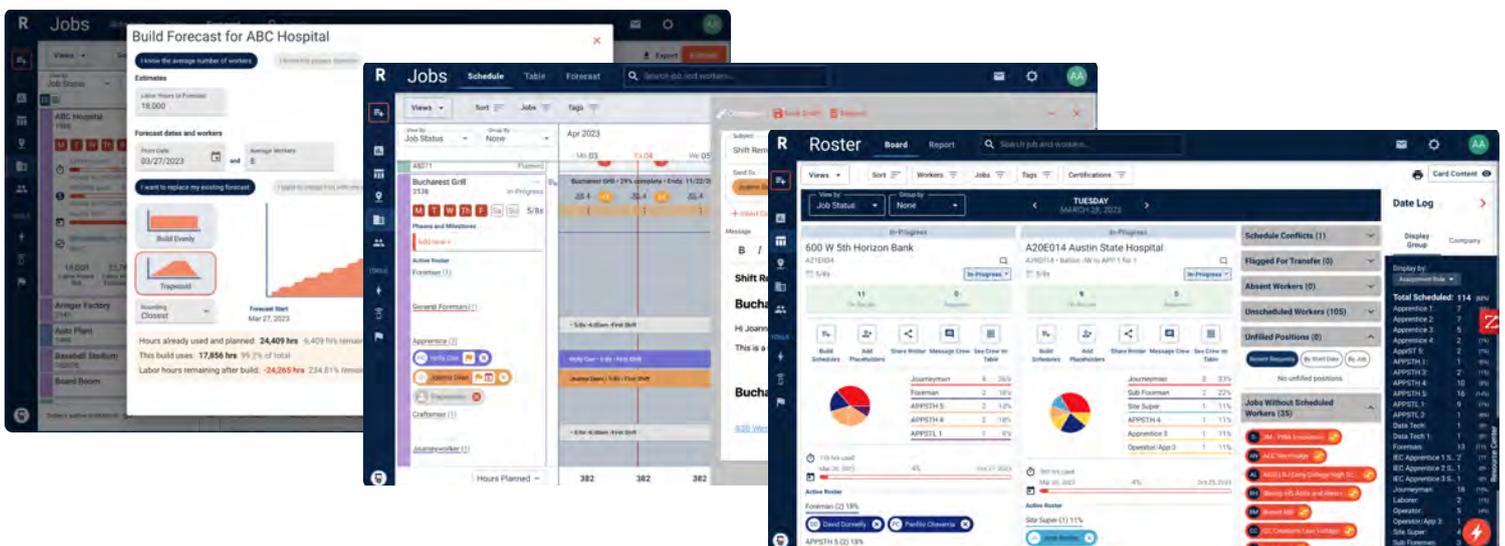
## THE FUNDAMENTALS

# Digital Views enhance your existing workflows

Digital Views give you so much more than the spreadsheets or magnet boards you've had before. They unlock new capabilities, like access to your entire workforce where you can quickly see skills, contact info and assignments, all from your phone, or any device. **Your labor forecasting, scheduling and dispatching workflows become simple, connected and fun.**

Your schedules go from rows on a spreadsheet to interactive gantt charts where you can make bulk assignment changes. Your white boards transform into Digital Roster Boards with new insights on labor utilization. All of this increases transparency because all job assignment history is tracked and viewable by your back office team in a shared Action Log.

Take the time to learn RIVET's features, and you won't regret the ramp up time.



# How to map your existing workflows into RIVET

RIVET is specifically designed for companies who perform commercial and industrial work. We've worked with hundreds of contractors to understand and fine-tune the most common configurations in RIVET that best map to existing processes in the back office.

The next pages of worksheets represent the most common ways operations team members translate their processes into RIVET, and the benefits of doing so at every step.

Worksheets included for mapping the following workflows:

- Workforce Data Management
- Jobs Data Management
- Labor Forecasting
- Labor Scheduling
- Field Communication

# Worksheet: Mapping Workforce Data Management

Workforce Data Management tasks are typically performed by **Safety, HR, Schedulers, Accounting, or Payroll teams**. Workforce Data Management is the record keeping of data that relates to employment status, contact information, certifications and qualifications, attendance, and labor rate.

## Manage worker certifications and trainings

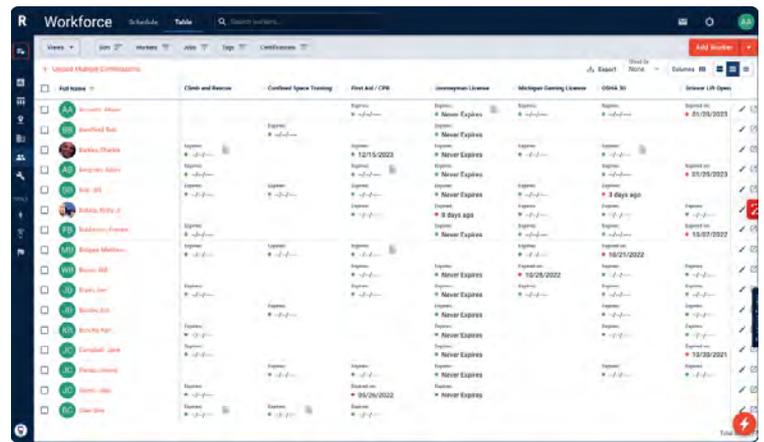
Today: You may maintain this daily in a spreadsheet.

### WITH RIVET:

- Bulk import or integrate your certifications into your RIVET Workforce.
- Certification names, images and dates are added to Worker Profiles.

### BENEFITS:

- Consolidated Worker Profiles.
- Expiring certifications report.
- Bulk editing and image upload.
- System integrations.



[Learn more](#)

## Contact information and qualifications

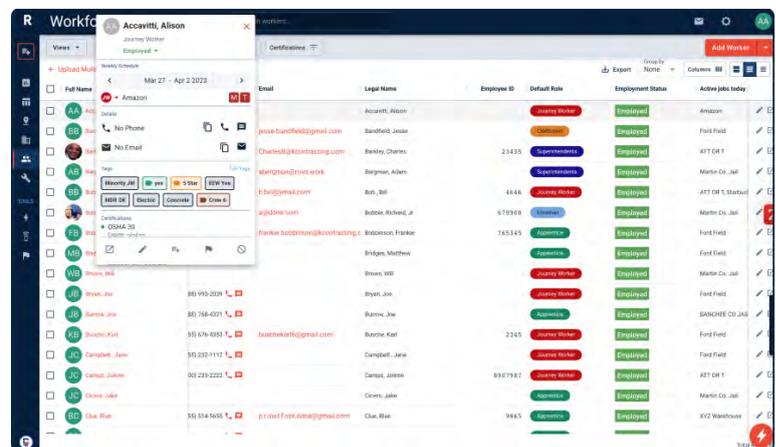
Today: You may maintain daily this in an accounting or ERP, or on another spreadsheet.

### WITH RIVET:

- Bulk import or integrate your workforce data into your RIVET Workforce.
- Use tags to track and sort additional worker attributes.

### BENEFITS:

- Consolidated Worker Profiles that are always up to date.
- Quick access from mobile devices in the field.
- System integrations.



[Learn more](#)

# Worksheet: Mapping Workforce Data Management

Worksheet continued.

## Employment status, assignment history

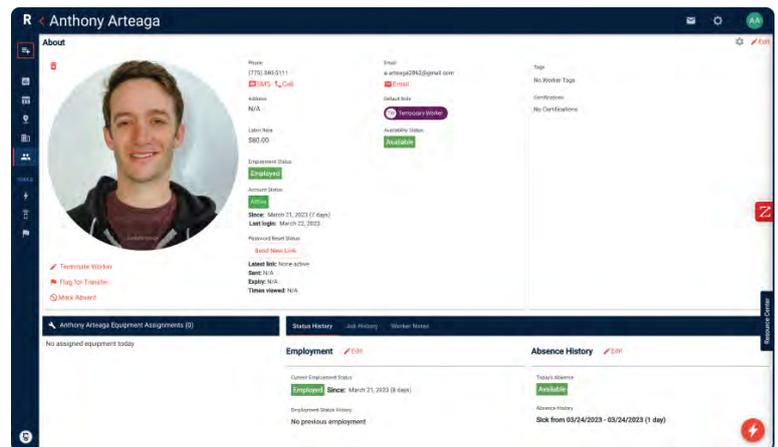
Today: You may maintain this daily in an accounting or ERP system, or on another spreadsheet.

### WITH RIVET:

- Automatically track employment and assignments in Worker Profiles, including the changes as they occur.
- Can quickly filter between your entire active and inactive workforce in RIVET's Workforce Table.

### BENEFITS:

- Consolidated Worker Profiles.
- Automated record keeping.
- System integrations.



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## Planned absences

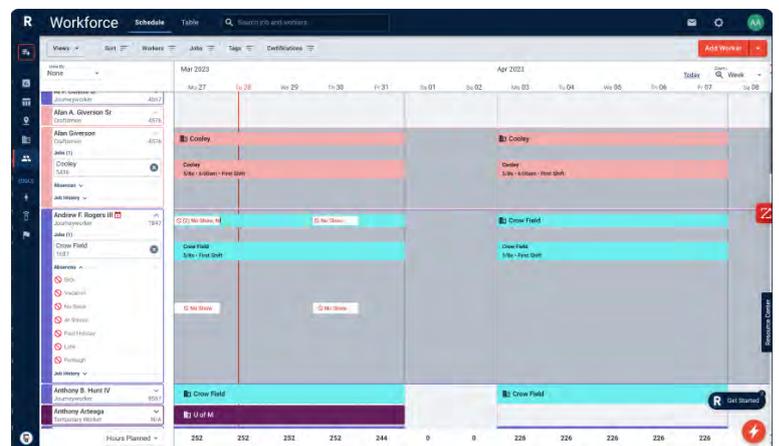
Today: You may track this in spreadsheets or your ERP and update daily from emails, calls, texts.

### WITH RIVET:

- Update planned absences on the fly.
- Can see absences on the same schedule view as your job sites to monitor labor utilization.
- Can mark a worker late or sick from the field and have a historical record in the Worker Profile.

### BENEFITS:

- Automated record keeping.
- Consolidate view of job schedules and availability.



[Learn more](#)

# Worksheet: Mapping Workforce Data Management

Worksheet continued.

## Labor rates

Today: You may be recording labor rates as needed in accounting or ERP system, or storing in a personnel file.

### WITH RIVET:

- Bulk edit workers to change labor rates for large numbers of workers at the same time.
- Save default labor rates, then customize by role or individual worker.
- Use system integration to sync your labor rates to avoid double data entry.

### BENEFITS:

- Reduce redundant information.
- Have all vital workforce information stored in RIVET so you can move faster and get more done.

The screenshot displays the 'Manage Organization' interface in RIVET. It features a dark blue header with the 'R' logo and 'Manage Organization' text. A sidebar on the left contains various tool icons. The main content area lists four roles with their respective configurations:

- Field Leader:** Permission Level: Field Leader. Description: workers to jobs and update job statuses. Does not have the ability to view Job Start and End Dates. Default Labor Rate: \$ 110.0000.
- General Foreman:** Permission Level: Field Leader. Description: Has access to: Assigned Job Pages and all job page features, plus the ability to check in workers to jobs and update job statuses. Does not have the ability to view Job Start and End Dates. Default Labor Rate: \$ 110.0000.
- Temporary Worker:** Permission Level: Worker. Description: Has access to: Assigned Job Pages with the ability to Check in, read the Job Feed and edit Job Tasks. Does not have the ability to post to Job Feed, view the Job Start and End Dates or view the Job Roster. Default Labor Rate: \$ 80.0000.
- Apprentice:** Permission Level: Worker. Description: Has access to: Assigned Job Pages with the ability to Check in, read the Job Feed and edit Job Tasks. Does not have the ability to post to Job Feed, view the Job Start and End Dates or view the Job Roster. Default Labor Rate: \$ 55.0000.

Each role entry includes a 'Permissions' link, a 'Make this role schedulable' toggle, and an 'Add this role on new jobs' toggle. A 'Tools' section is visible at the bottom left of the interface.

[Learn more](#)

# Worksheet: Mapping Job Data Management

Job Data Management tasks are typically performed by **Project Managers or Service Foremen**. Job Data Management is the record keeping of data that relates to job status, job details, location, project timeline, phases, work in progress and field notes.

## Track work in progress numbers, labor rates, blended rates

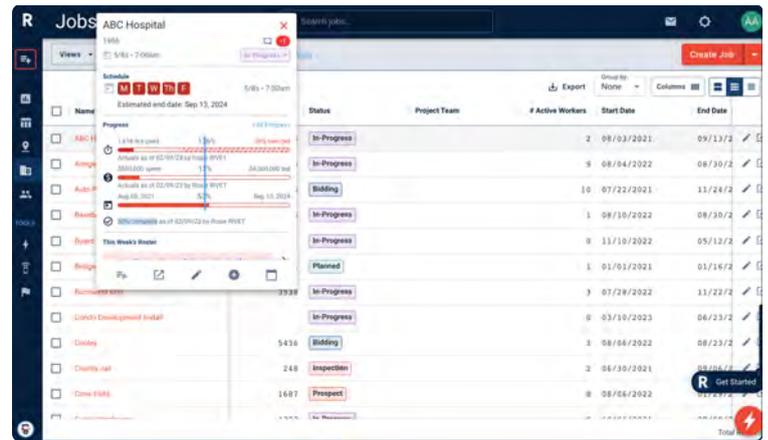
Today: You may track these weekly in other systems or spreadsheets.

### WITH RIVET:

- Update or sync your materials budget / actuals, contract amount and job progress estimate to see quick WIP progress bars.
- Store labor rates in RIVET so you don't have to re-enter those every time.
- Automatically calculate blended rates per job.

### BENEFITS:

- Extremely quick access to WIP details.
- System integrations.
- Computed blended rates and stored labor rates across the organization.
- Customizable interface to highlight the data you wish to see for each job.



Name	Status	Project Team	# Active Workers	Start Date	End Date
ABC Hospital	In-Progress		2	09/03/2021	09/13/22
Aringer Factory	In-Progress		9	08/04/2022	08/30/22
Auto Plant	Bidding		10	07/22/2021	11/24/22
Baseball Stadium	In-Progress		1	08/10/2022	08/30/22
Board Room	In-Progress		8	11/10/2022	05/12/22
Bridgestone Tower	Planned		1	01/01/2021	01/16/22
Bucharest Grill	In-Progress		3	07/29/2022	11/22/22
Condo Development Install	In-Progress		9	03/10/2022	04/23/22
Cooley	Bidding		3	08/08/2022	08/23/22
County Jail	Inspection		2	08/30/2021	
Crow Field	Prospect		8	08/08/2022	
Culco Warehouse					

[Learn more](#)

## Job status updates

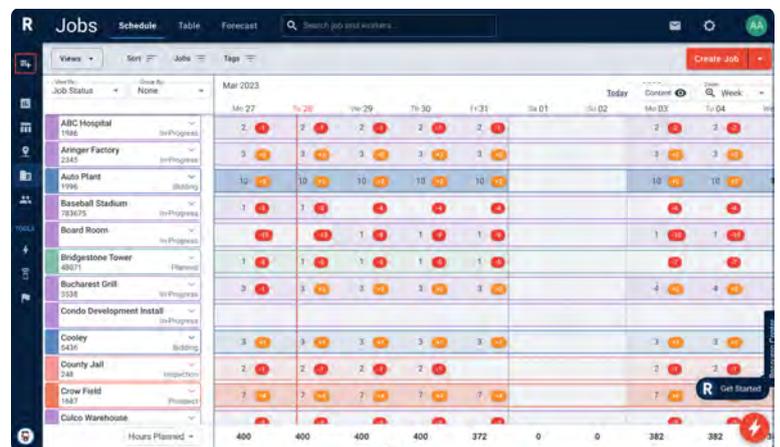
Today: You take calls, texts or emails at all hours, keeping track of moving pieces from memory.

### WITH RIVET:

- Field leaders are able to convey status updates in real time across the whole organization.
- Sort jobs by status for a quick view of priorities.

### BENEFITS:

- Less miscommunication.
- Faster updates.
- Less downtime and over-scheduled jobs.
- Save time and money.



Job	Mar-27	Mar-28	Mar-29	Mar-30	Mar-31	Apr-01	Apr-02	Apr-03	Apr-04
ABC Hospital	2	2	2	2	2				
Aringer Factory	3	3	3	3	3				
Auto Plant	10	10	10	10	10				
Baseball Stadium	1	1	1	1	1				
Board Room	1	1	1	1	1				
Bridgestone Tower	1	1	1	1	1				
Bucharest Grill	3	3	3	3	3				
Condo Development Install	3	3	3	3	3				
Cooley	3	3	3	3	3				
County Jail	2	2	2	2	2				
Crow Field	7	7	7	7	7				
Culco Warehouse									

[Learn more](#)

# Worksheet: Mapping Labor Forecasting

Labor Forecasting tasks are typically performed by **Project Managers or Ops Leaders**. Labor Forecasting predicts how many hours a company needs to work in the future to meet its objectives. Forecasting helps balance customer demand, profitability and worker satisfaction by avoiding over/under-staffing and scheduling labor hours to meet these needs.

## Build out long-term labor forecasts by project

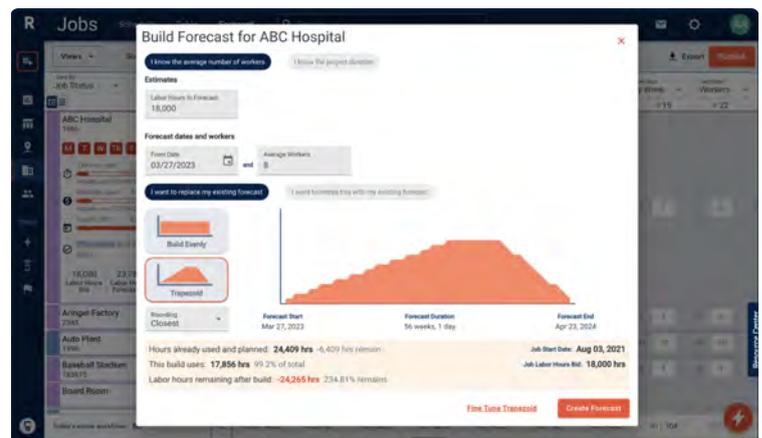
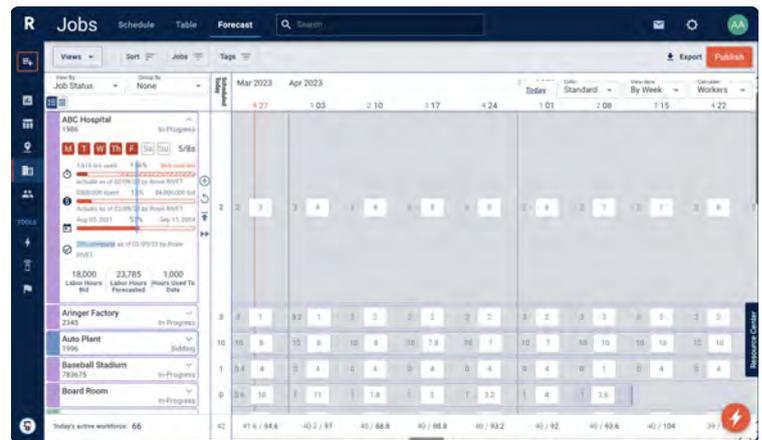
Today: Your project managers are forecasting individually, in different formats, monitoring labor utilization manually.

### WITH RIVET:

- Have a more accurate depiction of labor needs.
- Build out labor projections using a bell curve builder.
- Build curves based on project duration or average number of workers.
- Distribute labor evenly or with a curve reflecting ramp up, peak and ramp down periods.
- Publish forecasts so they are viewable by schedulers who can assign crews based on needs.

### BENEFITS:

- Seamless workflow between forecasting and scheduling.
- Forecast long term labor needs for the organization.
- Clear visibility of labor trajectory across organization.
- Dictate when to hire and when labor needs to be reduced.



[Learn more](#)

# Worksheet: Mapping Labor Forecasting

Worksheet continued.

## Know when to bid more jobs and if you have enough work for labor.

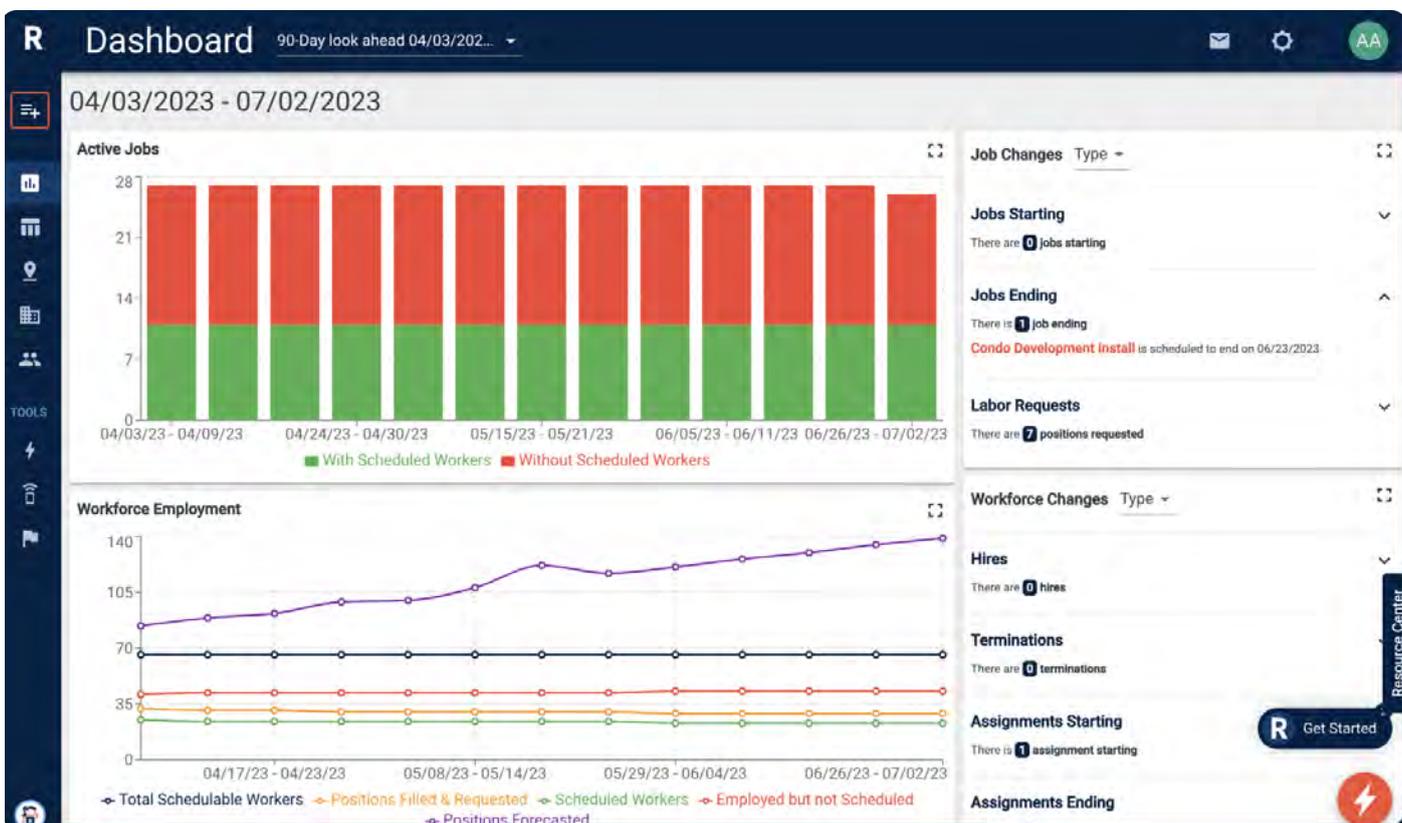
Today: You may have a short-term view of upcoming labor needs, creating missed opportunities by not forecasting into the future.

### WITH RIVET:

- Use RIVET's Dashboard to see when more jobs need to be bid.
- Use RIVET's Dashboard to see when there are too many workers on staff.
- Stay closer to budgets and goals set for the month/quarter/year.

### BENEFITS:

- Stay on time and under budget by knowing what labor is needed at what times.
- Exceed goals by hiring only the labor that's needed for the jobs that are being scheduled.



[Learn more](#)

# Worksheet: Mapping Labor Scheduling

Labor Scheduling tasks are typically performed by **Schedulers, Superintendents or Field Ops Leaders**. Labor Scheduling is creating, updating and reviewing field labor schedules, by assigning the right people at the right time, based on forecasted hours.

## Weekly labor meeting

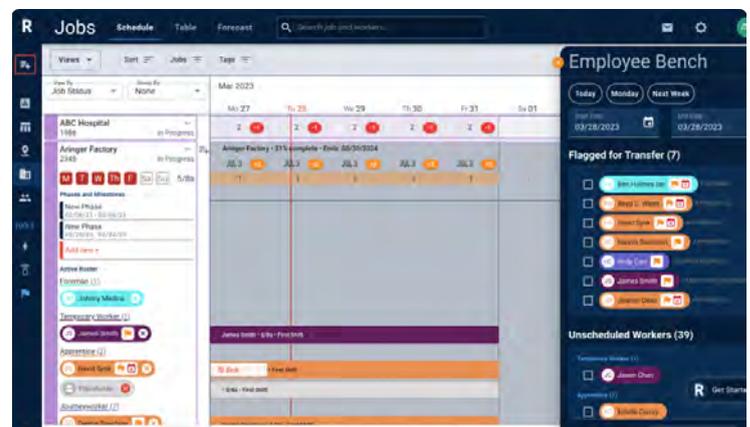
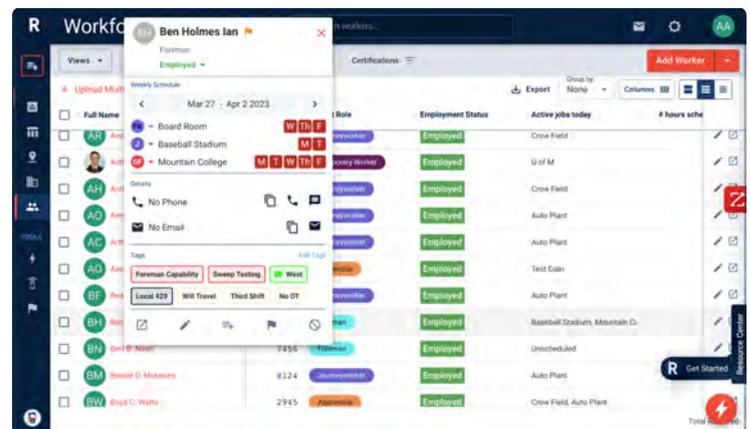
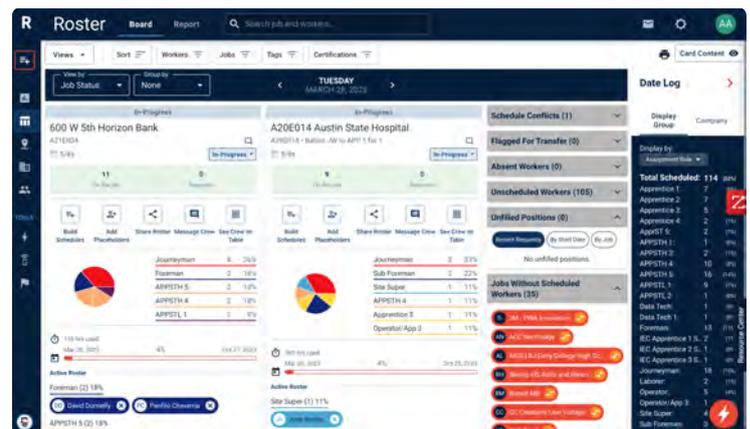
Today: You have a roundtable with your team that's hectic with potential miscommunication. It's challenging to decide who to move where or if there is enough labor to be allocated to your job to stay on schedule.

### WITH RIVET:

1. View all active jobs and workers on a **Digital Roster Board** in a daily or weekly view, with quick access to job and labor stats. Or use the **Schedule gantt**s if you prefer a timeline view that looks further into the future.
2. **Click on Worker Chips or Job Names**, on any page in RIVET, for key information.
3. When discussing changing labor needs, create **placeholders positions (labor requests)** on the Roster or Schedule views, and add **workers flagged for transfer**. View **unfilled positions** in a list on the Roster Board.
4. See who's available quickly in many ways: the **Unscheduled Workers bucket**, the **Absent Workers bucket**, or the **Employee Bench** in RIVET's main menu.
5. **Sort/Filter workers and tags** to assign the right people at the right time to jobs.
6. Use **pre-populated, customizable dispatch templates** and **saved message groups** to notify your team of changes.

### BENEFITS:

- A clear, collaborative and accessible labor plan that works for your business and your team.



# Worksheet: Mapping Labor Scheduling

Worksheet continued.

## Filling positions or transferring labor to other jobs

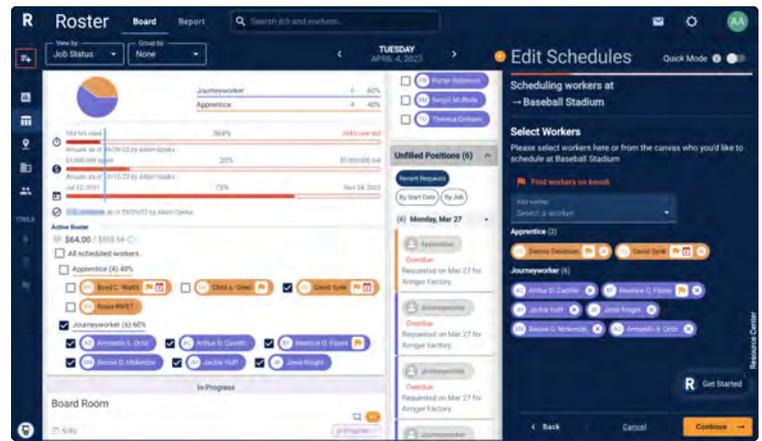
Today: You're juggling phone calls, multiple spreadsheets, working late in the office, and being on call over the weekend.

### WITH RIVET:

- Use RIVET's Schedule Drawer for individual or bulk assignments.
- Reference the Employee Bench, Flags for Transfer, Labor Requests, Schedule Conflicts and Worker Profiles all in one place to move the right people.

### BENEFITS:

- Manage labor faster and more effectively.
- Short-term or weekend scheduling made easy.
- Schedule for shut downs or jobs outside of the workers normal assignments.



[Learn more](#)

## Plan assignments by location

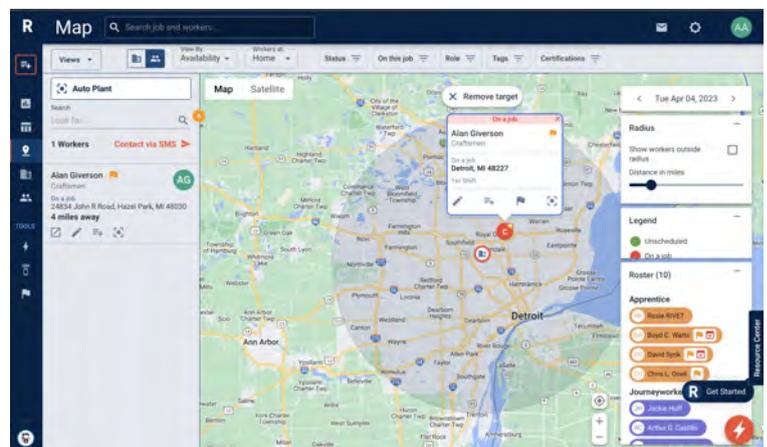
Today: You may be keeping a database of worker cities stored in a non filterable format and you might be color coordinating areas that are not transferrable or easily trackable.

### WITH RIVET:

- Using RIVET's Map feature to find which workers are close to which jobs.
- Store worker location data from their home and current job site.
- Sort workers by availability or skills right in the map view.

### BENEFITS:

- Decrease commute times.
- Increase efficiency.
- Stay on time and under budget by scheduling the correct workers at jobs close to them.



[Learn more](#)

# Worksheet: Mapping Field Communication

Field Communication tasks are typically performed by **Schedulers or Field Ops Leaders**. Field Communication is the distribution of time-sensitive or job-specific information from the back office to the field teams. The more streamlined the communication is, with good record keeping and acknowledgement, the more efficient a field team performs.

## Company-wide messaging

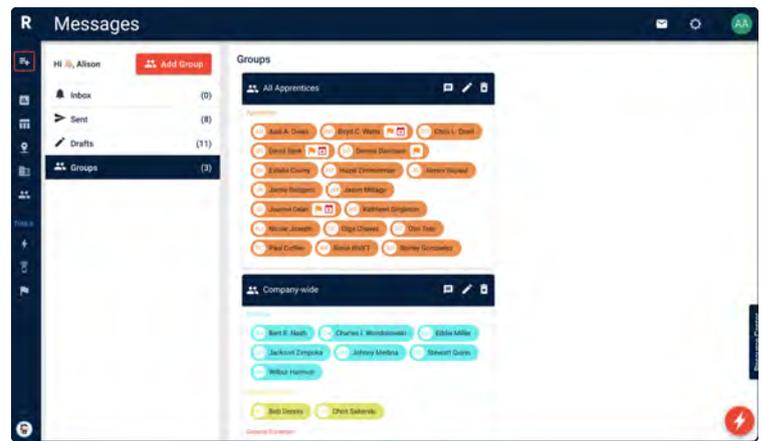
Today: You may be sending texts, making calls or sending emails to one or many people constantly. Miscommunication is rampant and factored into budgeting a job.

### WITH RIVET:

- Text, email or both using customizable dispatch templates with stored records.
- Create and save message groups.
- Monitor assignment acknowledgements and replies.

### BENEFITS:

- Faster, better communication.
- More connectivity with less guess work.
- Less missed assignments.



## Job-specific messaging

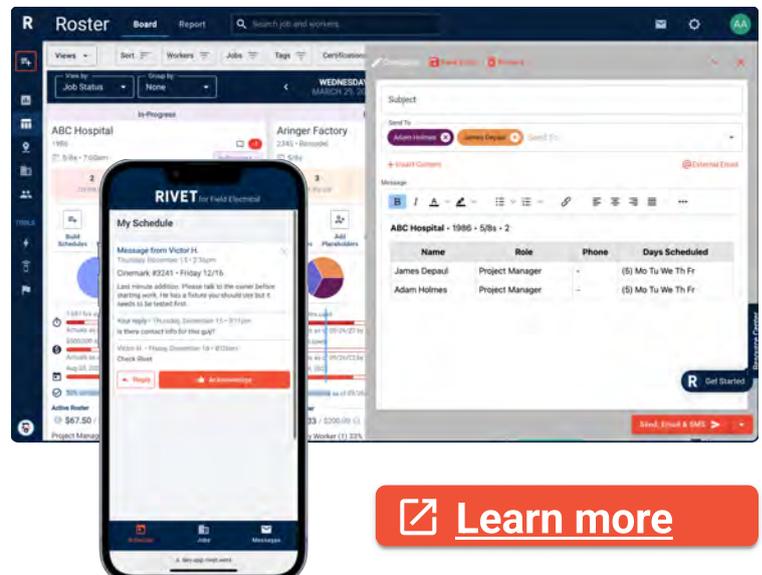
Today: You may be using a mix of calls, texts and emails with foreman to keep up with changes on the fly.

### WITH RIVET:

- Text, email or both using customizable dispatch templates.
- Message an entire job roster with the click of a button.
- Send dispatch reminders and monitor acknowledgements and replies.

### BENEFITS:

- Send custom messages on specific job changes.
- Populate messages with job data so there is no guesswork or having to compose messaging.
- Saving time and the possibility for miscommunication.



[Learn more](#)

# Worksheet: Mapping Field Communication

Worksheet continued.

## Schedule changes

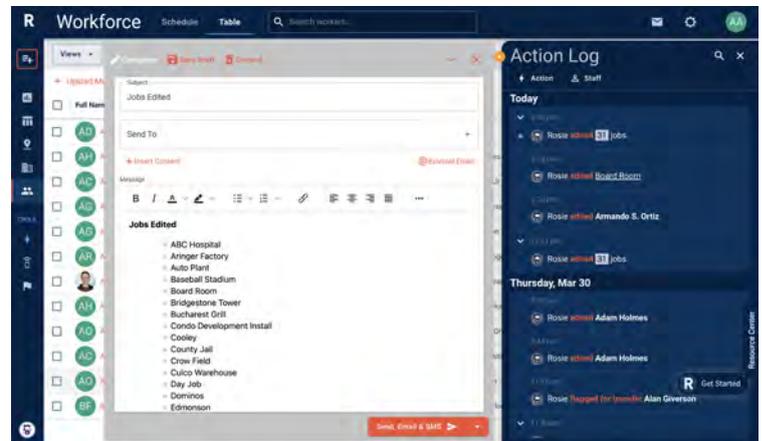
Today: You may be writing and sending a new message every time a schedule or assignment is changed.

### WITH RIVET:

- Use automated, pre-populated templates after schedules change are made.
- Dispatch templates can easily be modified with more information, or by adding more recipients.
- Quickly insert job content into messages with a drop-down menu.

### BENEFITS:

- Faster workflows.
- Stay ahead of the curve for scheduling updates.
- Less missed assignments.



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## Send important updates

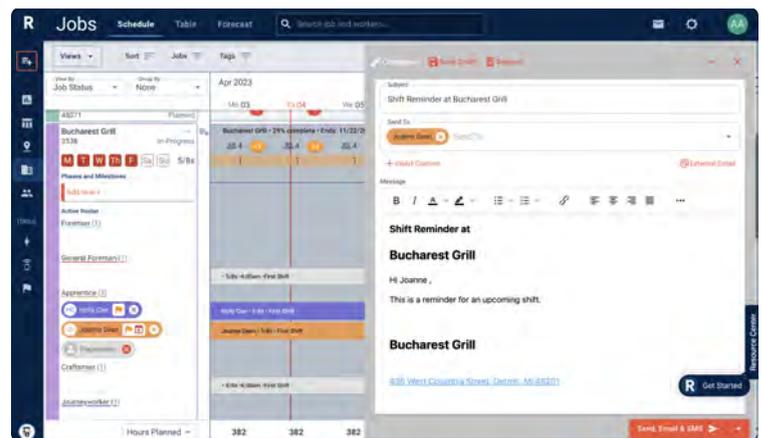
Today: You may be having to remember who needs what data and when, then populating messages manually. This takes too much time and is prone to mistypes and errors.

### WITH RIVET:

- Auto populate messages with custom Job and worker Data.
- Reference the Action Log and Labor Updates Log to review all back office changes in a news feed.

### BENEFITS:

- Streamlined messaging.
- Less mis-types or errors in messaging. Faster turn times.
- Better record-keeping.



[Learn more](#)

# Onboarding and Training with the RIVET Customer Success Team

We work directly with you throughout the entire implementation of your RIVET account, and after that too. **Our goal is to be helpful, useful and available.** We can guide you personally through your entire onboarding, or we can give you the tools to do it yourself. Learn more at <https://www.rivet.work/support/>.

## Guided Onboarding Plan

**Kickoff Call** with RIVET Customer Success Team

**Training 1** Configure Roles & Permissions/Import your data

**Training 2** Guided Application Walkthrough

**Training 3** Review Moves in RIVET/ Answer questions/ Best practices

## Resources

**Live Chat**  
In-app with RIVET team

**Resource Library**  
In-app video tutorials

**Help Center**  
Articles for every feature

**Customer Success**  
assigned white glove support

# How to set up your RIVET account for Admin users

Here's how to launch RIVET quickly and efficiently. Choose an Admin user on your team. A good fit for this role is your Operations team leader, who needs to see all things related to end-to-end labor planning. They also require the ability to add or edit roles with any permission level.

### **Step 1: Build a roles and permissions landscape for your team**

Getting your RIVET account configured starts with your roles and permissions. The roles in RIVET map to the job titles at your company, and permissions are what each role can do and see in their RIVET account. Think of your roles and permissions like an upside-down triangle: your leadership and back office can do more in RIVET, while your field teams have limited views that are specific to their jobs.

**Tip:** You can start by using RIVET's Default Roles that come with common permissions that work for most contractors. On the next page, there is a worksheet to help you think through it.

# Worksheet: Roles and Permissions Landscape

Here is a look at the most common roles and permissions used in RIVET by construction contractors. If needed, these can be customized further by working with the RIVET team.

Company Job Titles	RIVET Default Roles & Permissions	Manage Org Settings	Labor Forecast	Schedule & Roster	Workforce & Jobs Tables	Job Pages	Dispatch & Messages
Executive or Field Ops Director	Admin	✓	✓	✓	✓	✓	✓
Scheduler Superintendent Safety Manager	Scheduler	✗	✓	✓ Assign schedules to workers and jobs	✓ Create and edit jobs and workers	✓	✓
Project Manager	Project Leader	✗	✓ Limited to their jobs	✓ Limited to their jobs	✓ Limited to their jobs	✓ Limited to their jobs	✓ Limited to their jobs
General Foreman + Foreman	Field Leader	✗	✗	✓ Limited to their jobs	✓ Limited to their jobs	✓ Limited to their jobs	✓ Limited to their jobs rosters and to back office staff
Journey Worker + Craftsman + Apprentice + Pre-Apprentice	Worker	✗	✗	✗	✗	✓ Limited to their jobs	✓ Limited to receiving messages with acknowledge / reply

## Step 2: Import your Data

Before importing your workforce, jobs or equipment data, decide if you'll be doing the import yourself, or if you want support from the RIVET team. You'll also need to request any system integrations you might need.

1. Learn more about bulk data import here: <https://support.rivet.work/knowledge/https/www.rivet.work/help-center/how-do-i-add-my-workforce>
  - Or, request that the RIVET team import your data by emailing [support@rivet.work](mailto:support@rivet.work)
2. Learn more about integrations here: <https://support.rivet.work/knowledge/integrations>
  - Request your system integration with RIVET by emailing [support@rivet.work](mailto:support@rivet.work)

## Step 3: Explore the Application

You have several options for exploring the RIVET application. RIVET's recommended onboarding plan includes live trainings that give you an expert walk-through of the app. For a self-guided approach, you can access the in-app Resource Library and watch video trainings and articles if you get stuck.

### Option 1

**RIVET's Onboarding (recommended)**  
Schedule trainings with RIVET's Customer Success Team

### Option 2

**In-App Resource Library**  
Jump right in to the feature set and get help when needed in the Resource Library

## **Step 4: Add your team to RIVET in phases**

Doing a well-planned, phased rollout of RIVET to your team will help you be the most effective in managing change.

Recommended:

1. Your Admin user should have a strong grasp of the application before adding other users.
2. Add your team members that manage Workforce Data and provide them with your workflow mapping worksheet.
3. Add your team members that manage Labor Forecasting and Scheduling and provide them with your workflow mapping worksheets.
4. Add your field leaders, like foreman, for specific projects, to test and tweak the processes before rolling out to your entire field team.

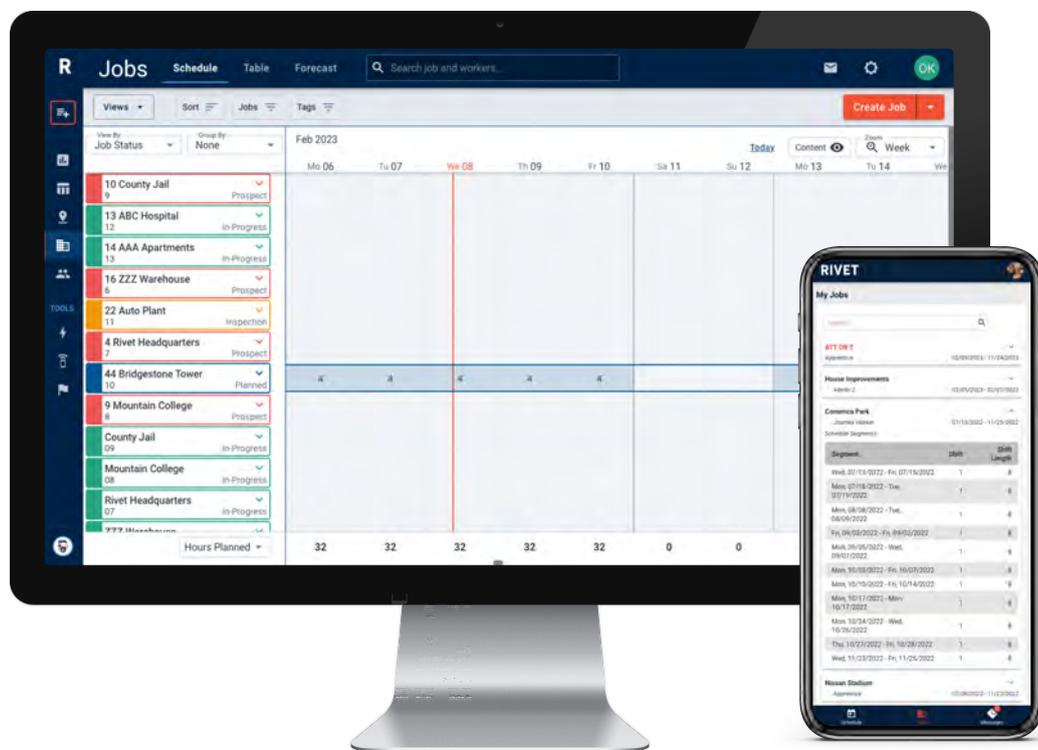
### **Considerations on adding your full field workforce:**

- You have the option to invite your field into the RIVET app as users, or you can push messages to your field teams without making them become app users. Either way, you can still use RIVET to streamline communications to your field teams by sending updates as text messages or emails pushed from your RIVET account to their mobile devices.
- Work with a RIVET Customer Success team member to configure the best option for you.

## When you're ready, there are a couple of options for adding new users:

- Add the rest of your back office team as Staff Users in the Manage Organization settings.
- Add single or bulk users from your field team: <https://support.rivet.work/knowledge/bulk-invite-workers>.

**As a reminder, access is limited based on role for all RIVET users, so review the roles you gave each user before sending an invite.**

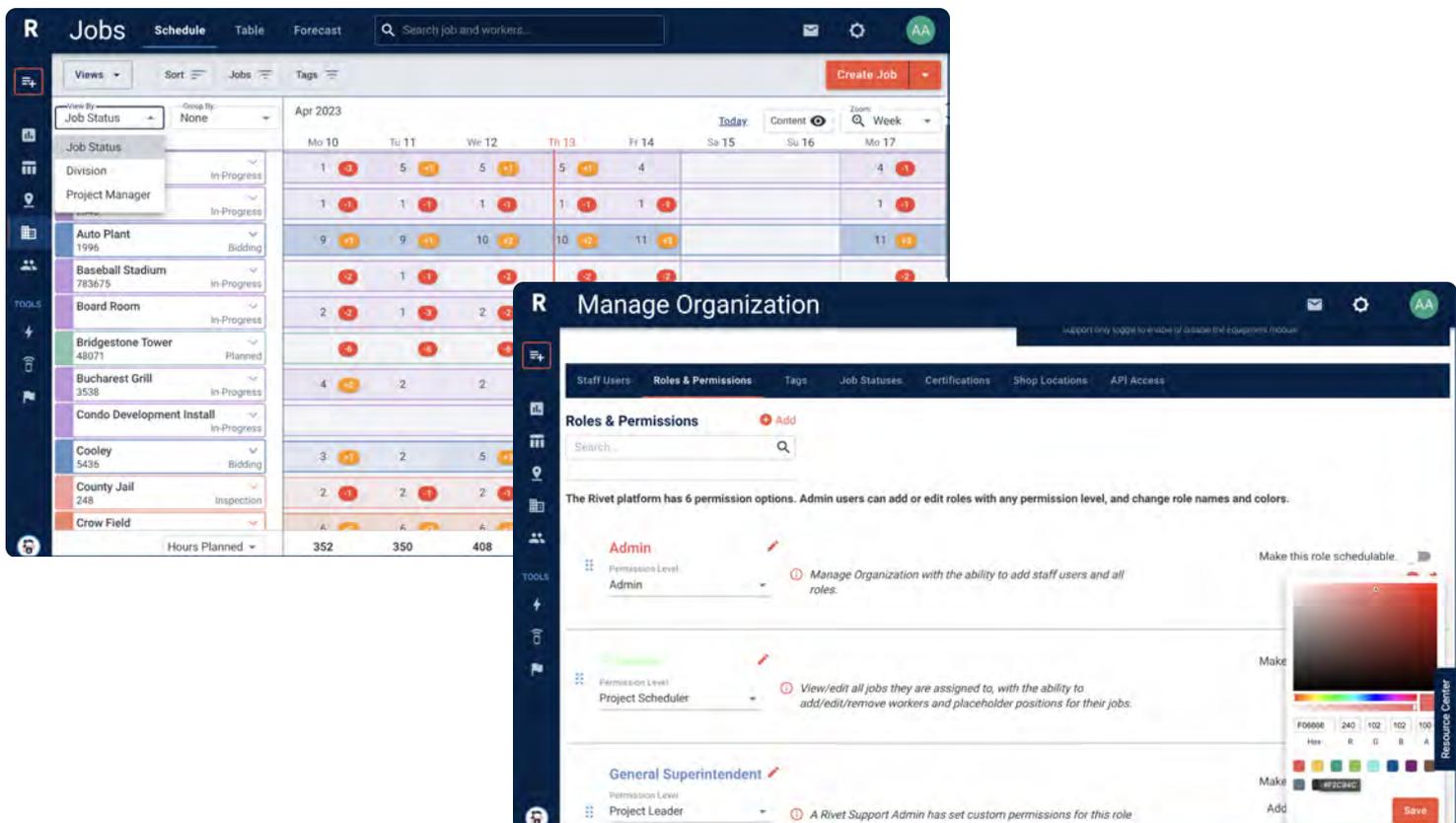


## LEVEL UP

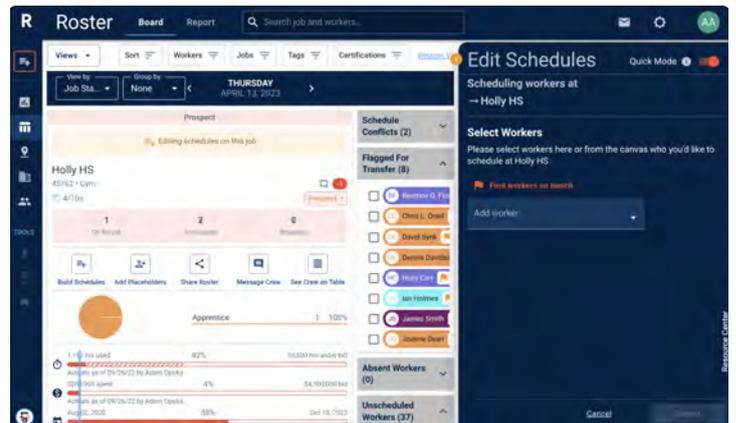
# Top tips for getting the most out of RIVET

1. **Customize the color scheme of RIVET** to fit your organizations preferred workflows. Use Display Groups to increase visibility of the data you need to see quickly. In Manage Organization:

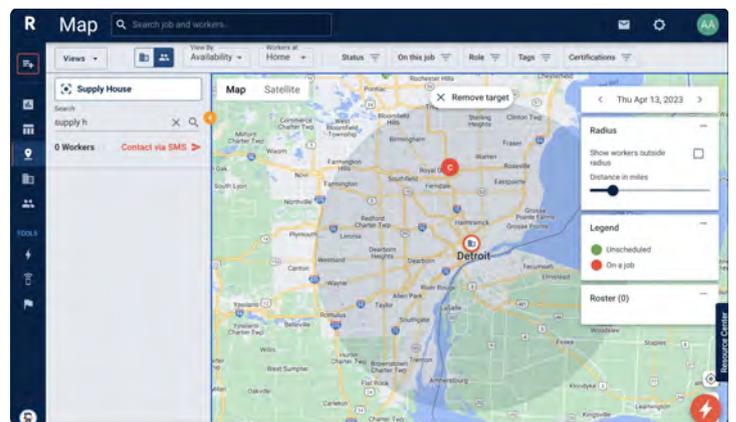
- Editing the colors of your **Roles** will change the color of your workers throughout the app.
- Editing the colors of your **Job Statuses** will change the color of your job schedules and cards throughout the app.
- Edit the colors of your tag categories or individual tags and enable **Display Groups** so you can filter and sort by tag categories throughout the app.



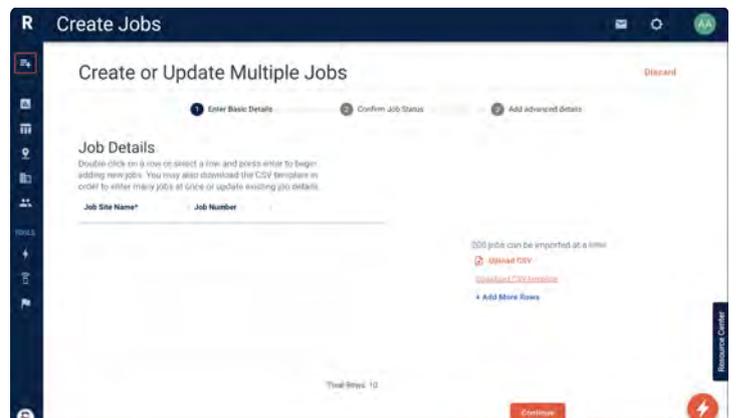
2. Need to schedule labor quickly?  
Utilize **RIVET Quick Mode** to assign and schedule workers to a Job-Site in the least amount of time.



3. Add **Supply Houses** as jobs into RIVET and track where to get supplies closest to a job. Save on time and gas.



4. Update a number of jobs simultaneously using RIVET's **Bulk Job Editor**.



# RIVET

— Proudly in Detroit, MI —



**Contact us:**

(313) 312-8429 // [support@rivet.work](mailto:support@rivet.work)