



User Manual

Quick and complete guide to the ObraDocs application

This manual explains the application's main menus, fields, buttons and procedures.

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Recommended sequence

1. Sign in with your email and password, or create the company on first access.
2. Create the Projects and register Workers and entities.
3. Review the Document titles and upload the required files.
4. Create the remaining Users and configure the GDPR Centre.
5. Regularly review the Dashboard and Subscription status.

1. Login

Accessing the application, choosing the language and recovering the password.

Use the login screen whenever you want to access ObraDocs with an existing account.

Screen fields and elements

Field / option	Purpose
Language (PT, EN, ES, FR, DE)	Selects the application language. The choice is saved for the session and can later be changed at the top of the application.
Email	Email address used when the account was created or assigned by the company administrator.
Password	The user's personal password. It must not be shared with anyone else.

Main buttons and actions

- Sign in — validates the email and password and opens the Dashboard.
- Create company — opens the form to register a new company and its first administrator.
- Recover password — sends instructions to the registered email address to set a new password.

Good practices

- After several incorrect attempts, access may be temporarily restricted for security reasons.
- Always check the language before signing in, especially on shared devices.

2. Create company

Initial company registration and creation of the administrator user.

This form is used only for the first registration. When the account is created, ObraDocs creates the company and its administrator.

Screen fields and elements

Field / option	Purpose
Company	Trading name or legal name of the company that will use ObraDocs.
Tax ID	Tax identification number or VAT number. Letters and numbers are accepted, up to 20 characters.
Address	Street, number, floor, unit or any other information needed to identify the company's registered office or address.
Postcode	Portuguese postal code in the 0000-000 format. It is used to look up the town automatically.
Town/City	This field is filled in automatically after the postal code is validated.
Administrator	Name of the person who will receive the company's first administrator access.
Email	Administrator email and the company's initial contact/billing email. It must be valid and must not already be linked to another account.
Password	At least 8 characters, including at least one uppercase letter, one number and one special character.
Confirmation of legal documents	Required checkbox confirming that the Privacy Policy, Terms of Use and Data Processing Agreement have been read.

Main buttons and actions

- Create account — validates the data, creates the company and starts the applicable period/plan.
- Back to login — returns to the sign-in screen without creating the company.

Good practices

- Enter a real postal code so that the town can be confirmed automatically.
- Keep the administrator's email and password in a secure place.

3. Projects

Creation, editing, searching and status management of the company's projects.

Projects organise documents by project. The maximum number of projects depends on the subscribed plan.

Screen fields and elements

Field / option	Purpose
Code	Short reference used to identify the project. This field is required.
Name	Name of the project or job. This field is required.
Client	Name of the project owner, client or contracting entity.
Location	Place where the project is carried out, for example a town, address or worksite.
Manager	Person responsible for monitoring the project.
Home	Planned or actual project start date.
End	Planned or actual project completion date.
Status	Project status: Planned, Active, Suspended, Completed or Archived.
Search projects	Search by code, project name, client or status.

Main buttons and actions

- Save — creates the project.
- Edit — loads the project data into the form so it can be changed.
- Delete — removes the project. Linked documents are not deleted, but they are no longer associated with the project.
- Code, Project, Client and Status headings — sort the table in ascending or descending order.

Good practices

- Use simple, consistent codes, for example 2026-001.
- Change the status to Completed or Archived when the project ends, without deleting its document history.

4. Workers and entities

Registration of workers, subcontractors, suppliers and associated companies.

This menu stores the people and entities to which documents can be linked.

Screen fields and elements

Field / option	Purpose
Type	Classifies the record as Worker, Subcontractor or Supplier.
Name	Full name of the person or legal name of the entity. This field is required.
Tax ID	Tax identification number of the person or entity.
Email	Personal or primary email address for the record.
Phone	Contact telephone number.
Company	Company to which the worker or entity is linked. It can remain as No company.
... button next to Company	Opens the associated company management area. It allows companies with no linked records to be added, edited, filtered and deleted.
Status	Sets the record as Active or Inactive.
Send email to — Personal	Includes the worker's/entity's own email address in document notifications.
Send email to — Company	Includes the associated company's email address in document notifications.
Privacy notice delivered	Records that the privacy information has already been delivered to the data subject.
Method	Indicates how the notice was delivered: Email, Paper/PDF, Portal or Other.
Open notice	Opens the privacy notice template for viewing, printing or delivery.
Filter table	Searches by type, name, tax ID, company, status, email or telephone.

Main buttons and actions

- **Save** — creates or updates the record.
- **Open card** — opens the entity's public verification page, when available.
- **Edit** — changes the existing data.
- **Delete** — if there are no documents, deletes the record; if documents exist, it deactivates the record and restricts processing to preserve the history and allow review in the GDPR Centre.

Good practices

- Before sending alerts, confirm whether the personal email, company email or both should receive notifications.
- Record delivery of the privacy notice and the method used to keep evidence that the information was provided.

5. Documents

Uploading, expiry, retention, searching and file management.

The Documents menu is the operational centre of ObraDocs. Each file can be linked to a project and to a worker or entity.

Screen fields and elements

Field / option	Purpose
Title	Document type, for example Licence, Insurance policy or Medical certificate. The ... button opens title management.
Project	Project to which the document belongs. It can remain without a project when not applicable.
Entity	Worker, subcontractor or supplier linked to the document. It can remain empty when not applicable.
Expiry date	Date on which the document ceases to be valid. It may be required depending on the title settings.
Retain until	Internal date until which the document is intended to be retained. It is different from the expiry date and must comply with applicable legal obligations.
Legal hold	Prevents deletion while the document must be retained because of a legal obligation, audit, complaint or court proceedings.
Choose document	Selects the main file. PDF, JPG and PNG files up to 15 MB are allowed. On a smartphone, the document can be photographed.
Back page (optional)	Allows a photograph of the reverse side to be selected. The application creates one PDF containing front and back.
Add more / Finish on smartphone	Allows several photographed pages to be combined before the upload is completed.
Notes	Additional information about the document, its situation, source or internal notes.
Search documents	Searches by title, project, entity, expiry date, retention date or status.

Main buttons and actions

- Upload — saves the file and its related data.
- Open — displays or downloads the saved document.
- Edit — changes the document data; the physical file is not replaced during editing.
- Delete — permanently deletes the record and attempts to remove the file from the server.
- Table headings — sort by Title, Project, Entity, Expiry date, Retain until and Status.

Good practices

- The status is calculated automatically: Valid, Expiring soon, Expired or No expiry date.
- The Expiring soon period depends on the alert days defined for the corresponding title.
- Expiry date shows when the document expires; Retain until shows how long it should remain stored.

6. Document titles

Configuration of document types and expiry alerts.

Titles determine the options available in the Title field when uploading documents. The company receives initial titles that can be customised.

Screen fields and elements

Field / option	Purpose
Title	Name of the document type, for example Workplace accident insurance.
Alert	Number of days in advance at which the document changes to Expiring soon.
Expiry date required	When selected, the document can only be uploaded with an expiry date.
Available in the document selection list	When selected, the title appears in the Documents form list. Clearing it hides the title without deleting existing documents.
Search table	Searches by title, mandatory expiry date, alert, status or number of documents.
Documents	Shows how many documents use each title.

Main buttons and actions

- Add title — creates a new document type.
- Edit — changes the name, alert, mandatory expiry setting or availability.
- Delete — removes the title from the settings. Existing documents keep the saved title.
- Table headings — sort the records.

Good practices

- Set alerts far enough in advance to renew the document before it expires.
- Prefer deactivating a title used in the past rather than deleting it, so the settings remain easier to understand.

7. Users

Creation and administration of company access accounts.

This menu is restricted to administrators. The permitted number of active users depends on the plan.

Screen fields and elements

Field / option	Purpose
Name	Name of the user who will have access to ObraDocs.
Email	Identifier used to sign in. Each email address can only be linked to one account.
Role	Access profile: Administrator, Manager, User or Read-only.
Password	It is required when creating the user and must meet the security requirements. When editing, leave it blank to keep the current password.
Active user	Allows or prevents access to the application.
Search users	Searches by name, email, profile or status.

Main buttons and actions

- Create user — adds a new access account.
- Edit — changes the name, email, profile, status or password.
- Deactivate / Activate — blocks or restores access without deleting the record.
- Name, Email, Profile and Status headings — sort the table.

Good practices

- The company must keep at least one active administrator.
- An administrator cannot deactivate their own access.
- Create a separate user for each person; do not share one account among several employees.

8. GDPR Centre

Privacy settings, data-subject requests, incidents, retention and exports.

The GDPR Centre brings together technical tools that support data protection. It does not replace legal analysis or the company's internal procedures.

Settings

Field / option	Purpose
Privacy contact	Name of the person or department responsible for receiving privacy matters.
Privacy email	Contact email for requests and communications concerning personal data.
Controller address	Address of the company or data controller.
DPO, where applicable	Name of the Data Protection Officer, where one exists or is required.
DPO email	Email address of the Data Protection Officer.
Default document retention	Number of months used by default to calculate the Retain until date.
Audit retention	Number of months defined for activity and audit records.

Data subject requests

Field / option	Purpose
Requester name	Person submitting the request.
Email	Requester's contact details.
Request type	Access, Rectification, Erasure, Restriction, Portability, Objection or Other.
Received on	Date and time received, used to calculate the initial deadline.
Data subject/entity	Links the request to a registered worker, supplier or subcontractor.
User	Links the request to an application user, where applicable.
Description	Summary of the request and the information needed to follow it up.
Status and Notes/decision	Used to track the assessment, completion or reasoned refusal.

Data breach register

Field / option	Purpose
Title	Short name describing the incident.
Detected on	Date and time when the company became aware of it.
Occurred on	Estimated date and time of occurrence, if known.
Risk level	Under assessment, Low, Medium or High.
Estimated number of data	Approximate number of people affected.

subjects	
Data categories	Types of information involved, for example identification, contact details or documents.
Description	What happened and how it was detected.
Measures taken	Containment, correction and prevention measures.

Account deletion request

Field / option	Purpose
Note	Additional information for the operator to assess the request.
Confirmation	Requires PEDIR ELIMINAÇÃO to be entered. The request does not delete the data immediately.

Main buttons and actions

- Exports — exports company data, the activity log and the audit log, and opens the privacy documents.
- Data subjects — exports data, restricts processing or carries out an approved, irreversible erasure.
- Incidents — manages the status, risk, measures and record of notifications to the supervisory authority and data subjects.
- Retention — identifies documents past their retention date and without a legal hold, for review before possible deletion.
- Notice for data subjects — opens the information document intended for data subjects.

Good practices

- Before deleting data, check legal obligations, contracts, disputes, billing and evidence requirements.
- Automatic deletion is disabled by default; documents must be reviewed by a responsible person.
- Recording an incident does not automatically determine whether the supervisory authority or data subjects must be notified.

9. My subscription

Viewing the plan, billing, renewal and payment management.

This menu shows the account's commercial status and the information received from Stripe.

Screen fields and elements

Field / option	Purpose
Current plan	Name of the active plan, for example Start, Pro or Business.
Status	Indicates whether the subscription is active, in a trial period, cancelled or in another status reported by Stripe.
Monthly/annual amount	Price for the selected plan and billing cycle. The annual cycle may show the associated discount.
Billing cycle	Indicates whether billing is Monthly or Annual.
Next renewal/end of period	Expected renewal date or the date until which access remains active.
Company details	Shows the company name, tax ID, billing email and Stripe customer identifier.
Invoices and payments	Lists the date, number, status, total and invoice link, when supplied by Stripe.

Main buttons and actions

- Change plan — opens the plan and billing-cycle selection page.
- Manage payment and cancel — opens Stripe's secure portal to update the payment method, review charges or cancel.
- View invoice — opens the invoice hosted by Stripe, when available.

Good practices

- When a subscription is cancelled at the end of the period, access continues until the displayed date.
- Payment information is managed in the Stripe portal; ObraDocs does not display the full card details.

10. Dashboard

Quick overview of projects, documents, expired documents and documents expiring soon.

The Dashboard provides an operational summary. Cards can be opened to view the records included in each total.

Screen fields and elements

Field / option	Purpose
Subscription validity	Shows the plan, expiry date and remaining days. The notice becomes more prominent as the end approaches.
Select project	Filters totals and document lists by a specific project or by All projects.
Documents expiring in the next days	Sets the advance period used to show documents that are close to expiry.
Projects	Number of projects included in the current filter.
Documents	Total number of documents included.
Expired	Documents whose expiry date has already passed.
Expiring soon	Documents that expire within the defined advance period.
Smartphone instructions	Explains how to add ObrDocs to the Home Screen on an iPhone/iPad or in Chrome.

Main buttons and actions

- New project — opens the Projects form directly.
- Upload document — opens the Documents form.
- Send emails — sends alerts by entity for expired or expiring documents, using the selected project and number of days.

Good practices

- Click a card to open or close its corresponding list.
- Before sending emails, confirm the selected project and the number of days in advance.