



Quick help - iProdGest Production

Topic-based guide to configure the company, prepare the team, open projects, add activities and record production in the correct order.

Help language: English

The full manual opens in the language selected by the user.

- 1. Recommended sequence**
- 2. Login and company creation**
- 3. Roles, staff and users**
- 4. Company, branches and annual budget**
- 5. Project opening and activities**
- 6. Production record**
- 7. Brief dashboard description**
- 8. Checklist and common issues**

1. Recommended sequence

Follow this sequence so that lists, access profiles and automatic fields are available.

- 1. Login / Create company
- 2. Roles and staff
- 3. Users
- 4. Company and budget
- 5. Open project
- 6. Add activities
- 7. Record production
- 8. View dashboards

Required order for new people

Company creation automatically generates the first user and an Administrator staff record. For all other people, always follow: Role -> Staff member -> User.

When a list is empty

The corresponding master table normally has not yet been completed. Use the "..." button next to the field to create the missing option.

2. Login and company creation

2.1 Login

Start screen -> System Access

The login screen lets you enter an existing account, recover a password or start registering a new company.

PT EN ES FR

Acesso ao Sistema

Email ou Utilizador

Palavra-passe

Entrar

Esqueceu-se da senha?

[Criar nova empresa](#)

System login form.

Field / option	How to use	Notes
PT / EN / ES / FR	Choose the language of the login screen.	After login, the application uses the language defined for the user.
Email or Username	Enter the account email address or username.	The value must match an active user.
Password	Enter your personal password.	Do not share credentials between several people.
Sign in	Validates the details and opens the application.	The dashboard depends on the role linked to the staff member.
Forgot your password?	Starts the password recovery process.	First enter the email address in the access field.
Create new company	Opens the company registration form.	Use it only for a company that does not yet have an account.

2.2 Create the company

Login -> Create new company

Registration creates the company account and the first administrator, and starts the free trial. You do not need to choose a plan or enter card details at this stage.

Company and administrator user creation form.

Field	How to complete	Notes
Company name *	Legal name or trading name that identifies the account.	This is the main company in the database.
Tax ID	Company tax identification number.	Recommended for identification and documents.
Language	Initial language of the administrator.	Portuguese, English, Spanish or French.
Address *	Street, avenue, plot or other head-office address.	It can be completed later in the company record.
Postal code *	Enter it in the 0000-000 format.	The application attempts to fill in the town automatically.

Field	How to complete	Notes
Town / City *	Confirm the town that was found.	It can be corrected manually.
Administrator username *	Short name used to sign in.	Use letters, numbers, a dot, hyphen or underscore.
Email *	Unique email address of the administrator.	Used for access and password recovery.
Password *	Set a secure password.	Avoid passwords used on other services.
Confirm password *	Repeat the password exactly.	Both fields must match.

After saving

The application creates the company, administrator user and initial staff record, starts the 15-day free trial and allows immediate access. The plan is selected later in the Subscription menu.

3. Roles, staff and users

This configuration determines who appears in projects and activities, and which dashboard each person opens.

Required link

The Username field in the staff record must be exactly the same as the User field created in User Management. This link identifies the role and opens the correct dashboard.

3.1 Create or review roles

Data -> Staff -> Role

Before creating a staff member, make sure the role exists. For profiles with their own dashboard, use one of the recognised names.

Name to register	Normal use
Admin	Application administration profile.
Administrador	General management and main configuration.
DProducao	Production Director.
DObra	Project Manager / Site Director.
EncGeral	General Foreman.
EncObra	Site Foreman.
Administrativo	Operational administration profile.
DEquipamento	Equipment Manager / Director.
DCompras	Purchasing Manager / Director.

Category and Role are different

Category describes the professional classification. Role defines the person's responsibility and access profile in the application.

Do not invent variations for access profiles

A different role name may be valid for internal classification, but it may not open a specific dashboard.

3.2 Create the staff member

Data -> Staff -> Add staff member

The staff record represents the person in projects, activities and production records.

NOVO EMPREGADO

Nº

Nome

Categoria

--

▼

...

Função

--

▼

...

Empresa

--

▼

Estado

Ativo

▼

Email

Username

GRAVAR

VER TODOS

New Employee / Staff form.

Field	How to complete	Notes
No.	Internal staff number.	It must be unique within the company.
Name	Full name or professional name.	This is the name shown in project responsibility fields.
Category	Select the professional category.	Create the category first if the list is empty.
Role	Select the profile or role.	For dashboard access, use a recognised role.
Company	Select the main company.	In the SaaS version there is normally only one company.
Status	Active or Inactive.	Prefer deactivation instead of deleting people with history.
Email	Professional email address.	It may be the same as the user email.
Username	Linked username.	It must be exactly the same as the User created in the next step.
Save	Creates or updates the staff record.	Then create the corresponding login user.

3.3 Create the user

Data -> Staff -> User

Create a user only for people who need to sign in to the application.

NOVO UTILIZADOR

Utilizador

Email

Password

Língua

PT - Português

Ativo

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Procurar utilizador ou email...

LISTA DE UTILIZADORES

ID	UTILIZADOR	EMAIL	LÍNGUA	ATIVO	AÇÕES
1	didi	rcammarques@me.com	PT	Ativo	
3	dobra	nd@nd.pt	PT	Ativo	
2	rodmar	rodmar@ip.pt	PT	Ativo	

User creation, search and management.

Field	How to complete	Notes
User	Name used at login.	It must be the same as the Username in the staff record.

Field	How to complete	Notes
Email	Unique user email address.	It can also be used to sign in and recover the password.
Password	Initial password.	When editing, leaving it blank keeps the current password.
Language	Preferred language for this user.	PT, EN, ES or FR.
Active	Allows or blocks access.	Clear it to suspend login without deleting history.
Search	Filters the list by user or email.	Useful when there are many users.
Actions	Edit or delete.	Avoid deleting users linked to history; deactivate them instead.

Recommended test

Sign out and confirm that the new user can access the application. If an unrecognised role is shown, review the Role and make sure Staff > Username and User > User are identical.

4. Company, branches and annual budget

4.1 Company structural cost

Data -> Company -> Company structural cost

The structural cost percentage is defined at company level and used in project financial calculations.


EDITAR EMPRESA

Empresa

NIF

Custo de Estrutura

%

Introduza a percentagem aplicada aos custos de estrutura.


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Definition of the structural cost percentage.

Field	How to complete	Notes
Company	Company name for the account.	Read-only in this menu.
Tax ID	Company tax ID.	Read-only in this menu.
Structural Cost	Percentage applied to the selling value of activities.	Example: 8.00 means 8%.

Field	How to complete	Notes
Save	Updates the company percentage.	Projects display this percentage automatically.

Structural cost = Total project sales x Structural cost percentage

What it represents

General company overhead allocated to projects, such as management, premises, central services, systems, insurance and administrative support.

4.2 Branches / Delegations

Data -> Company -> Branch

Create branches when the company needs to separate projects, budgets and results by region, office or business unit.

GESTÃO DE DELEGAÇÕES

Nome da Delegação

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Pesquisar delegação...

ID	NOME DA DELEGAÇÃO	AÇÕES
2	Norte	
1	Sul	

Create, search, edit and delete branches.

Field	How to complete	Notes
Branch name	Name of the region, office or unit.	Examples: North, South, Lisbon, Angola.
Save	Creates or updates the branch.	It becomes available in projects and the annual budget.
Search branch	Filters the existing list.	Enter part of the name.
Actions	Edit or delete.	Do not delete branches already used in projects or budgets.

Branches are optional

A company without branches can work as a single structure. For analysis by region or office, create branches before the annual budget and before projects.

4.3 Annual budget

Data -> Company -> Annual Budget

The annual budget feeds the production-versus-budget dashboards and summaries by branch and project type.

Carregar Orçamento Anual

ANO

2026

DELEGAÇÃO

...

TIPO DE OBRA

...

VALOR

Grav

Orçamentos Anuais Registrados

ANO	DELEGAÇÃO	TIPO DE OBRA	VALOR	AÇÕES
2026	Norte	Contenções	150.000,00€	 
2026	Norte	Fundações	150.000,00€	 
2026	Sul	Contenções	150.000,00€	 
2026	Sul	Fundações	125.000,00€	 

Resumo do Orçamento 2026

Ano:

2026

TOTAL POR DELEGAÇÃO

Norte:

300.000,00€

Sul:

275.000,00€

Total Geral:

575.000,00€

Os valores são carregados por ano, delegação e tipo de obra.

Resumo por Atividade 2026

ATIVIDADE	VALOR
Contenções	300.000,00€
Fundações	275.000,00€
Total Geral	575.000,00€

Annual budget entry and summary.

Field / area	How to complete	Notes
Year	Calendar year of the target.	Select the year to view or edit.
Branch	Unit responsible for the target.	Create the branch beforehand.
Project Type	Project type to which the target applies.	It must exist in the Project Types table.
Value	Annual target value for the selected combination.	Use the value approved in the commercial/production budget.
Budget Summary	Totals by branch.	Confirms the overall total for the year.
Summary by Activity	Totals by project type.	The screen may use the label Activity.
Actions	Edit or delete a row.	Avoid duplicating Year + Branch + Project Type.

Recommended check

After saving, confirm that the totals by branch, by project type and the overall total match the approved budget.

5. Project opening and activities

5.1 Open a project

Projects -> Project Management

The project record contains commercial details, internal responsibilities, client contacts and the parameters used in planning and production.

GESTÃO DE OBRAS

DADOS GERAIS

Cód.

...

Empresa

...

Delegação

...

TIPO DE OBRA

...

Nome da Obra

...

Cliente

...

Localização

...

Início

dd/mm/aaaa

Data Auto

dd/mm/aaaa

Estado

Ativa

Enc. Gerais

0.000,00

% Custo Estrutura

0.000,00

RESPONSÁVEIS INTERNOS

D. Obra

...

D. Produção

...

Admin

...

Administrativo

...

Compras

...

Resp. Equipa

...

CONTACTOS CLIENTE (DO E DP)

Nome DO

...

TeL DO

...

Email DO

...

Nome DP

...

TeL DP

...

Email DP

...

FERIADOS TRABALHADOS

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VER OBRAS

Project opening and editing form.

Field	How to complete	Notes
Code	Unique and stable project code.	Used in activities, production, reports and searches.
Company	Company responsible for the project.	In the SaaS account, the registered company normally appears.
Branch	Project branch.	Optional, but required for analysis by branch.
Project Type	Technical/commercial classification of the project.	Used in budgets and dashboards.
Project Name	Descriptive project name.	Use a short and easily recognisable name.
Client	Contracting entity.	Create the client first if it is not in the list.
Location	Place where the work is carried out.	Depends on the Locations master table.
Start	Planned or actual start date.	Used as a planning reference.
Measurement Date	Reference date/day for the measurement certificate.	Used in indicators and invoicing criteria.
Status	Active, stopped, completed or another available status.	Normally start with Active.
General Expenses	Fixed amount, in euros, for project-specific general expenses.	Examples: site facilities, security, general mobilisation and support resources not allocated to activities.
% Structural Cost	Percentage defined in the company record.	Filled automatically and should not be changed in the project.
Project Manager	Internal person responsible for the project.	The selection controls access for the project-manager profile.
Production Director	Internal person responsible for production.	Used in control, alerts and dashboards.
Admin	Administration/management person responsible.	Select an active staff member.
Administrative	Administrative support for the project.	Select when applicable.
Purchasing	Purchasing person responsible.	Identifies internal responsibility.
Team Leader	Main team leader or supervisor.	Select the appropriate staff member.
Name / Tel / Email PM	Client-side Project Manager contact.	External client details.
Name / Tel / Email PD	Client-side Production Director contact.	Complete when available.
Worked Holidays	Marks holidays that count as working days for this project.	Affects the calculation of activity working days.

General Expenses

Fixed, project-specific costs that are not directly distributed across activities.

Structural Expenses

The share of the company's general overhead allocated to the project. It is calculated by applying the company percentage to total project sales.

5.2 Add activities to the project

Projects -> Project Activities

Each activity defines what will be carried out, the planned quantity, productivity, duration, sales value, cost, margin and responsible people.

ATIVIDADES DA OBRA

Cód. Cabeçalho

Nome Cabeçalho

Cód. Auto

Texto para o Auto

Nome da Atividade

Unidade

Qtd. Prevista

Rend. Previsto

Dias Prev.

Ini. Previsto

Unit. (€)

Total (€)

Custo (€)

Margem

%

V. Materiais

Grau

D. Obra

Enc. Geral

Enc. Atividade

Manobrador

Observações

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CÓD. AUTO	NOME DA ATIVIDADE	UN	QTD	VALOR (€)	TOTAL (€)	CUSTO TOTAL (€)	MARGEM (€)	%	DIAS	INÍCIO	FIM	GRAU	AÇÕES
1.1	Mobilização	Mt	1,00	5.750,00	5.750,00	3.500,00	2.250,00	39,13%	1	10/08/2026	10/08/2026	Baixa	
2.2	Micro d 70	Mt	2.500,00	40,00	100.000,00	85.000,00	15.000,00	15,00%	46	11/08/2026	13/10/2026	Baixa	
INÍCIO: 10/08/2026 FIM: 13/10/2026 47 DIAS ÚTEIS TOTAIS 65 DIAS DE CALENDÁRIO					TOTAL GERAL:	185.750,00 €	88.500,00 €	17.250,00 €	16,31%				

Activity planning, costing and responsibility form.

Field	How to complete	Notes
Header Code	Code for a group heading in the measurement certificate.	Complete only when the activity starts a group.
Header Name	Description of the group heading.	Used in measurement documents.
Measurement Code	Activity code/position in the measurement certificate.	Use the code agreed with the client.
Measurement Text	Text to appear in the measurement certificate.	It may differ from the internal activity name.
Activity Name	Select the base activity.	The unit is filled from the Activities table.
Phase	Phase in which the activity is performed.	Allows the same activity to be repeated in different phases.
Unit	Measurement unit.	Automatic: m, m2, m3, unit, tonne, etc.
Planned Qty.	Total budgeted/contracted quantity.	This is the cumulative activity target.
Planned Productivity	Quantity planned per working day.	Used to calculate days and compare daily production.
Planned Days	Number of planned days.	Calculated by rounding up Planned Qty. / Planned Productivity.
Planned Start	Planned start date.	The end date is calculated in working days, including configured holidays.
Unit (€)	Selling price per unit.	Used to value production and planned sales.
Total (€)	Planned sales value of the activity.	Calculated: Planned Qty. x Unit Price.
Cost (€)	Total planned cost of the activity.	Enter the estimated overall execution cost.
Margin	Difference between planned sales and activity cost.	Calculated automatically.
%	Activity margin percentage.	Calculated: Margin / Total x 100.
Materials Value	Value of materials included in the activity.	Supporting information for cost analysis.
Difficulty	Activity difficulty level.	Shown as Classification in production records.
Project Manager	Project Manager responsible for the activity.	Transferred automatically to production.
General Foreman	General Foreman.	Transferred automatically to production.
Activity Foreman	Person directly responsible for the activity.	Transferred automatically to production.
Operator	Main equipment operator.	Transferred automatically to production.
Notes	Activity-specific notes.	Record constraints, exclusions or instructions.

Margin = Total sales - Planned cost | Margin % = Margin / Total sales x 100

Before saving

Confirm the quantity, productivity, unit price, cost, planned start and responsible people. These values feed planning,

production and dashboards.

6. Production record

6.1 Record daily production

Production -> Production Record

First select the date, activity/phase and equipment. Automatic fields are completed from the project and activity.

REGISTO DE PRODUÇÃO

dd/mm/aaaa

Atividade

Equipamento

...

H. Mag.

...

Unidade

Qtd. Prev.

P. Real

Val. Uni.

Rendim.

Qtd.

Total

Nº Colab.

Classificação

Status

chk

Dt. Fin

dd/mm/aaaa

Motivo

...

Horas

Justificação

GRAVAR PRODUÇÃO

TOTAL PREVISTO

185.750,00 €

TOTAL REALIZADO

10.990,00 €

P. REAL

94.760,00 €

% REALIZADA

10,4%

TRABALHO REALIZADO

DATA

ATIVIDADE

EQUIPAMENTO

DOBRA

ENCARREGADO G

ENC. ACTV

MANOBRADOR

H. MAG.

RENDIM.

QTD.

VAL. UNI.

VALOR

STATUS

UN

Nº COLAB.

CLASSIFICAÇÃO

MOTIVO

JUSTIFICAÇÃO

CHK

DT. FIM

AÇÕES

11/08/2026

Micro d 70 - Fase 1

1

Dobra teste

did

did

did

22

55,00

75,00

40,00 €

3.000,00 €

BOM

Mt

4

Baixa

11/08/2026

Micro d 70 - Fase 1

1

Dobra teste

did

did

did

16

55,00

56,00

40,00 €

2.240,00 €

BOM

Mt

4

Baixa

16/08/2026

Mobilização - Fase 1

1

Dobra teste

did

did

did

8

1,00

1,00

5.750,00 €

5.750,00 €

NORMAL

Mt

4

Baixa

RESUMO DE PERFORMANCE POR ATIVIDADE

ATIVIDADE

QTD. ORÇAMENTO (DIAS REGISTO)

PRODUÇÃO ACUMULADA

DIFERENÇA

STATUS RENDIMENTO (DIAS)

Micro d 70 - Fase 1

55,00

131,00

+76,00

1,4 dias ↑

Mobilização - Fase 1

1,00

1,00

0,00

0,0 dias ↑

RENDIMENTO NECESSÁRIO PARA ATINGIR O OBJETIVO

ATIVIDADE

QTD. PREVISTA

PRODUÇÃO ACUMULADA

POR REALIZAR

DIAS PREV.

DIAS REG.

DIAS REST.

REND. PREVISTO

REND. NECESSÁRIO/DIA

DIFERENÇA

ESTADO

Micro d 70 - Fase 1

2.580,00

131,00

2.389,00

46

1

45

55,00

52,64

-2,36

Dentro do previsto

Mobilização - Fase 1

1,00

1,00

0,00

1

1

0

1,00

0,00

0,00

Objetivo atingido

Production form, history and performance indicators.

Field	How to complete	Notes
Date	Day on which production was carried out.	Required.
Activity	Project activity and phase.	Only activities previously linked to the project are shown.
Equipment	Machine/equipment used.	Create it in the relevant master table if it is missing.
Machine Hours	Machine reading or accumulated hours.	The previous reading helps prevent decreasing values.
Project Manager	Project Manager.	Filled automatically from the activity.
General Foreman	General Foreman.	Filled automatically.
Activity Foreman	Activity Foreman.	Filled automatically.
Operator	Main operator.	Filled automatically.
Unit	Activity unit.	Automatic.
Planned Qty.	Total quantity planned for the activity.	Automatic.
Remaining Qty.	Quantity still to be produced.	Automatic: planned - cumulative production.
Unit Value	Activity unit price.	Automatic.
Productivity	Planned daily productivity.	Automatic.
Qty.	Quantity actually produced on the day.	Main manual field in the record.
Total	Production value for the day.	Calculated: Qty. x Unit Value.
No. Staff	Number of people who worked on the activity.	Record the actual team for the day.
Classification	Activity difficulty level.	Filled automatically.
Status	Compares daily quantity with planned productivity.	Calculated automatically.

Quick help - iProdGest Production

11

Field	How to complete	Notes
chk	Select when client acceptance of the work/value is not yet guaranteed.	The line is excluded from Total Completed while selected.
End Date	Completion/closing date, when applicable.	Use according to the project's internal procedure.
Reason	Reason for stoppage or loss of productivity.	Required when status is below 90%.
Hours	Stoppage hours.	Enter the time related to the reason.
Justification	Clear description of the occurrence.	Explain the reason and the measures taken.
Save Production	Adds the line to the history.	Review automatic fields before saving.

Production below 90%

Select a Reason and enter an objective Justification. Also record stoppage hours when applicable.

chk field

Use it for completed work whose acceptance by the client has not yet been confirmed. The record remains visible but is not added to Total Completed.

6.2 Understanding the status

Automatic calculation

The status compares the quantity produced during the day with the planned activity productivity.

Status	Result	Meaning
Good	Above 100%	Production above planned productivity.
Normal	Equal to 100%	Production exactly at planned productivity.
Attention	90% to 99%	Small deviation; record and monitor.
Problem	80% to 89%	Relevant deviation; justify it.
Serious	70% to 79%	High deviation; action is required.
Critical	Below 70%	Critical situation.
Unclassified	Productivity is blank or zero	Review the activity configuration.

6.3 Displayed indicators

Below the production form

The indicators summarise completed value, activity progress and the productivity required to meet the deadline.

Indicator	Meaning	Calculation / use
Planned Total	Sum of the planned sales value of project activities.	Planned quantity x unit value.
Completed Total	Value of recorded and accepted production.	Excludes rows with chk selected.
Remaining	Value still to be completed.	Planned total - completed total.
% Completed	Financial completion percentage.	Completed total / planned total.
Completed Work	List of all records.	Allows search, edit and delete.
Performance Summary	Compares cumulative production with productivity and recorded days.	Shows lead or delay in days.
Required Productivity	Daily productivity required to finish on time.	Shows On schedule, Reinforcement required or Delay risk.

7. Brief dashboard description

Dashboards vary according to the user role. They show information calculated from projects, activities, the annual budget and production records.

When a chart is empty

Check the year, period and filters. Also verify that budget, valued activities and production records exist for the selected interval.

Area	What it shows
Workspace / overview	Main account indicators, alerts, active projects and the overall production situation.
Production and productivity	Daily and cumulative production, productivity by activity, difficulty, manager, foreman and operator.
Planning and Gantt	Planned and actual dates, activity progress and comparison between plan and execution.
Annual budget	Production versus budget, daily control, execution by project type and branch.
Portfolio	Value in portfolio, value remaining and value to be secured, analysed by project and branch.
Invoicing and collection	Values by client, district, project type, responsible people and period, including work in progress and outstanding collection.
Equipment	Hours, production, use, productivity and profitability by equipment or type.
Stoppages	Stoppage hours and occurrences by reason, activity, project and period.

8. Checklist and common issues

Issue	Likely cause	How to solve
Empty list	The corresponding master table is missing data.	Use the "..." button or open the relevant configuration menu.
Role not recognised	The role does not match a supported profile.	Use one of the names shown in this manual.
User signs in without a profile	Staff Username differs from the User.	Correct them so that they are exactly the same.
Activity does not appear in production	The activity was not linked to the project.	Open Project Activities and save the activity/phase.
Dashboard shows zero	Budget, unit values or production are missing.	Also check the year and filters.
Completed total is lower than expected	Some rows have chk selected.	Review rows awaiting client acceptance.
A new project cannot be created	The plan limit may have been reached.	Open the Subscription menu.

- Company created and first access completed.
- Recognised roles reviewed or created.
- Categories and staff members registered.
- Staff Username identical to the login User.
- New users tested and active.
- Company structural cost defined.
- Branches created when applicable.
- Annual budget entered and checked.
- Clients, locations, project types and equipment available.
- First project created with responsibilities and contacts.

- Activities configured with quantities, prices, costs and productivity.
- First production record completed.
- Totals and dashboards show consistent values.