



SOFTWARE FACTORY

Labcare Cloud

Cloud platform for laboratory integration, traceability, and analytical management.

Official User Manual

zymDev Core Platform v5.5.2

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Cloud platform for laboratory integration, traceability, and analytical management.

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Available Modules & Functionalities

Below are the modules and views available in **Labcare Cloud**:

General

View	Submodule	Description	Link
Constants & Enums	-	The Constants (or Enums) Management view is the platform's technical module designed to manage lists of predefined values that f...	Open Manual
Contact Information	-	The Contact Information view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsA...	Open Manual
Default Options	-	The Default Options view is the system's analytical configuration section that allows coordinators and administrators to define de...	Open Manual
Release Notes & Changelogs	-	The Release Notes (or Changelogs) view is the official communication channel within the platform that details updates, improvement...	Open Manual
Work Shifts	-	The Shift Configuration view (or Shifts) is the administrative module responsible for delimiting and structuring the work schedule...	Open Manual

System Tools

View	Submodule	Description	Link
Audit Log	-	The Audit Log view (or Logs) is the system's security and traceability tool responsible for chronologically recording all operatio...	Open Manual
Communication Templates	-	The Template Management view is the system tool designed to centralize, design and manage the communication formats and documents...	Open Manual

View	Submodule	Description	Link
Data Mapping & Homologation	-	The Data Mapping and Homologation view (Mapper) is the integration engine designed to configure bidirectional file translation tem...	Open Manual
Incidents & Support	-	The Incident Management view is the centralized module for recording, reporting and tracking incidents, errors or requests for new...	Open Manual
Maintenance Scripts	-	The Script Console is an advanced level maintenance and support tool within the ERP, designed for the controlled execution of sche...	Open Manual

CMS Modules

View	Submodule	Description	Link
About Us	-	The About Us view in the CMS is the administrative module in charge of managing the main institutional content displayed on the pu...	Open Manual
Consumers & Success Stories	-	The Consumer view in the CMS is the module in charge of managing the list of featured clients, success stories and institutional t...	Open Manual
Contact Information (CMS)	-	The Contact Information view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsA...	Open Manual
Digital Products (CMS)	-	The Digital Products view in the CMS is the module that manages the catalog of software, applications, licenses or digital solutio...	Open Manual
FAQs	-	The Frequently Asked Questions (FAQs) view in the CMS is the manageable module designed to parameterize the common questions, quic...	Open Manual
Partnerships & Alliances	-	The Associations and Alliances view in the CMS is the module in charge of managing the catalog of agreements, strategic allies and...	Open Manual
Published Services (CMS)	-	The Published Services view in the CMS is the module where the offer of technological, professional or consulting services display...	Open Manual

General Modules

View	Submodule	Description	Link
Countries & States	-	The Country and State Configuration view is the module in charge of parameterizing the territorial division and geographic locatio...	Open Manual
Memberships & Licenses	-	The Membership Administration view is the module in charge of managing the licensing and payment plans applied to the different or...	Open Manual
Organizations	-	The Organization Administration view is the centralized module where the different legal or commercial entities registered in the...	Open Manual
Roles & Permissions	-	The Roles and Permissions Management view is the security module that allows you to define the access levels and privileges of use...	Open Manual
System Attributes	-	The Custom System Attributes view is the advanced management console designed to structure, customize, and manage the general dyna...	Open Manual
System Languages	-	The System Languages view is the internationalization administrative console (i18n) in charge of creating, consulting, editing a...	Open Manual
System Menus & Navigation	-	The System Menus view is the navigation architecture console responsible for configuring, creating, editing, deleting and exportin...	Open Manual
System Products	-	The System Products view is the administrative console in charge of the general administration of platform products and applicatio...	Open Manual
System References	-	The System References view is the administrative console in charge of consulting, registering, editing and deleting global system...	Open Manual
Tag Management	-	The Tag Management view is the module in charge of creating, consulting, editing, deleting and exporting visual tags for general s...	Open Manual
User Management	-	The User Administration view is the section of the platform that allows you to control the access of staff and collaborators to th...	Open Manual

Control Panel

View	Submodule	Description	Link
Control & Reagent Lots	-	The Control Lots and Reagents view is the quality control module responsible for recording, classifying and monitoring the life cy...	Open Manual
Instruments & Analyzers	-	The Instrument Configuration view (or Instruments) is the module in charge of registering, cataloging and integrating the physical...	Open Manual

Views and Functionalities Catalog

Release Notes and Changelogs

Description, Purpose and Objective

NOTE: The **Release Notes** (or Changelogs) view is the official communication channel within the platform that details updates, improvements, bug fixes and new functionalities implemented in the system.

A **Changelog** (or Change Log) is a structured document that chronologically compiles the modifications made to a specific version of the software. It is classified by **Category** (which corresponds to the platform product affected by the update, for example, PEEC or Quattrol 365) and indicates the **Version** number of the system.

The objective of this view is to keep users and administrators informed about the technical evolution of the platform, guaranteeing visibility of the optimizations and new tools made available to your organization.

Context of Use

This module is used by:

- **Super Administrators:** To record and publish detailed release notes when updates are released to production.
- **General Users:** To consult the history of improvements implemented in your product and understand how the new features of the platform work.

Possible Actions

1. View and Search Release Notes

Allows all users to view the general table of updates published in the system, which details:

- **Name:** Administrative identifier of the change (e.g. **Update Auth Flow**).
- **Title:** Public header visible to the user (e.g. **Mejoras en el inicio de sesión**).
- **Category:** Specific product affected by the update.
- **Description:** Narrative detail of the included optimizations or corrections.
- **Version:** Build version number code.
- **Registration Date:** Day the release note was published.

The top search bar lets you enter keywords (such as a product, version number, or concept) to instantly filter table rows.

[Imagen ilustrativa: Listado de Notas de Versión]

2. Add a New Release Note

To publish a system update:

1. Click the **"Add changelog"** button at the top right of the table.
2. Complete the information requested in the side form:
 - **Name:** Technical name of the change.
 - **Title:** Explanatory title that users will see.
 - **Category:** Select the product from the autocomplete list.
 - **Version:** Enter the version number.
 - **Description:** Write exhaustively the list of changes made.
3. Click **"Add"** to publish the note.

[Imagen ilustrativa: Formulario Agregar Notas de Versión]

3. Edit a Release Note

If you need to correct the wording or update the data of an existing release note:

1. Click **"Edit"** (pencil icon ) in the corresponding row.
2. The side form will open with the data pre-filled. Make the necessary changes.
3. Click **"Update"** to apply the changes immediately to the users' display.

[Imagen ilustrativa: Formulario Editar Notas de Versión]

4. Delete a Release Note

To delete a post from history:

1. Click **"Delete"** (trash icon ) in the action column of the release note.
2. Confirm the action in the security popup modal.

WARNING: Deleting a release note is permanent and irreversible in the system database.

[Imagen ilustrativa: Modal Confirmación de Eliminación de Nota de Versión]

5. Export Release Notes

Allows you to download the complete history of released release notes in **.CSV** format by clicking the download icon at the top right of the table.

[Imagen ilustrativa: Exportación de Notas de Versión]

Required Technical Permits

Access to this module is controlled by the following permissions in the user's role profile:

- **changelog_read** : Allows access to view and read the release notes table.
- **changelog_create** : Enables the action of adding new release notes.
- **changelog_update** : Allows you to edit and update the content of already published notes.
- **changelog_delete** : Authorizes deletion of records from the release notes database.
- **changelog_export** : Enables downloading changelog data in **.CSV** format.

Constant Management

Description, Purpose and Objective

NOTE: The **Constant Management** (or Enums) view is the platform's technical module designed to manage the lists of predefined values that feed the drop-down menus and static parameters of the entire system (such as currency types, billing frequencies, identification types or statuses).

A **Constant** (or Enumerator) is a predefined and static data value within the system. It consists of a **Value** (the main data, such as **USD**) and, optionally, a **Complement** (complementary information associated with the value, such as the symbol **\$\$** or a translation).

The goal of this view is to allow super administrators to add and update these master lists in real time without requiring changes at the code or database level.

Context of Use

This module is used by Product Managers and Super Managers to:

- **Update currencies and currencies:** Enable new types of currencies in the system for membership payments (e.g. enter the currency **EUR** with its symbol **€** in the **currencies** list).
- **Add payment frequencies:** Add operating frequencies for contracts or payroll (e.g. add **Semi-annual** to the **frequencies** list).
- **Parameterize dynamic lists:** Configure types of identification documents or geographic states enabled for user registration.

Possible Actions

1. View and List Constants by Category

Allows administrators to list all registered enumerators under a specific list:

1. Select the required constant category from the **Menu/Constant List** drop-down menu (for example, **currencies** or **frequencies**).
2. The system will immediately list all registered values on the screen, showing their code, name and associated plugins.

[Imagen ilustrativa: Listado de Constantes por Categoría]

2. Add a New Constant

To add a new value to one of the master lists:

1. Select the destination list from the **Menu/Constant List** drop-down field.
2. Fill out the required fields:
 - **New Element (Value):** Enter the primary key or value of the constant (e.g. **USD** or **Weekly**).
 - **Complement or subitem (Optional):** Enter the additional information required depending on the type of list (e.g. the symbol **\$\$** for the currency or a translation code).
3. Click the **"Add"** button to save the new item to the list. It will be reflected immediately in all the forms in the system that consume that enumerator.

[Imagen ilustrativa: Formulario Agregar Constante]

3. Delete a Constant

To remove an item from the list:

1. Locate the item and click the delete action (trash icon  or remove button).
2. Confirm the action in the pop-up window.

CAUTION: Do not delete constants that are being used in historical records (such as membership transactions, user profiles or active processes), as this would cause system loading failures when trying to recover the deleted value.

[Imagen ilustrativa: Modal Confirmar Eliminación de Constante]

Required Technical Permits

Access to this panel requires that the user's role has the following privileges:

- **enums_read** : Grants access to view, list selection, and reading constants.
- **enums_update** or **enums_create** : Allows the addition of new elements and plugins to constant lists.
- **enums_delete** : Allows you to delete elements from the system constant lists.

Communication and Contact Channels (CMS)

Description, Purpose and Objective

NOTE: The **Contact Information** view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsApp links, physical addresses and support emails displayed on the public front page are managed.

A **Contact Channel** defines the name of the channel, descriptive title, representative icon (Material Icons), type of contact (e.g. Telephone, Email, WhatsApp, Location), descriptive text or value of the contact data, direct web link (URL) and sorting priority.

The objective of this module is to offer visitors to the public portal immediate and updated means of communication with the company's support, sales and administration staff.

Context of Use

This module is used by:

- **Operations and Customer Service Administrators:** To update phone lines, support chat links or institutional emails.
- **System Administrators:** To enable or suspend service channels according to operational availability.

Possible Actions

1. Consult the List of Contact Channels

1. In the main administration table, display the contact channels with the columns: Name, Title, Icon, Contact Type, Description, URL, Priority, Registration Date and Actions.
2. Use the "**Search**" field to filter channels by type (e.g. WhatsApp, Email), name or description.
3. Sort the rows according to the level of attention priority.

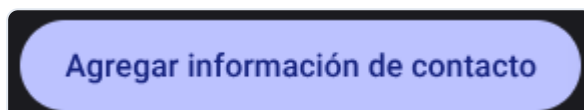
CMS > Informaciones de Contacto

Nombre	Título	Icono	Tipo de contacto	Descripción	URL	Prioridad	Fecha de registro	Acciones
No se encontraron registros								

Items por página: 20

2. Register a New Contact Channel

1. Click the **"Add Contact Information"** button.



2. Fill out the required fields on the side panel form:

- **Name:** Channel identifier (e.g. WhatsApp Attention, Support Email, National Line).
- **Title:** Explanatory header of the channel.
- **Icon:** Name of the icon from the Material Icons library (e.g. `phone`, `email`, `whatsapp`).
- **Type of contact:** Classification of the communication channel (Phone, Email, Social Network, Location).
- **Description:** Telephone number, email address or informative text of the channel.
- **URL:** Direct action link (e.g. `https://wa.me/...` or `mailto:...`).
- **Priority:** Integer to determine the position of the channel in the footer or contact section.

Nombre*
PEEC

Título*
Contacto PEEC

Icono

Tipo de contacto*
Phone

Descripción*
Contacto de PEEC

Link*
PEEC.com

Prioridad*
1

Agregar

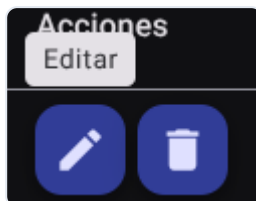
Cancelar

3. Save the record by clicking **"Save"**.

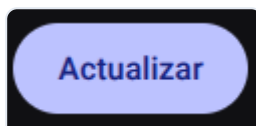


3. Edit a Contact Channel

1. Locate the channel in the table and click the edit button (pencil icon ) in the actions column.

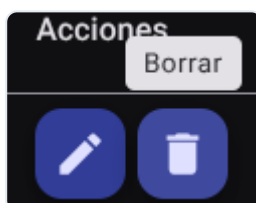


2. Modify the desired fields and save the changes to the **Save** button.

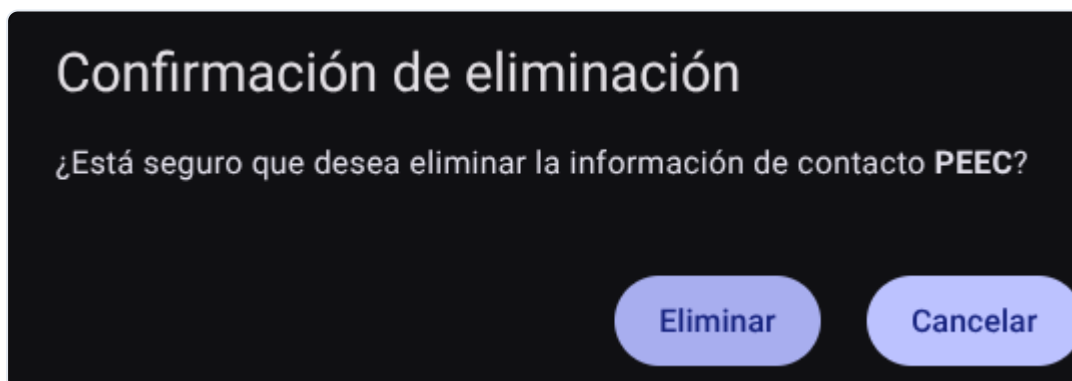


4. Delete a Contact Channel

1. To delete a channel, use the delete button (trash can icon ) in the actions column.

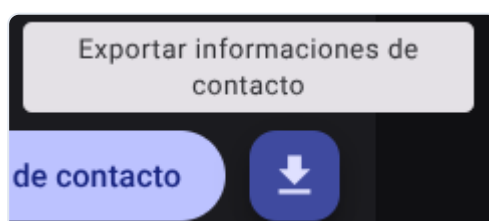


2. Confirm the action.



5. Export the Contact Channel Catalog

1. Click the **Export contact information** button (download icon). You will obtain a report in CSV/Excel format with the complete inventory of configured contact channels.



Required Technical Permits

- `contact_info_read` : Allows you to consult the configured contact channels.
- `contact_info_create` : Authorizes the addition of new service channels on the platform.
- `contact_info_update` : Enable updating phone data, emails, icons and priorities.
- `contact_info_delete` : Allows you to unpublish or delete contact channels.
- `contact_info_export` : Allows downloading of the complete contact information report.

Default Options Settings

Description, Purpose and Objective

NOTE: The **Default Options** view is the system analytic configuration section that allows coordinators and administrators to define default responses or preferred methods for different proficiency evaluation events (PEEC/POQTROL).

A **Default Option** (or Default Response) is a pre-loaded value in dynamic forms that is automatically presented to the user when they are going to enter their results. This data may include methods of analysis, preferred units of measurement, or common reagents.

The objective of this view is to optimize the data entry flow for participating organizations, reducing typographical errors and reducing the time required to complete reports.

Context of Use

This module is used by support staff or event coordinators to:

- **Preload common methods:** Establish the most used analytical methods for analytes in Clinical Chemistry, Hematology or Urinalysis events.
- **Clone configurations:** Copy the responses and parameters defined in a previous event to the current event to avoid manual re-entry of information.
- **Set up dynamic quizzes:** Link predefined questions and answers that participants will find on their entry forms.

Possible Actions

1. View Configuration by Event Type

The system organizes the interface into interactive tabs, each tab corresponding to a type of active event on the platform (for example, *Clinical Chemistry*, *Hematology* or *Uroanalysis*). Clicking on a tab loads the questions configured for that specific event.

[Imagen ilustrativa: Opciones por Defecto por Evento]

2. Configure Default Responses and Methods

To assign the default values that participants will see:

1. Select the tab of the event you want to configure.
2. For each question or analyte listed:
 - Select the recommended or default scanning method from the drop-down list.
 - Specify the instrument or unit if the form requires it.
 - Fill in numeric or text fields with the organization's standard responses.
3. Click the save button to register the default response template.

[Imagen ilustrativa: Configuración de Respuestas por Defecto]

3. Copy Options from Previous Events

To speed up the parameterization of a repetitive event:

1. Click the **"Copy from previous event"** or **"Copy previous responses"** button.
2. Select the historical event for which you want to import configuration data.
3. The system will overwrite the current fields with the imported information.
4. Make specific settings and save.

[Imagen ilustrativa: Copiar Opciones de Evento Anterior]

Required Technical Permits

The default response configuration is regulated by the following access keys:

- `default_options_read` : Allows you to enter the view and display the configured events.
- `default_options_update` or `default_options_create` : Enables field editing, default method assignment, and copying previous event configurations.

Work Shift Configuration

Description, Purpose and Objective

NOTE: The **Shift Configuration** (or Shifts) view is the administrative module in charge of delimiting and structuring the work schedules of the organization's technical staff to correlate analytical quality with the time of day and the operator in charge of the instrument.

A **Work Shift** in the system represents a work day defined by:

- **Name:** Name of the shift (e.g. *Morning Shift*, *Night Shift*).
- **Entry time:** Time the shift starts.
- **Departure time:** Time at which the analytical day ends.

The objective of this view is to record the distribution of the personnel's operating time, allowing the platform to automatically identify in which shift the quality controls were reported to issue traceability reports organized by time slots and operators.

Context of Use

This panel is operated by analytical coordinators and directors to:

- **Record the schedule:** Enter the laboratory shifts for purposes of assigning responsibilities.
- **Control time overlaps:** Prevent two shifts from being configured that coincide in the same time range (the system will automatically block overlapping schedules).
- **Analyze analytical performance by shift:** Filter reports and Levey-Jennings graphs by time slots to audit whether analytical derivations are concentrated in a specific shift (e.g. due to environmental thermal variations, operational fatigue or lack of homogenization of controls in night slots).

Possible Actions

1. Consult and Search Shifts

Displays a table with the catalog of shifts configured in the organization: Name, Start time, End time and Registration date. The search engine instantly filters by the shift name.

[Illustrative image: Work Shifts Catalog Table]

2. Create a Work Shift

1. Click **"Add shift"** in the upper right corner.
2. The form will be displayed in the side panel:
 - **Name:** Enter the descriptive name of the shift (e.g. *Afternoon Shift*).
 - **Entry time:** Indicate the start time of the analytical day with the clock.
 - **Departure time:** Please indicate the end time.
3. Click **"Add"** to save.

WARNING: Overlapping Schedule Rule: If the entry or exit times of the new shift coincide with any schedule already saved in the organization, the system will display an **Overlapping Shift** warning and will block the creation of the record until you correct the hours.

[Illustrative image: Shift Creation Form]

3. Edit a Shift

1. Click **"Edit"** (pencil icon ) in the shift row.
2. Modify the name or times in the side panel.
3. Click **"Update"** to apply the changes to the organization.

IMPORTANT: If the shift has already been used to classify historical quality control results or schedules, the system could restrict its time editing to safeguard the integrity of previous statistical reports.

4. Delete a Shift

1. Click **"Delete"** (trash icon ).
2. Confirm in the pop-up security dialog. The system will perform a logical deletion of the shift (`deleted: true`).

5. Export Shift Catalog

Click the download button in the table header to download the workdays and schedules in a **.CSV** file.

Required Technical Permits

Shift management is subject to the following permissions:

- `shifts_read` : Access to the panel and visualization of the shift table.
- `shifts_create` : Enables the action of adding shifts and time overlap validation.
- `shifts_update` : Grants permission to edit names and modify time ranges in the panel.
- `shifts_delete` : Enables logical removal of a shift.
- `shifts_export` : Authorizes the download of the catalog in `.CSV` format.

Audit Log

Description, Purpose and Objective

NOTE: The **Audit Log** (or Logs) view is the security and traceability tool of the system in charge of chronologically recording all operations and history of modifications made to the platform.

An **Audit Log** (or Traceability Record) is a computer file or record generated automatically by the system every time a user performs a creation, update or deletion action in the organization's database.

The goal of this view is to ensure information transparency and security, allowing auditors and administrators to track exactly what changes were made, when, and by whom.

Context of Use

This module is mainly used by auditors, information security officers and general administrators to:

- **Investigate bugs or inconsistencies:** Track suspicious or erroneous modifications to quality control settings or court files.
- **Comply with quality regulations:** Maintain complete traceability required by regulatory entities in health or legal management.
- **Compare data states:** Compare the previous state (**Before**) and the after state (**After**) of a modified record.

Possible Actions

1. Consult and Filter Audit Traces

Allows access to the complete history of events registered for the organization. The interactive table exposes the following details for each trace:

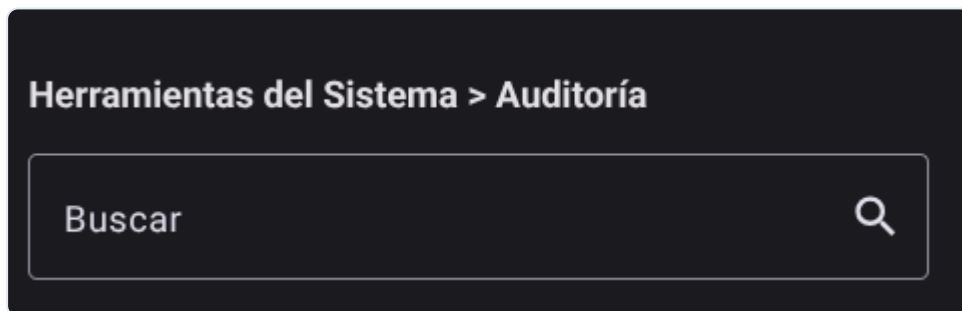
- **Visual Indicator:** A colored icon that summarizes the category of the operation:
 - **Green:** Creation of a new element.
 - **Blue:** Modification of an existing record.
 - **Red:** Deletion of system information.
- **Date:** Exact timestamp (day, month, year and hour) when the action was executed.
- **Description:** Detail that specifies the action performed, the name of the affected element and the menu or database collection where the event occurred.

- **Before:** Data structure in **JSON** (JavaScript Object Notation, a lightweight structured data exchange format) format that shows the values that the record had before the change.
- **After:** Data structure in **JSON** format that details the new values after the update is applied.

Herramientas del Sistema > Auditoría				
Buscar				
Fecha	Descripción	Antes	Después	Acciones
Aug 22, 2026, 5:18:07 PM	Actualizó Desconocido en el menú /user_projects	{}	{ "updated_date": "2026-08-22T22:18:07.191Z" }	
Aug 22, 2026, 5:17:58 PM	Creó Desconocido en el menú /user_projects	{}	{ "deleted": false, "start_date": "2026-08-02T05:00:00.000Z", "end_date": "2026-08-30T05:00:00.000Z", "hours_per_day": 8, "cost_per_hour": 1000, "user": "FoAgYtFMwKBNx7IUSP", "project": "EL3yJUI3jU0IOMzdTh0e", "role": "6r0MLFJ73ypGEF0zR0Z", "status": "ACTIVE", "created_date": "2026-08-22T22:17:57.665Z" }	
Aug 21, 2026, 7:28:47 PM	Creó etiqueta prueba en el menú /tags	{}	{ "deleted": false, "name": "etiqueta prueba", "description": "etiqueta prueba", "color": "#243aa8", "created_date": "2026-08-22T00:28:46.973Z", "id": "426f6ab7-ce73-471c-8433-6849563ae86b" }	

2. Search Specific Events

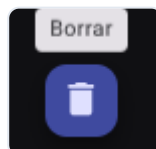
In the top bar, enter any term (such as the name of a menu, the name of a user, or a particular action). The table will update in real time showing only the records that match the search.



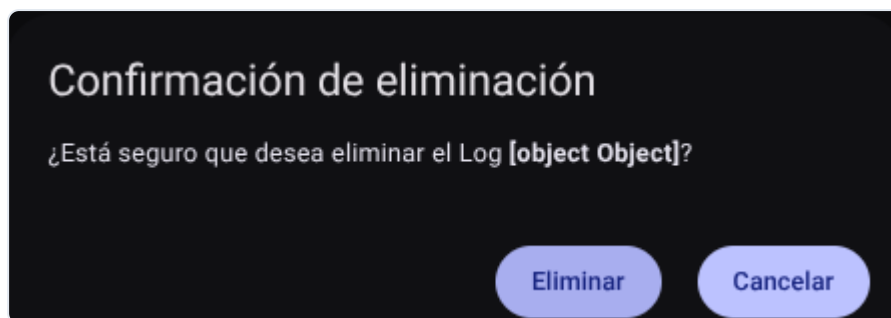
3. Delete a Log Record (If applicable)

If the administrator user has advanced log debugging permissions:

1. Locate the log trace you want to remove from the list and click the **"Delete"** button (trash icon 🗑️).



2. Confirm the deletion in the security pop-up modal. The record will be permanently deleted from the display table.



WARNING: Deleting audit logs is a critical security action. It is recommended to restrict this permission to the minimum possible staff to keep the chain of custody of the information intact.

Required Technical Permits

Access to and management of the audit log is controlled by the following privileges:

- `logs_read` : Allows you to enter the audit menu, list the traces and search among the events.
- `logs_delete` : Enables the action of deleting specific audit history entries.

Incident Management and Technical Support

Description, Purpose and Objective

NOTE: The **Incident Management** view is the centralized module for recording, reporting and tracking incidents, errors or requests for new features, with automatic synchronization to the development team's repository (GitHub).

An **Incident** is parameterized through the following sections:

- **1. Rating:**
- **Visibility*:** *Organizational* (visible for the entire organization) or *Personal* (visible only by whoever creates it).
- **Issue Type*:** *Bug*, *Feature* or *Task* (automatically assigns the corresponding tag in GitHub).
- **2. Detail:**
- **Title*:** Short summary of the reason or failure (minimum 5 characters).
- **Description*:** Detailed explanation of the case (supports Markdown format).
- **Steps to reproduce:** Optional indication of the exact sequence to replicate the bug.
- **Attachments:** Supporting evidence or screenshots.

The goal of this view is to allow users to report requests and continuously track the resolution status (*Open* or *Closed*).

Context of Use

This module is used by:

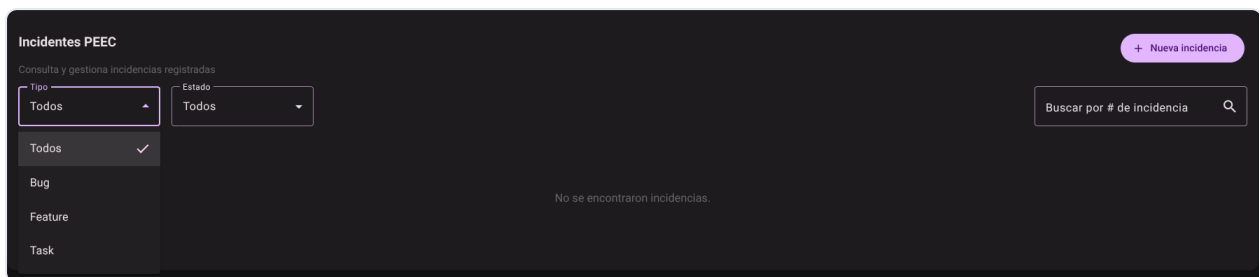
- **Users or Organization Operators:** To report technical non-conformities, screen errors or request improvements.
- **Technical Support Agents and Developers:** To audit, diagnose and track the progress of the registered ticket.

Possible Actions

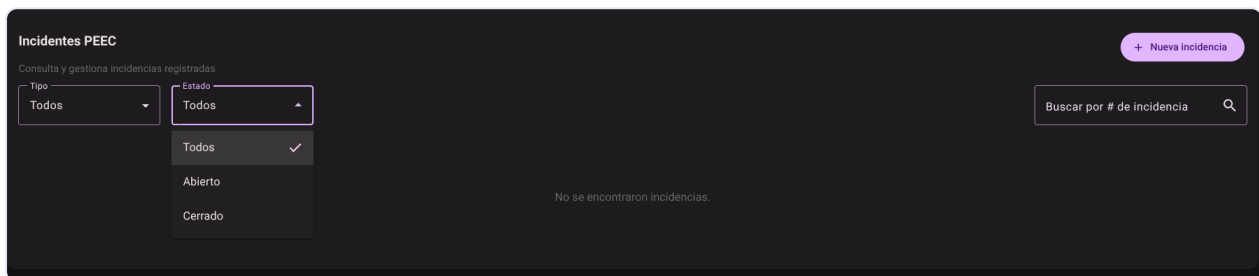
1. Consult and Filter Incidents

1. Use the drop-down menus at the top to filter by **Type** (*Bug*, *Feature*, *Task*) or by **Status** (*Open*, *Closed*).

2. Enter the code in the **"Search by Issue #"** field to find a specific ticket and check the progress status of its review.



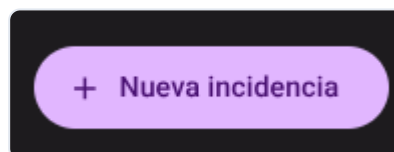
The screenshot shows the 'Incidentes PEEC' interface. At the top right is a '+ Nueva incidencia' button. Below the title, it says 'Consulta y gestiona incidencias registradas'. There are two dropdown menus: 'Tipo' (set to 'Todos') and 'Estado' (set to 'Todos'). To the right is a search bar labeled 'Buscar por # de incidencia'. Below the filters, a message states 'No se encontraron incidencias.'



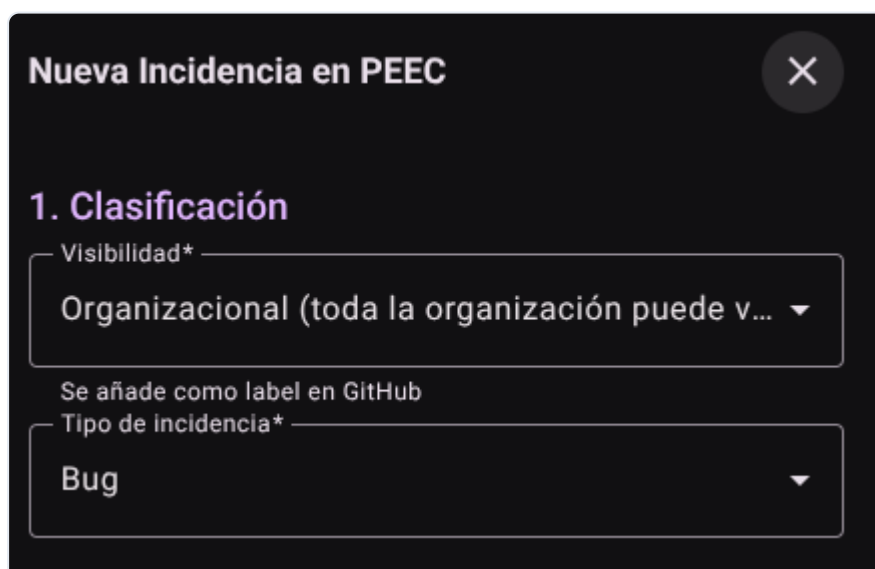
This screenshot is similar to the previous one, but the 'Estado' dropdown menu is open, showing three options: 'Todos' (selected), 'Abierto', and 'Cerrado'. The search bar and the 'No se encontraron incidencias.' message are still present.

2. Register a New Incident

1. Click the **++New Incident** button located in the upper right corner.



2. In the side panel that appears, define section **1. Rating**:
 - **Visibility:*** Choose between *Organizational* (visible to the entire organization) or *Personal* (visible only by whoever creates it).
 - **Issue Type:*** Select between *Bug*, *Feature* or *Task* (this option automatically assigns the corresponding tag in GitHub).



The screenshot shows the 'Nueva Incidencia en PEEC' form. At the top right is a close button (X). The section '1. Clasificación' is highlighted in blue. It contains two dropdown menus: 'Visibilidad*' (set to 'Organizacional (toda la organización puede v...') and 'Tipo de incidencia*' (set to 'Bug'). Below the 'Visibilidad*' dropdown, it says 'Se añade como label en GitHub'.

3. Complete section **2. Detail:**

- *Title:** Briefly summarize the reason or failure (minimum 5 characters).
- *Description:** Explains the case in detail (supports Markdown format).
- **Steps to reproduce:** (Optional) Indicates the exact sequence to replicate the failure in the system.
- **Attachments:** click the ****Add** button if you need to attach screenshots or supporting evidence.

2. Detalle

Título*

Descripción*

Pasos para reproducir

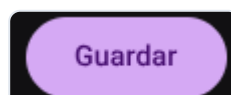
Opcional pero muy útil para reproducir el error.

Archivos Adjuntos
Opcional. Se subirán de forma segura.

Añadir

Cancelar Guardar

4. Press the **"Save"** button to submit the report (or **"Cancel"** to close the panel without keeping the changes). When you click Save, the ticket is recorded in the list and automatically creates the corresponding task/issue on GitHub for the development team.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Data Mapping and Homologation

Description, Purpose and Objective

NOTE: The **Data Mapping and Homologation** view (Mapper) is the integration engine designed to configure bidirectional file translation templates, allowing the organization to connect the reports generated by any analyzer or external laboratory computing system (LIS) without altering the platform's internal catalogs.

The mapping and homologation process is divided into integrated phases:

- **Input Mapping:** Defines which column of the imported file contains each data (e.g. Column 1 = Date, Column 2 = Test Code, Column 3 = Result). Allows you to apply **Cleaning** rules to remove unwanted characters (periods, spaces, letters).
- **Homologation:** It is the translation or equivalence table of vocabularies (e.g. translating the code "GLU" from the file to the "Glucosa" measurand in the database).
- **Output Mapping:** Defines the format and order in which a file exported by the system will be structured.
- **Converter and Import Module:** Diagnostic tools to test translations and import the resulting results to quality control directly.

The objective of this view is to automate the reception of external quality control data, eliminating manual typing and allowing flexible approval of multiple analytical codings centrally.

Context of Use

This panel is operated by systems engineers or quality assurance coordinators during:

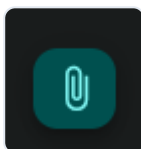
- **Connection of Analyzers:** Interconnect an automated device that exports its results in a specific CSV file.
- **LIS Systems Integration:** Configure input mapping for the organization's laboratory software.
- **Standardization of Reports:** Generate files with specific structures required by the quality audits of the headquarters.

Possible Actions through your Tabs

1. Configure Input (Tab)

Allows you to define how the uploaded results file will be read:

1. **Upload and Delimitation:** Upload a test file by clicking the paperclip icon , define a name for the configuration and the file delimiter symbol (e.g. comma , semicolon  or tab).

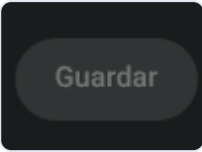


2. **Date and Time Format:** Type or select the temporary format of the file (e.g. `dd/MM/yyyy` `HH:mm:ss`).

3. **View and Organize Data:**

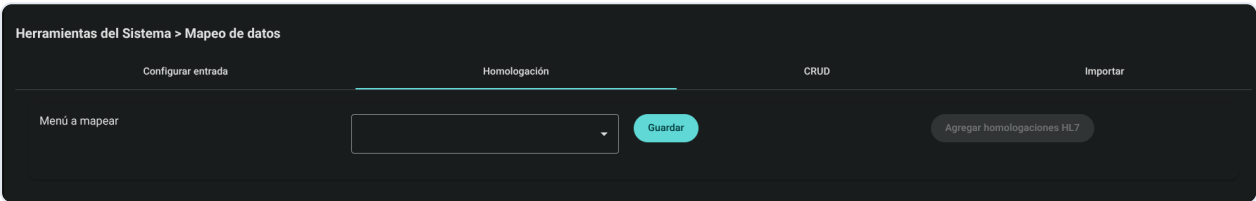
- Click **"Preview"** to open the file content viewer.
- In the table below, associate each system field (e.g. *Result*, *Test*, *Instrument*) to the column number of the file.
- **Character Cleaning:** If the file contains foreign characters attached to the number (e.g. `12.5 mg/dL`), set the discard positions (counting from the right) to extract only the clean number.

4. Click **"Save"**.

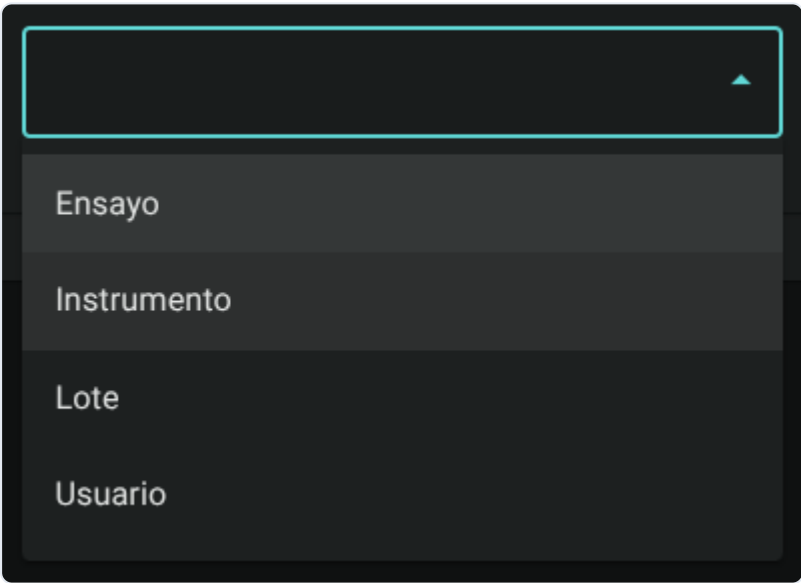


2. Homologation (Tab)

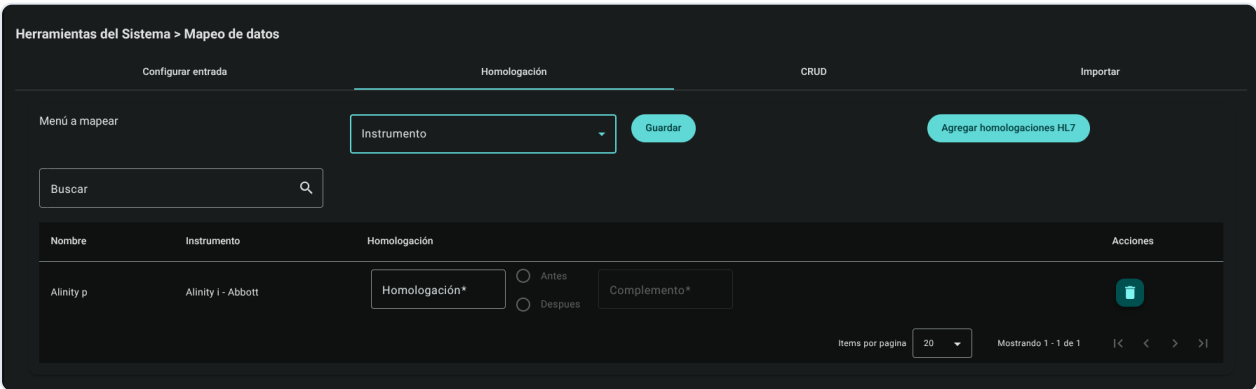
This section translates the terms in the uploaded file to the equivalents in the organization's master catalog:



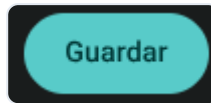
1. Select the mapping type at the top: **Per Assay**, **Per Instrument**, **Per Lot**, **Per Reagent Lot** or **Per User**.



2. The system will list the names found in the uploaded file below and a drop-down menu to the right to assign the approved element of the organization.



3. **Prefixes and Suffixes:** Optionally, configure a "plugin" to automatically add words before or after a mapped value (e.g. prepend a venue code).
4. Click **"Save"**.

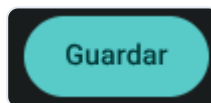


3. Configure Output (Tab)

Configure how the exported reports will be structured:

1. Define the name of the configuration, the output delimiter, and whether to include a header row.
2. Indicate whether you want to consolidate the date and time into a single column.
3. Map the columns in the desired order for the resulting CSV file.

4. Click **"Save"**.



4. CRUD (Tab)

Allows you to manage the database of input and output mappings saved in the organization:

- Shows the list of configurations.
- Allows you to edit its properties or delete obsolete configurations directly.

Herramientas del Sistema > Mapeo de datos

Configurar entrada Homologación **CRUD** Importar

Entradas

Buscar Relacionar entrada-salida

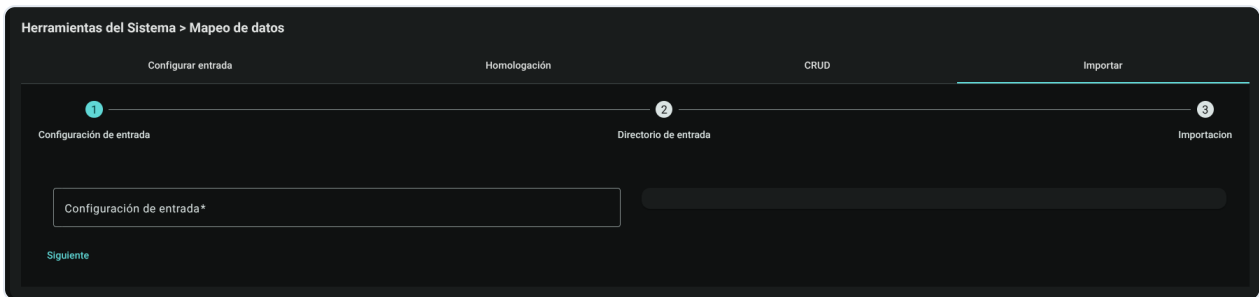
Nombre	Símbolo delimitador	Formato de fecha	Formato de hora	¿Con cabeceras?	¿Fecha y hora combinada?	Fecha de registro	Acciones
Alinity		ddMMyyyy	HHmmss	No	Si	17-10-2025	
E2E		YYYYMMDD	HHmmss	Si	No	23-10-2025	

Items por página: 20 Mostrando 1 - 2 de 2 |< < > >|

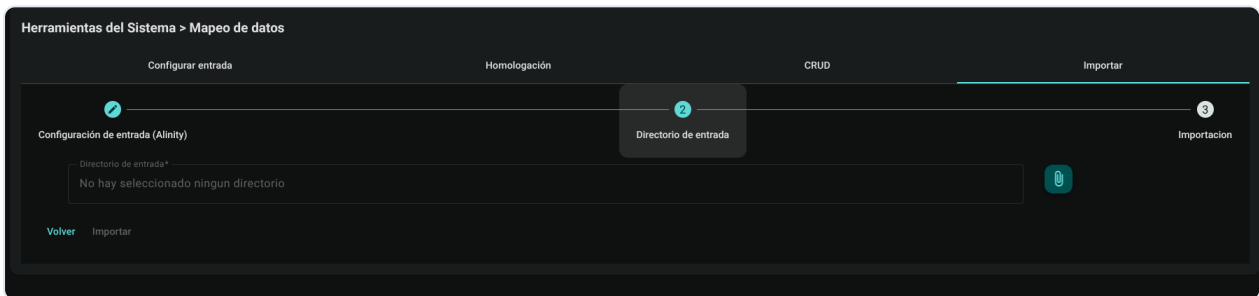
5. Import (Tab)

Once the mapping is configured and tested, this tab allows bulk input of the file results to the active database:

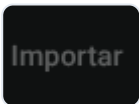
1. Select the corresponding entry and approval configuration.



2. Upload the team file.



3. Click **"Importar"**. The system will process the file, validate the Westgard rules and upload the results to the logs corresponding to each CC Test.



Technical Recommendations for Interoperability and Data Validation (LIS / Middleware)

TIP: Guidelines for Automation of Analytical Interfaces:

- **Standardization of Units and Factors in Homologation:** When connecting an automated analyzer via flat file (CSV/ASTM), verify that the internal coding of the instrument matches the unit of the master catalog in Quattrol. If the analyzer outputs measurements in alternative units or unconverted indices, apply appropriate approval to avoid artificial biases.
- **Validation of Sample Identifiers and Control Level:** Configure cleaning rules to discard control characters or alphanumeric rack prefixes that may prevent accurate assignment to Lot 1, Lot 2, or Lot 3 of the QC Test.

Required Technical Permits

Access to the integrator console requires:

- `data_mapping_setup_read` / `data_mapping_setup_create` / `data_mapping_setup_delete` (Tab Entry and CRUD).
- `data_mapping_homologation_read` / `data_mapping_homologation_create` (Homologation Tab).
- `data_mapping_output_read` / `data_mapping_output_create` (Configure Output Tab).
- `data_mapping_convertor_read` : (Converter Tab).
- `data_mapping_import_read` / `data_mapping_import_create` : (Import Tab).

Template Management

Description, Purpose and Objective

NOTE: The **Template Management** view is the system tool designed to centralize, design and manage the communication formats and documents automatically sent to users (such as welcome emails, news notifications and system alerts).

A **Template** is a predefined design that structures the content of a communication. It supports HTML (**innerHTML**) formatting to structure and style the design, and can include dynamic variables or parameters that the platform auto-populates with organization or user data upon submission.

The goal of this view is to allow administrators to maintain consistency in the design and content of all automated communications on the platform.

Context of Use

This module is used by Product Managers to:

- **Configure automatic notifications:** Design the system's official emails (for example, the confirmation email for entering quality control results or the notification email for a new judicial action).
- **Parameterize dynamic content:** Define fixed texts combined with variables that adapt in real time to each organization or user.
- **Validate visual rendering:** Use the real-time viewer to verify that the HTML code is displayed correctly before publishing or activating the template in production.

Possible Actions

1. View and List Templates

It allows administrators to consult the complete list of formats saved in the database through a table that details the name of the template, the title that users will see, the associated communication channel, the body of the template and the entry date.

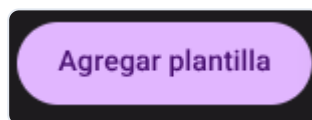
Herramientas del Sistema > Plantillas						
Buscar Q				Agregar plantilla 		
Nombre	Título	¿Tiene parámetros?	Canal	Cuerpo	Fecha de registro	Acciones
welcome_quattrol_template	Bienvenido a Quattrol365	Si	SMTP	Estimado usuario Labcare de Colombia le da la bienvenida a Quattrol365. A continuación relacionamos los datos de su institución: Nombre de la institución: <%= orgName %> Correo electrónico registrado: <%= email %> Ingrese aquí para asignar su contraseña. Nota. Este mensaje ha sido generado automáticamente, por favor no responda este correo	29-12-2025	
after_create_file_template	Se ha cargado un reporte para su PEEC ID	Si	SMTP	<div><p>Estimado cliente <%= peecID %></p><p><p style="font-size: 16px;">El reporte de sus resultados para el Programa de evaluación externo de la calidad PECO Unianalisis están ahora disponibles para descargar</p><p style="font-size: 16px;">Por favor ingrese aquí opción PEEC Reportes</p> </div>	29-12-2025	
welcome_peec_template	ENSAYO DE APTITUD PEEC	Si	SMTP	Estimado Participante Labcare de Colombia le da la bienvenida a su participación en el ensayo de aptitud PEEC. A continuación relacionamos los datos de su institución: Nombre de la institución:<%= orgName %> Correo electrónico registrado: <%= email %> Número de participante asignado: <%= peecID %> Ingrese aquí para asignar su contraseña. Nota. Este mensaje ha sido generado automáticamente, por favor no responda este correo	29-12-2025	
after_create_peec_template	Se ha realizado registro de una prueba	Si	SMTP	<div><p><p style="font-size: 16px;">Gracias por enviar sus resultados, la información que hemos recibido para <%= id_client %> es la siguiente:</p> <%= params %></div>	29-12-2025	
welcome_peec_quattrol_template	Bienvenido a Labcare Cloud	Si	SMTP	Estimado Participante Labcare de Colombia le da la bienvenida a su participación en el ensayo de aptitud PEEC y al software de control de calidad de Quattrol365. A continuación relacionamos los datos de su institución: Nombre de la institución: <%= orgName %> Correo electrónico registrado: <%= email %> Número de participante asignado: <%= peecID %> Ingrese aquí para asignar su contraseña. Nota. Este mensaje ha sido generado automáticamente, por favor no responda este correo	29-12-2025	

Items por pagina 20 Mostrando 1 - 5 de 5

2. Add a New Template

To design and incorporate a new template into the system:

1. Click the **"Add Template"** button at the top right of the table.

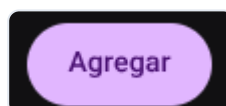


2. Fill out the form with the required fields:

- **Name:** Internal administrative name to identify the file (e.g. `email_bienvenida_usuario`).
- **Title:** Subject of the email or header of the message that the end user will receive (e.g. `Bienvenido a la Plataforma`).
- **Channel:** Communication medium through which the message will be sent (e.g. `Email`, `SMS`, `Notificación Interna`).
- **Does it have parameters?:** Check this box if the template will use structured dynamic variables.
- **Body (innerHTML):** Enter the template content written in HTML code to configure the styles, tables and images.
- **Display Preview:** At the bottom of the HTML editor, check the real-time preview section to check the layout of the elements.

Nombre* welcome_quattrol_template	Título* Bienvenido a Quattrol365
Canal * SMTP	☒ ¿Tiene parametros?
Cuerpo* <div><p>Estimado usuario Labcare de Colombia le da la bienvenida a Quattrol365. A continuación relacionamos los datos de su institución: Nombre de la institución: <%= orgName %> Correo	

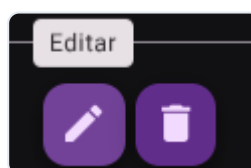
3. Click **"Add"** to register the template.



3. Edit a Template

To modify the layout or subject of a saved template:

1. Find the corresponding record and click **"Edit"** (pencil icon ).



2. The code and fields editor will load with the existing information. Make any desired modifications to the HTML code, parameters, or title.

Nombre*
welcome_quattrol_template

Titulo*
Bienvenido a Quattrol365

Canal *
SMTP

☒ ¿Tiene parametros?

Cuerpo*
<div><p>Estimado usuario

Labcare de Colombia le da la bienvenida a Quattrol365. A continuación relacionamos los datos de su institución:

Nombre de la institución: <%= orgName %>
Correo

Previa

Estimado usuario

Labcare de Colombia le da la bienvenida a Quattrol365. A continuación relacionamos los datos de su institución:

Nombre de la institución: <%= orgName %>

Correo electrónico registrado: <%= email %>

Ingrese [aquí](#) para asignar su contraseña.

Nota. Este mensaje ha sido generado automáticamente, por favor no responda este correo

Actualizar

Cancelar

3. Use the interactive preview to validate your changes.

Previa

Estimado usuario

Labcare de Colombia le da la bienvenida a Quattrol365. A continuación relacionamos los datos de su institución:

Nombre de la institución: <%= orgName %>

Correo electrónico registrado: <%= email %>

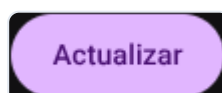
Ingrese [aquí](#) para asignar su contraseña.

Nota. Este mensaje ha sido generado automáticamente, por favor no responda este correo

Actualizar

Cancelar

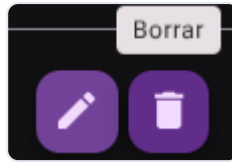
4. Click "**Update**" to apply the changes immediately to system notifications.



4. Delete a Template

To permanently delete a template:

1. Click the trash icon () of the record in the table.

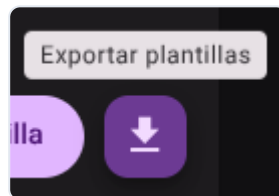


2. confirm the action in the popup modal.

CAUTION: Deleting a template is irreversible. The system will restrict deletion if the template is actively assigned to automated shipping flows configured in other menus.

5. Export Templates

Allows administrators to download the list of templates in **.CSV** format to perform external audits of channels and formats enabled on the platform.



Required Technical Permits

Access to this module requires that the administrator role has the following authorizations:

- `templates_read` or `templates_list` : Allows you to list and consult the template catalog in the table.
- `templates_create` : Enable the editor and the button to register new formats.
- `templates_update` : Grants access to modify the HTML code and fields of existing templates.
- `templates_delete` : Authorizes the definitive deletion of templates from the system.
- `templates_export` : Enables export of templates in data format.

Repair Scripts Console

Description, Purpose and Objective

NOTE: The **Script Console** is an advanced level maintenance and support tool within the ERP, designed for the controlled execution of routines and programmed commands that operate directly on the organization's databases in real time.

A **Repair Script** (or Maintenance Script) is a previously compiled and tested code routine that performs tasks of mass data correction, index restructuring, recalculation of historical accumulations or forced activation of services that cannot be performed through standard user interfaces.

The goal of this view is to provide the development support team and super administrators with a unified console to perform immediate technical repairs and deployments without the need for service outages or application updates.

Context of Use

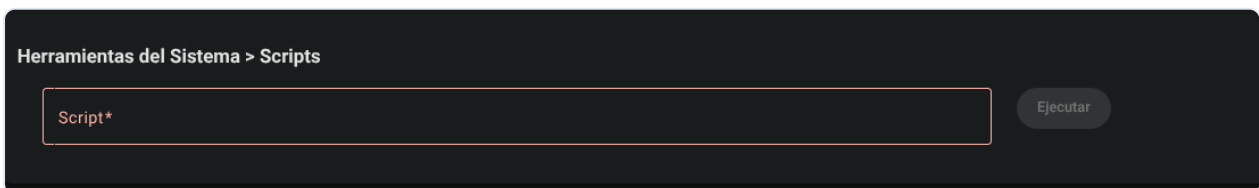
This advanced dashboard is restricted exclusively to Senior Support Engineers and Super Administrators to:

- **Fix massive inconsistencies:** Repair damaged or orphaned records generated by random network failures.
- **Recalculate reports:** Force manual recalculation of metrics on historical quality events.
- **Hot Updates:** Run database patches directly from the administration web frontend securely.

Possible Actions

1. Select a Script from the Gallery

The system has a catalog of predefined scripts.

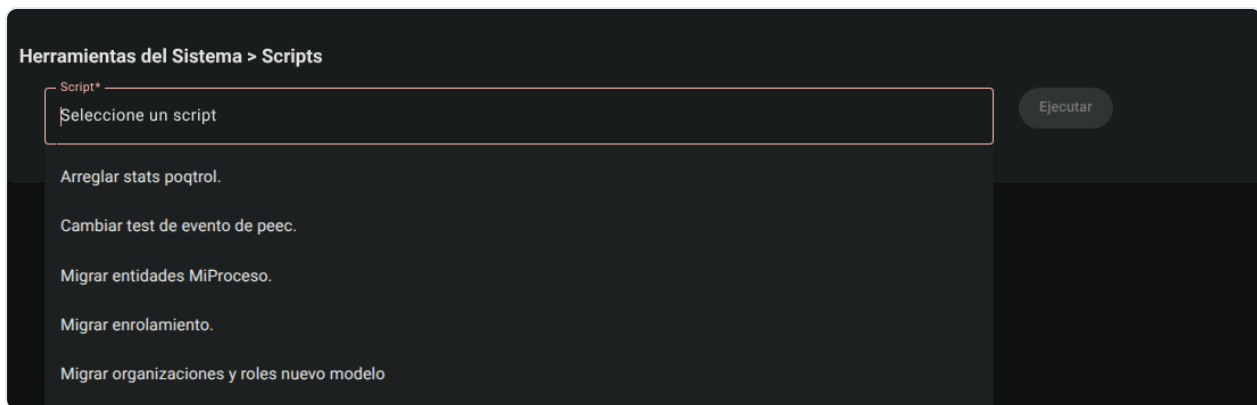


Herramientas del Sistema > Scripts

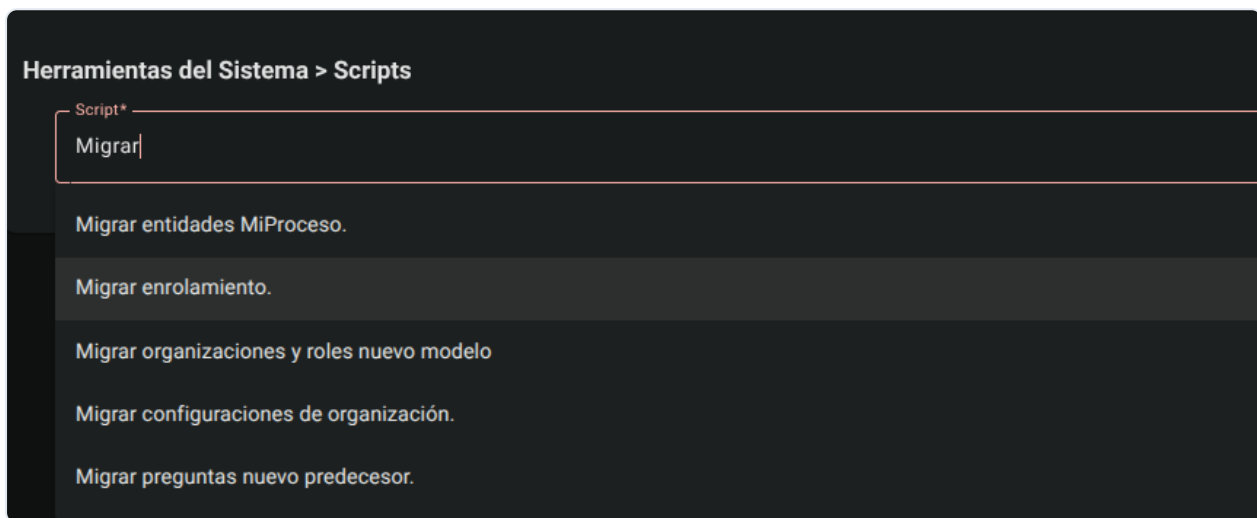
Script*

Ejecutar

1. Click the **Script** field.



2. Type keywords for the script you want to run or view the autocomplete list.

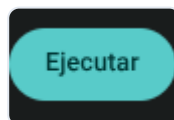


3. Select the required script.

2. Run Maintenance Script

Once the script is selected:

1. Click the **"Run"** button.



2. The button will change to a loading spinner while the code routine runs on the database server.
3. Upon completion, the system will display a pop-up notification message confirming the success of the operation or detailing the modified records.

CAUTION: Running database scripts hot is a high risk operation. Make sure you make a backup and have validated the script in test environments before proceeding with its execution in production.

Roles and Permissions Required

To access and interact with this advanced administration module, the user must have a **IT Support** or **Super Administrator** role and have the following specific permissions active:

- **Access and display:** `data_migration_read` (for general restructuring consoles) or `migrate_lab_new_model_read` (for updating laboratories to v2).
- **Write and run operations:** `data_migration_create` / `data_migration_update` or `migrate_lab_new_model_create` / `migrate_lab_new_model_update` that allow scripts to be launched on the production database.

Partnership and Alliance Management (CMS)

Description, Purpose and Objective

NOTE: The **Associations and Alliances** view in the CMS is the module in charge of managing the catalog of agreements, strategic allies and linked brands that are displayed on the platform's public portal.

An **Association** is an institutional record composed of the name of the ally, descriptive title, official logo, summary of the alliance and link to its website or information page.

The objective of this module is to provide visibility to the organization's institutional and commercial alliances in a dynamic and centralized way.

Context of Use

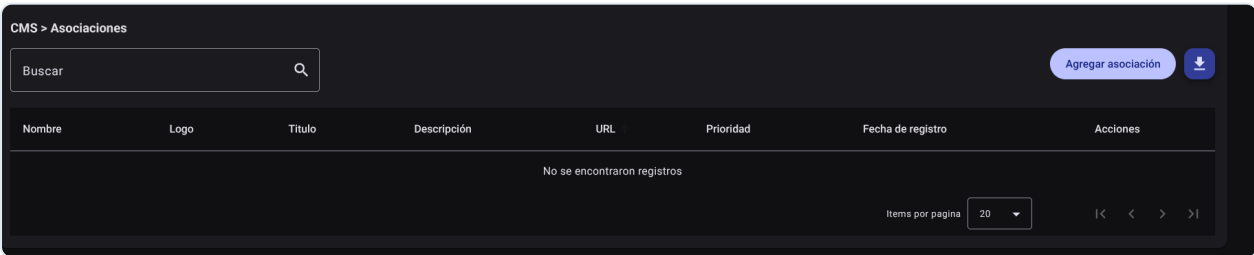
This module is used by:

- **Content and Marketing Administrators:** To publish new agreements, update institutional logos or adjust the official links of allies.
- **System Administrators:** To enable or disable associations in the institutional portal.

Possible Actions

1. Consult the Catalog of Associations

1. In the main table, display the list of registered associations.
2. Use the **"Search"** search field to filter by ally name, title, or description.
3. Sort the table columns (Name, Title, State) as necessary.

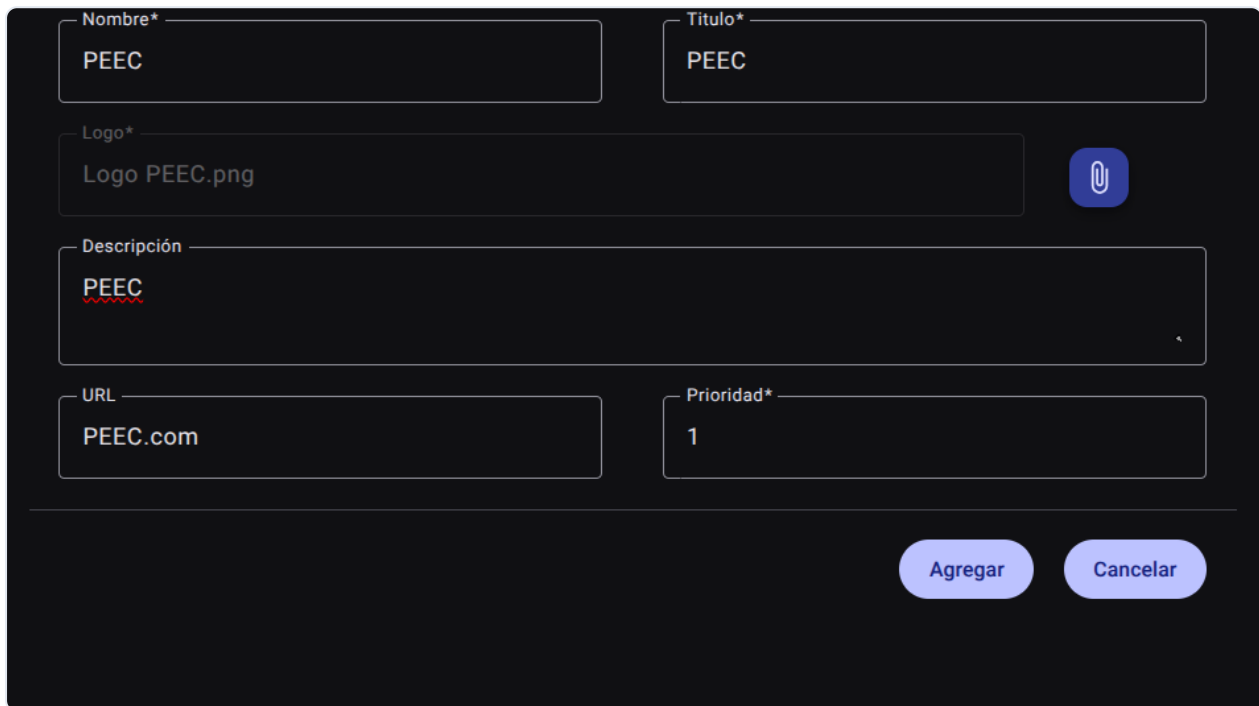


2. Register a New Association

1. Click the **"Add Association"** button.

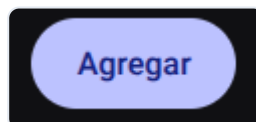
2. Complete the data in the drop-down side form:

- **Name of Ally:** Commercial or institutional identifier of the entity.
- **Title:** Slogan or short title of the alliance.
- **Logo (URL / File):** Direct link or upload of the official logo.
- **Description:** Brief summary of the benefits or scope of the agreement.
- **Destination URL:** Official website link of the ally.
- **Status:** Active/Inactive.



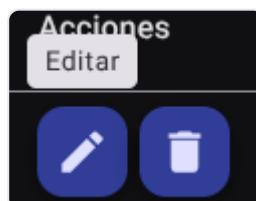
A form for adding a new ally association. It contains several input fields: 'Nombre*' with the value 'PEEC', 'Titulo*' with the value 'PEEC', 'Logo*' with the value 'Logo PEEC.png' and a file upload icon, 'Descripción' with the value 'PEEC', 'URL' with the value 'PEEC.com', and 'Prioridad*' with the value '1'. At the bottom right, there are two buttons: 'Agregar' and 'Cancelar'.

3. Click "Add".



3. Edit or Delete an Association

1. Locate the association in the table and click the edit button (pencil icon ) in the actions column.

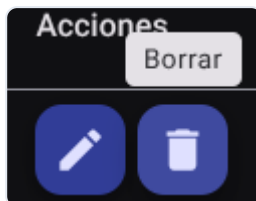


2. Modify the desired fields and save the changes to the **Save** button.

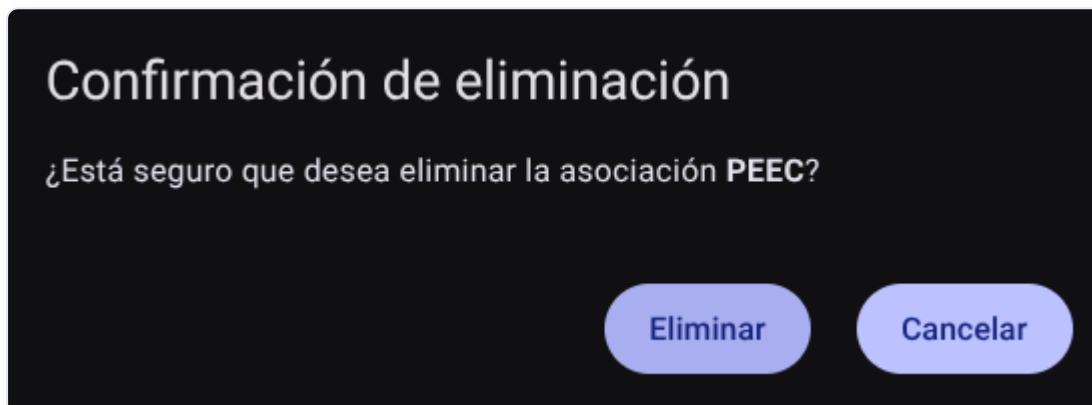


4. Delete an Association

1. To unsubscribe from an alliance, use the delete button (trash can icon ) in the actions column.

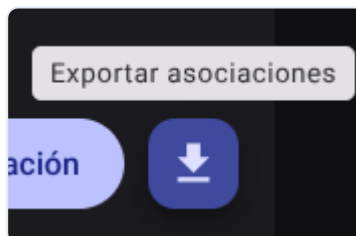


2. confirm the action.



5. Export the Association Catalog

1. Click on the button with the download icon (**Export associations**), a file in Excel/CSV format will be generated and downloaded with the complete list of registered agreements.



Required Technical Permits

- `partnership_read` : Allows you to view the list of associations and alliances.
- `partnership_create` : Authorizes the registration of new alliances in the CMS.
- `partnership_update` : Enables updating logos, links and descriptions.
- `partnership_delete` : Allows you to remove or inactivate agreements from the catalog.
- `partnership_export` : Allows you to download the massive association report.

Consumer Management (CMS)

Description, Purpose and Objective

NOTE: The **Consumers** view in the CMS is the module in charge of managing the list of notable clients, success stories and institutional testimonials that are displayed on the public portal (*landing page*) of the platform.

A **Consumer** is a record that represents an entity or corporate user that is a client of the platform, and includes its name, official logo, representative title, description of the impact or testimonial, web link and order of display priority.

The objective of this module is to manage the elements of social proof and institutional credibility shown to visitors to the web portal.

Context of Use

This module is used by:

- **Content and Marketing Administrators:** To publish new logos of corporate clients, update usage testimonials and define the order of visual relevance of success stories.
- **System Administrators:** To keep the list of platform clients updated.

Possible Actions

1. Consult the List of Consumers and Clients

1. In the main table, see the registered customers with the columns: Name, Logo, Title, Description, URL, Priority, Registration Date and Actions.
2. Use the "**Search**" field to filter the listing by customer name, title, or description.
3. Click the column headings to sort alphabetically or by priority.

CMS > Consumidores

Buscar

Agregar consumidor

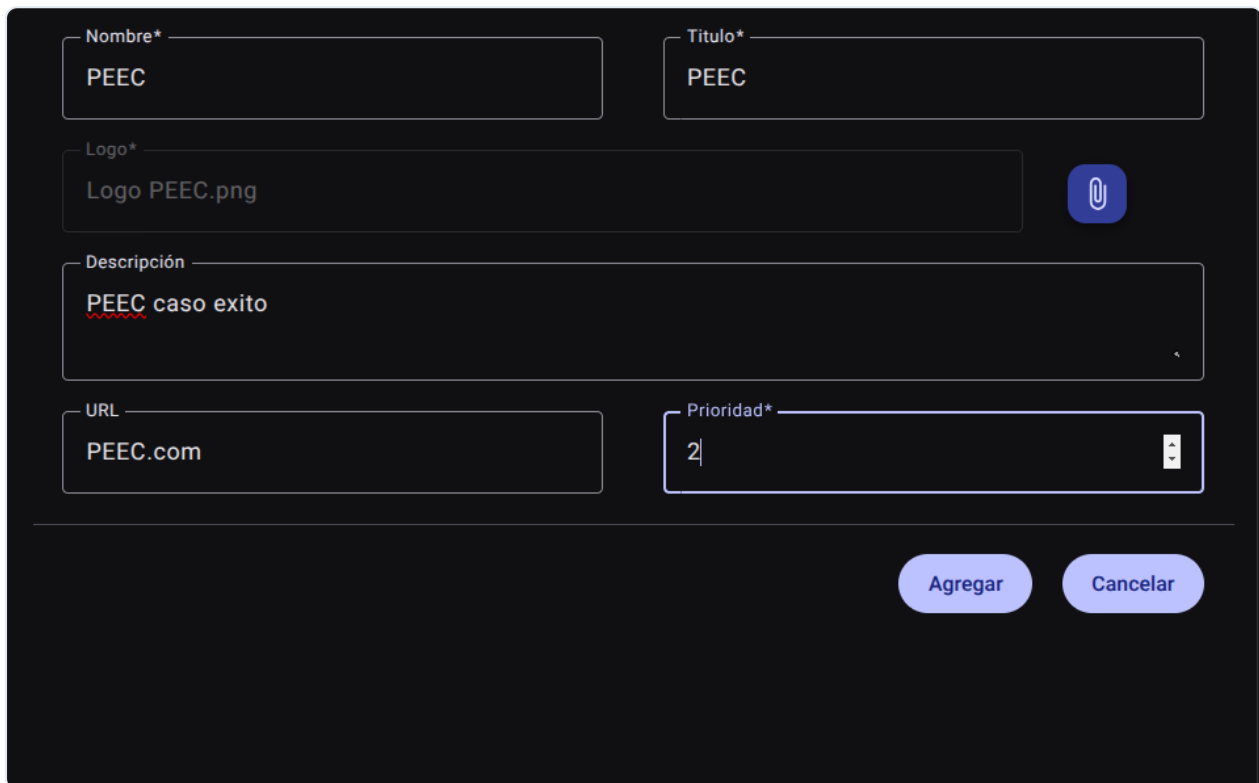
Nombre	Logo	Título	Descripción	URL	Prioridad	Fecha de registro	Acciones
No se encontraron registros							

Items por página20

|<<>>|

2. Register a New Consumer or Client

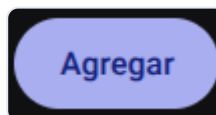
1. Click the **"Add Consumer"** button.
2. Fill in the requested information on the side panel:
 - **Name:** Company name or commercial name of the client.
 - **Title:** Descriptive heading or title of the reference.
 - **Logo (URL / File):** Official logo link or upload.
 - **Description:** Customer testimonial or success story.
 - **Link:** Official client web link (optional).
 - **Priority:** Integer number that defines the order of appearance on the public front page.



The form is a dark-themed side panel with the following fields and controls:

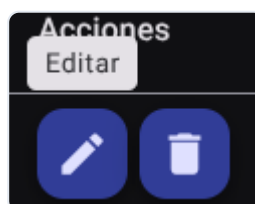
- Nombre***: Text input containing "PEEC".
- Titulo***: Text input containing "PEEC".
- Logo***: File upload area showing "Logo PEEC.png" and a blue paperclip icon.
- Descripción**: Text area containing "PEEC caso exito".
- URL**: Text input containing "PEEC.com".
- Prioridad***: Number input containing "2".
- At the bottom right are two buttons: **Agregar** (blue) and **Cancelar** (light blue).

3. Click **"Add"**.

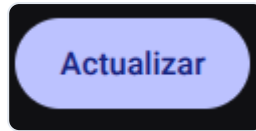


3. Edit or Delete a customer

1. Locate the consumer in the table and click the edit button (pencil icon ) in the actions column.

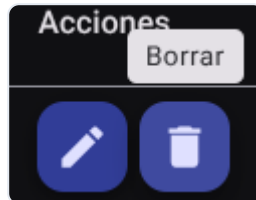


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a consumer

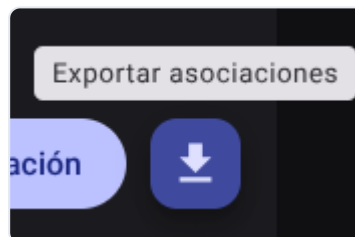
1. To unsubscribe a consumer, use the delete button (trash can icon ) in the actions column.



2. confirm the action.

5. Export the Consumer Catalog

1. Click the download button (**Export Consumers**). A CSV/Excel file will be generated and downloaded with the complete list of clients and parameterized testimonials.



Required Technical Permits

- `consumer_read` : Allows you to view the catalog of registered consumers and clients.
- `consumer_create` : Authorizes the registration of new customer testimonials and logos.
- `consumer_update` : Enables editing of data, logos and appearance priorities.
- `consumer_delete` : Allows the removal of clients from the catalog.
- `consumer_export` : Allows the download of the consumer report.

Frequently Asked Questions and Help Center (CMS)

Description, Purpose and Objective

NOTE: The **Frequently Asked Questions (FAQs)** view in the CMS is the manageable module designed to parameterize the common questions, quick guides and official answers presented in the support section of the public portal.

A **Frequently Asked Questions (FAQ)** consists of a category or topic name, an identifying icon (Material Icons), the question asked by the user, the official response written by the organization and the priority level for its ordering on the screen.

The objective of this module is to provide self-service information to end users, reducing the volume of repetitive requests to the help desk.

Context of Use

This module is used by:

- **Technical Support and Customer Service Agents:** To document responses to recurring questions raised by users.
- **Content and Communication Managers:** To structure and prioritize the most relevant help topics according to the season or product update.

Possible Actions

1. Consult the List of Frequently Asked Questions

1. In the main FAQs table, view the records stored with the columns: Name (Category), Icon, Question, Answer, Priority, Record Date and Actions.
2. Use the "**Search**" field to filter questions or answers by keywords.
3. Sort columns by topic or display priority.

CMS > FAQs

Buscar

Agregar FAQ

Nombre	Icono	Pregunta	Respuesta	Prioridad	Fecha de registro	Acciones
No se encontraron registros						

Items por pagina

20

|<

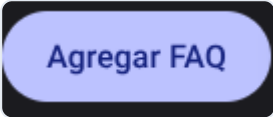
<

>

>|

2. Register a New FAQ

1. Click the "Add FAQ" button.



2. Complete the information requested in the form on the side panel:
- **Name:** Topic or category to which the question belongs (e.g. Account, Payments, Technical Support).
 - **Icon:** Name of the Material Icons icon to visually accompany the category.
 - **Question:** Clear and concise formulation of the user's concern.
 - **Answer:** Detailed explanation and step by step solution.
 - **Priority:** Numeric value to define the order in the portal drop-down list.

Nombre*

PEEC

Icono

Prioridad*

1

Pregunta*

Configuración en ambiente x

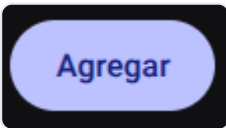
Respuesta*

Configuración completa

Agregar

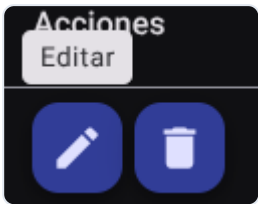
Cancelar

3. Click "Add".

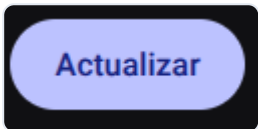


3. Edit an FAQ

1. Locate the FAQ in the table and click the edit button (pencil icon ) in the actions column.

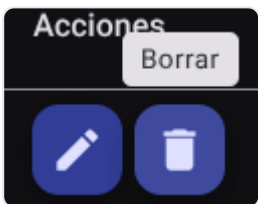


2. Modify the desired fields and save the changes to the **Save** button.

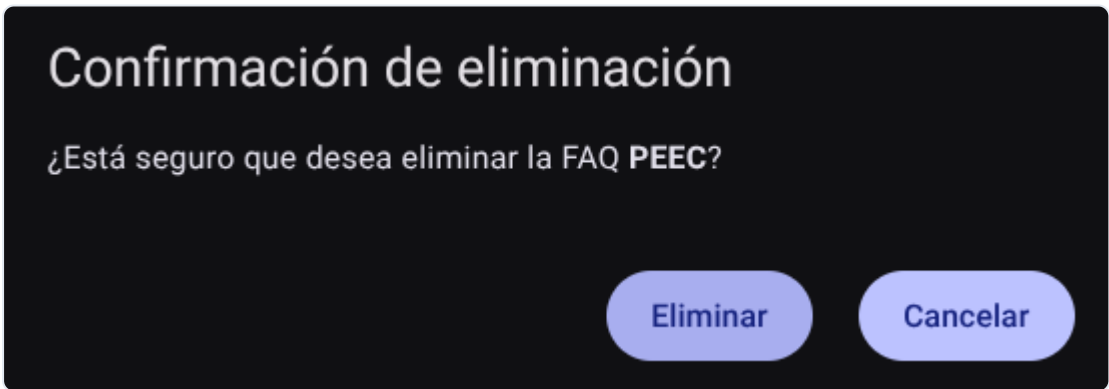


4. Delete an FAQ

1. To unsubscribe from an FAQ, use the delete button (trash can icon ) in the actions column.

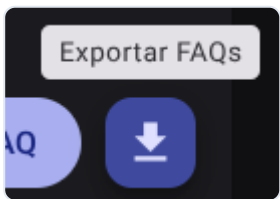


2. confirm the action.



5. Export the FAQ Registry

1. Click the **Export FAQs** button (download icon). A CSV/Excel file will be generated and downloaded with all the questions and answers configured.



Required Technical Permits

- `faq_read` : Allows you to consult the frequently asked questions catalog.
- `faq_create` : Authorizes the registration of new FAQs.
- `faq_update` : Enables editing of questions, answers, icons and priorities.
- `faq_delete` : Allows the removal of FAQs from the portal.
- `faq_export` : Allows downloading of the complete FAQ report.

Communication and Contact Channels (CMS)

Description, Purpose and Objective

NOTE: The **Contact Information** view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsApp links, physical addresses and support emails displayed on the public front page are managed.

A **Contact Channel** defines the name of the channel, descriptive title, representative icon (Material Icons), type of contact (e.g. Telephone, Email, WhatsApp, Location), descriptive text or value of the contact data, direct web link (URL) and sorting priority.

The objective of this module is to offer visitors to the public portal immediate and updated means of communication with the company's support, sales and administration staff.

Context of Use

This module is used by:

- **Operations and Customer Service Administrators:** To update phone lines, support chat links or institutional emails.
- **System Administrators:** To enable or suspend service channels according to operational availability.

Possible Actions

1. Consult the List of Contact Channels

1. In the main administration table, display the contact channels with the columns: Name, Title, Icon, Contact Type, Description, URL, Priority, Registration Date and Actions.
2. Use the "**Search**" field to filter channels by type (e.g. WhatsApp, Email), name or description.
3. Sort the rows according to the level of attention priority.

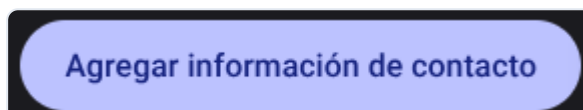
CMS > Informaciones de Contacto

Nombre	Título	Icono	Tipo de contacto	Descripción	URL	Prioridad	Fecha de registro	Acciones
No se encontraron registros								

Items por página 20

2. Register a New Contact Channel

1. Click the **"Add Contact Information"** button.



2. Fill out the required fields on the side panel form:

- **Name:** Channel identifier (e.g. WhatsApp Attention, Support Email, National Line).
- **Title:** Explanatory header of the channel.
- **Icon:** Name of the icon from the Material Icons library (e.g. `phone`, `email`, `whatsapp`).
- **Type of contact:** Classification of the communication channel (Phone, Email, Social Network, Location).
- **Description:** Telephone number, email address or informative text of the channel.
- **URL:** Direct action link (e.g. `https://wa.me/...` or `mailto:...`).
- **Priority:** Integer to determine the position of the channel in the footer or contact section.

Nombre*
PEEC

Título*
Contacto PEEC

Icono

Tipo de contacto*
Phone

Descripción*
Contacto de PEEC

Link*
PEEC.com

Prioridad*
1

Agregar

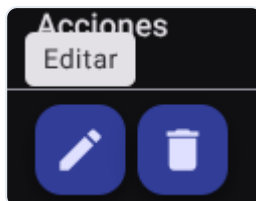
Cancelar

3. Save the record by clicking **"Save"**.

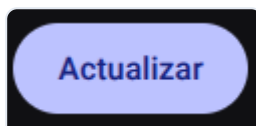


3. Edit a Contact Channel

1. Locate the channel in the table and click the edit button (pencil icon ) in the actions column.

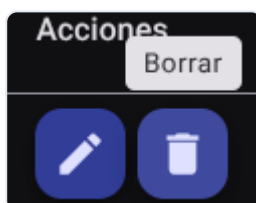


2. Modify the desired fields and save the changes to the **Save** button.

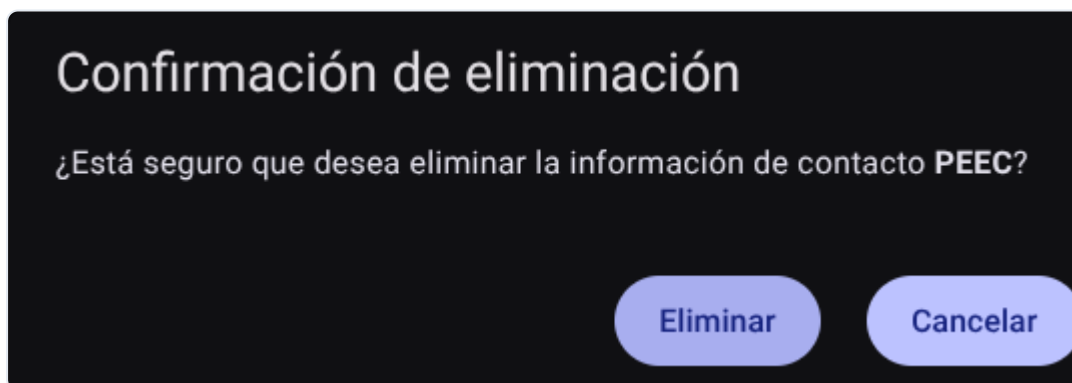


4. Delete a Contact Channel

1. To delete a caal, use the delete button (trash can icon ) in the actions column.

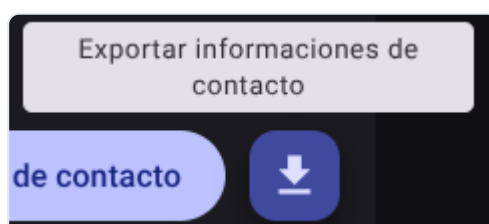


2. confirm the action.



5. Export the Contact Channel Catalog

1. Click the **Export contact information** button (download icon). You will obtain a report in CSV/Excel format with the complete inventory of configured contact channels.



Required Technical Permits

- `contact_info_read` : Allows you to consult the configured contact channels.
- `contact_info_create` : Authorizes the addition of new service channels on the platform.
- `contact_info_update` : Enable updating phone data, emails, icons and priorities.
- `contact_info_delete` : Allows you to unpublish or delete contact channels.
- `contact_info_export` : Allows downloading of the complete contact information report.

Institutional Information (About Us)

Description, Purpose and Objective

NOTE: The **About Us** view in the CMS is the administrative module in charge of managing the main institutional content that is displayed on the public landing page (*landing page*) of the platform.

The **About Us** section defines the organizational identity through a representative name, a title or main slogan, an institutional descriptive text and an external link to additional corporate resources.

The objective of this module is to allow an agile and centralized update of the official presentation of the company without requiring modifications to the source code.

Context of Use

This module is used by:

- **Content and Communication Managers:** To update the value proposition, institutional mission or general description of the organization.
- **System Administrators:** To adjust the official corporate links presented on the public front page of the portal.

Possible Actions

1. View Current Institutional Information

1. Upon entering the module, a central information card is presented with the data currently published:
 - **Name:** Official name of the entity or product line.
 - **Title:** Slogan or main heading visible on the cover.
 - **Description:** Detailed institutional text (up to 140 characters).
 - **Link:** External web link configured to expand the information.

Sobre nosotros

Nombre

Descripción

Link

Titulo

2. Modify Institutional Information

1. In the upper right corner of the card, click the edit button (pencil icon).



2. The **Edit Form** side panel will be displayed with the following fields:

- **Name:** Required text field.
- **Title:** Required text field.
- **Link:** Optional corporate redirect URL.
- **Description:** Text area required for the institutional description (maximum 140 characters).

Nombre*
zymdev

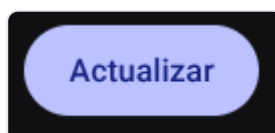
Titulo*
zymdev

Link
https://zymdev-zymflow-develop.web.app/

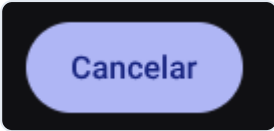
Descripción*
zym app

Actualizar Cancelar

3. Click the **"Update"** button to apply the changes to the public front page.



4. If you want to discard the modifications without saving, click **"Cancel"**.

A blue button with rounded corners and a dark blue border, containing the word "Cancelar" in a dark blue, sans-serif font. The button is centered within a black rectangular area.

Cancelar

Required Technical Permits

- `about_us_read` : Allows reading and viewing current institutional information.
- `about_us_update` : Authorizes the modification and update of the text, title and link of the About Us section.

Digital Product Catalog (CMS)

Description, Purpose and Objective

NOTE: The **Digital Products** view in the CMS is the module that manages the catalog of software, applications, licenses or digital solutions displayed on the organization's public website.

A **Digital Product** includes the name of the system or application, commercial title, distinctive icon (Material Icons), detailed description of features, access link or landing of the product, demonstration video URL and ordering priority.

The objective of this module is to position the company's suite of technological products, making it easier for visitors to explore its functionalities and access demos or official sites.

Context of Use

This module is used by:

- **Product and Marketing Managers:** To add new digital products to the web catalog, update features from recent versions or embed demo videos.
- **System Administrators:** To define the visual priority and availability of products on the cover.

Possible Actions

1. Consult the Product Catalog

1. In the product management table, review the columns: Name, Title, Icon, Description, URL, Video, Priority, Registration Date, and Actions.
2. Filter using the "**Search**" text box for any product term.
3. Sort the rows by display priority or by creation date.

CMS > Productos

Buscar

Agregar producto

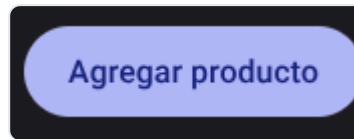
Nombre	Título	Icono	Descripción	URL	Video	Prioridad	Fecha de registro	Acciones
No se encontraron registros								

Items por página

20

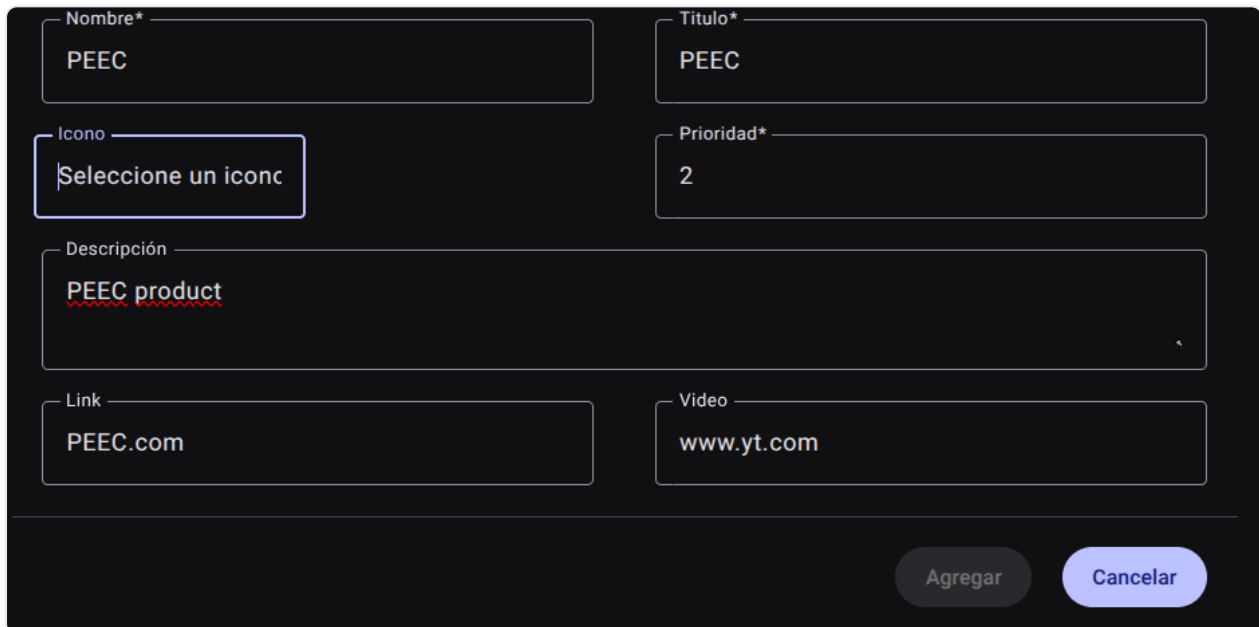
2. Register a New Digital Product

1. Click the **"Add Product"** button.



2. Fill in the required information on the side panel:

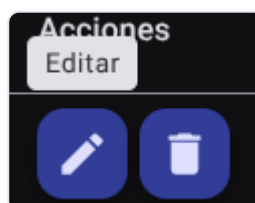
- **Name:** Commercial name of the digital product (e.g. Labcare Cloud, My Process, PEEC).
- **Title:** Slogan or main value proposition of the product.
- **Icon:** Icon identifier for the Material Icons library.
- **Description:** Detailed descriptive text with the modules and scope of the product.
- **URL:** Link to the specific page or product login (optional).
- **Video:** Promotional or tutorial video URL (optional).
- **Priority:** Integer number that defines the positioning order in the public portal.



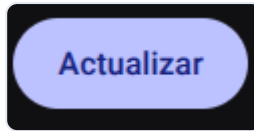
3. Click **"Add"**.

3. Edit a Product

1. Locate the product in the table and click the edit button (pencil icon ) in the actions column.

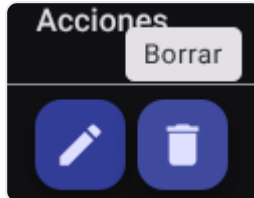


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a Product

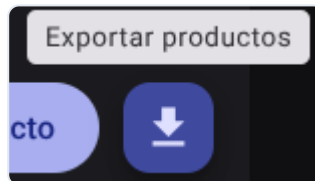
1. To delete a product, use the delete button (trash can icon ) in the actions column.



2. Confirm the action.

5. Export the Product Catalog

1. Click on the button with the download icon (**Export products**), a file in CSV format will be generated and downloaded with the complete list of registered digital products.



Required Technical Permits

- `product_read` : Allows you to consult the digital product catalog.
- `product_create` : Authorizes the registration of new products on the platform.
- `product_update` : Enables updating product data, links, videos and icons.
- `product_delete` : Allows you to remove products from the public catalog.
- `product_export` : Allows downloading of the massive product report.

Catalog of Published Services (CMS)

Description, Purpose and Objective

NOTE: The **Published Services** view in the CMS is the module where the offer of technological, professional or consulting services displayed on the platform's public portal is managed.

A **Published Service** includes the name of the service, descriptive title, representative icon (Material Icons), detailed description of the scope, explanatory web link, URL of the demonstration video and order of visual priority.

The objective of this module is to offer a configurable digital showcase of the solutions and services offered by the organization to its clients and users.

Context of Use

This module is used by:

- **Product and Marketing Managers:** To publish new services, update commercial descriptions or link demo videos and explanatory resources.
- **System Administrators:** To order or disable services according to the current commercial strategy.

Possible Actions

1. Consult the Service Catalog

1. In the service management table, see the columns: Name, Title, Icon, Description, URL, Video, Priority, Registration Date and Actions.
2. Filter using the "**Search**" text box by service name, title, or key terms.
3. Sort the rows by priority level or registration date.

CMS > Servicios

Buscar

Agregar servicio

Nombre	Título	Icono	Descripción	URL	Video	Prioridad	Fecha de registro	Acciones
No se encontraron registros								

Items por página

20

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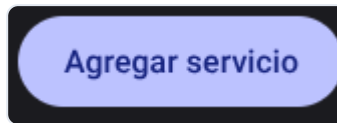
<

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>|

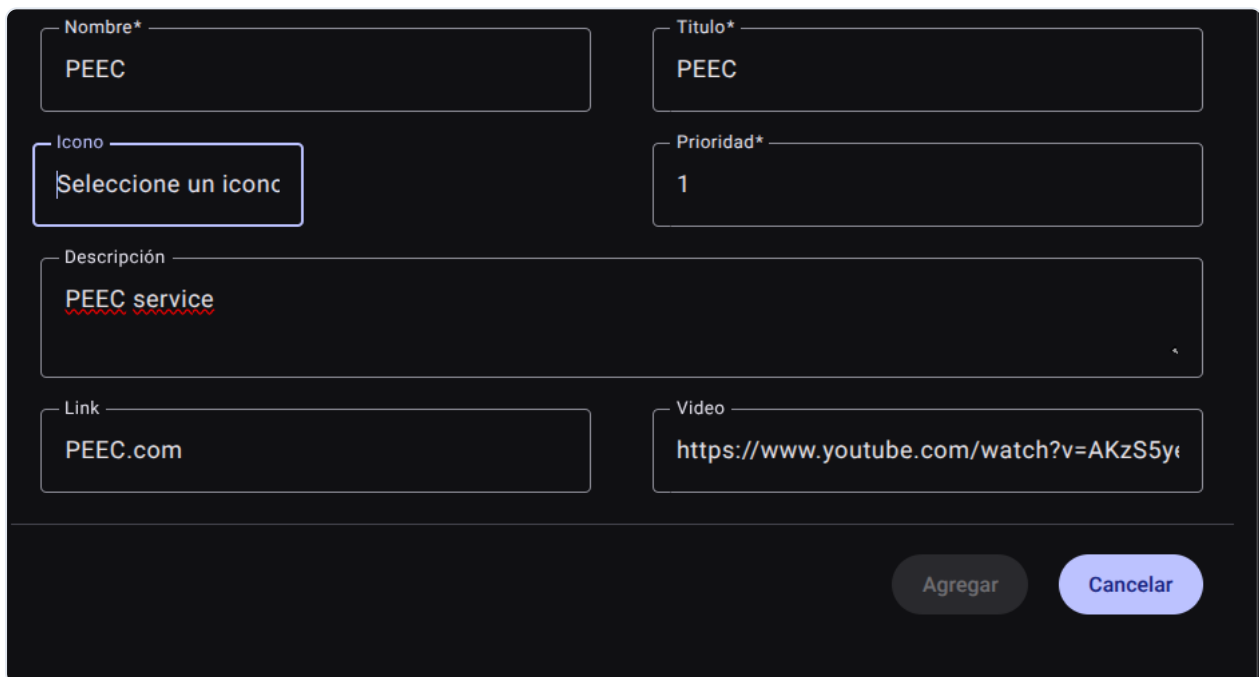
2. Register a New Service

1. Click the **"Add Service"** button.



2. In the drop-down side panel, fill out the form fields:

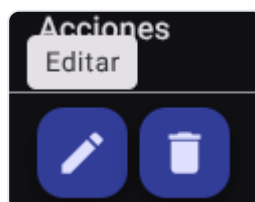
- **Name:** Service identifier name.
- **Title:** Slogan or short heading of the service.
- **Icon:** Name of the Material Icons icon for the cover.
- **Description:** Explanatory detail of the value proposition of the service.
- **URL:** Link to the detailed or service contracting page (optional).
- **Video:** Explanatory video URL (YouTube/Vimeo) (optional).
- **Priority:** Number assigned to order the appearance on the public front page.



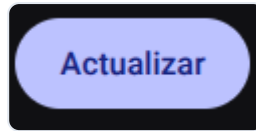
3. Save the changes using the **"Add"** button.

3. Edit a Service

1. Locate the service in the table and click the edit button (pencil icon ) in the actions column.

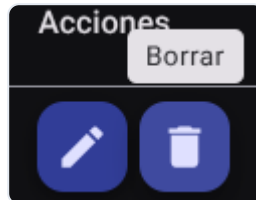


2. Modify the desired fields and save the changes with the **Actualizar** (Update) button.



4. Delete a Service

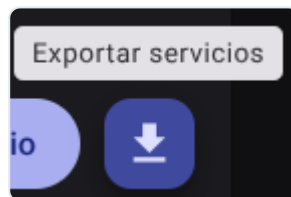
1. To delete a service, use the delete button (trash can icon ) in the actions column.



2. Confirm the action.

5. Export the Service Catalog

1. Click on the button with the download icon (**Exportar servicios**), a CSV file will be generated and downloaded with the complete list of registered services.



Required Technical Permits

- `services_read` : Allows you to consult the catalog of published services.
- `services_create` : Authorizes the registration of new services in the portal.
- `services_update` : Enables editing of names, descriptions, icons, videos and priorities.
- `services_delete` : Allows you to remove services from the official catalog.
- `services_export` : Authorizes the download of the service report in CSV.

Setting Custom System Attributes

Description, Purpose and Objective

NOTE: The **Custom System Attributes** view is the advanced management console designed to structure, customize and manage the general dynamic attributes and configuration parameters (**config**) assigned to each product in the system.

The purpose of this module is to allow administrators to make the platform forms more flexible, allowing metadata and global variables to be added without altering the source code of the application. Its objective is to enable each product (such as LABCARE_CLOUD, PEEC or QUATTROL) to inherit dynamic behaviors, custom validations and specific controls adapted to the operational needs of the organization.

Context of Use

This panel is operated in the system control routine by:

- **Product and Platform Support Administrators:** To add control fields to standard modules (e.g. add mandatory attributes in the registration of users or organizations) and define global variables for the behavior of the tools.
- **System Coordinators:** To audit the data types assigned to each menu, configure initial licensing defaults, and disable obsolete legacy structures.

Possible actions

Follow the operation procedures to manage the system parameter grid:

1. Query and Display of Attributes by Product

To examine custom properties for applications:

1. **Filter by Product:** Locate the top search bar **Search by product...** and enter the name of the product of interest to isolate its records in the table.
2. **Table structure:** The main grid organizes the information into three control columns:
 - **Product:** Displays the technical identifier name of the application (e.g. *LABCARE_CLOUD*, *PEEC*, *QUATTROL*).
 - **Menus and Attributes:** Displays the menu folders hierarchically (e.g. *organizations*, *users*) detailing the field identifier, visual label and the assigned data type (*boolean*, *Array*, etc.).

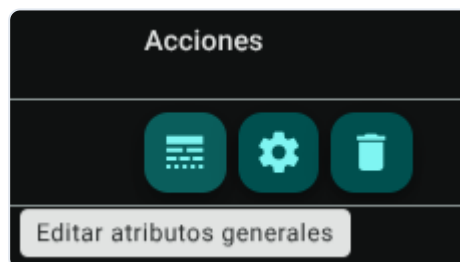
- **Settings:** Presents the global behavior parameters defined under the

Producto	Menús y Atributos	Configuraciones	Acciones
LABCARE_CLOUD	Sin atributos	Sin configurar	[List Icon] [Settings Icon] [Trash Icon]
PEEC	organizations Tiene PEEC? Tiene Químicos? PEEC IDS boolean boolean Array<string>	Orientación del formulario enum Cálculo SD de Grupo. Por usando SDPA boolean Color alertamiento color Cálculo de sesgo solo con media de PG boolean Cálculo de sesgo relativo usando RM/DEV boolean Mostrar gráficas en 2 columnas boolean Homologación múltiple boolean Color normal color Comparación por lote reactivo boolean Color peligro color Excluir resultados rechazados del cálculo de estadísticas boolean	[List Icon] [Settings Icon] [Trash Icon]

2. Edit General Attributes (Table/Menu Icon)

Allows you to modify the structure of custom fields that are injected into the product forms:

1. In the row of the desired product, locate the **Actions** column and click on the **Edit general attributes** table/menu icon.



2. The system will display the **Edit general attributes — [Product Name]** side panel. Configure the following sections:
 - **Menu Identifier:** Define or modify the technical name of the application menu (e.g. *organizations*, *users*).
 - **Menu attributes:** For each parameter in the list, set:
 - **Attribute ID:** Unique technical identifier of the field.
 - **Name:** Text label visible to the user.
 - **Type:** Type of form input (e.g. *boolean*, *text*, *number*, *select*).
 - **Position:** Numerical display order.
 - **Mandatory:** Check box to mark the mandatory completion.
 - **Add Attribute to Menu:** Click on this option to add a new attribute row within the selected menu block.
 - **Add Menu:** Press the button at the bottom of the panel if you require to create an additional menu folder.

Editar atributos generales — PEEC

El menú `config` se edita por separado.

Menús:

Menú: organizations



Menú: users



+ Agregar Menú

Guardar Cambios

Cancelar

Menú: organizations



Identificador del Menú*

organizations



Atributo: Tiene PEEC?



ID Atributo*

has_peec

Nombre*

Tiene PEEC?

Tipo*

boolean

Posición

Escribe para filtrar



Obligatorio

Atributo: Tiene Quattrol365?



ID Atributo*

has_quattrol

Nombre*

Tiene Quattrol365?

Tipo*

Menú: users

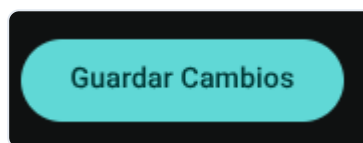
Identificador del Menú*

users

+ Agregar Atributo al Menú

+ Agregar Menú

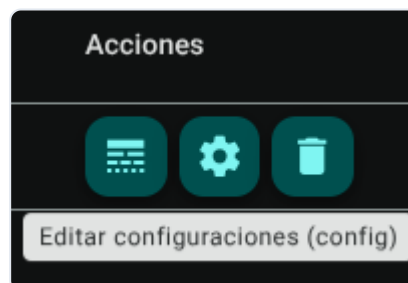
3. Once the parameters are completed, click the **Save Changes** button to apply and consolidate the product forms.



3. Edit Config Settings (Gear Icon)

To parameterize system behavior variables and product default values:

1. In the corresponding product row, go to the **Actions** column and click the **Edit settings (config)** gear icon.



2. The **Edit configurations (config) — [Product Name]** side panel will be displayed:
 - Configure or edit the fields corresponding to each global variable (*Identifier, Name, Type, Position, Required*).
 - **Default Value:** Assign in the interactive cell the data with which the parameter will be initialized for the new organizations created.
 - **+ Add Attribute:** Press this button if you require to register an additional global configuration variable for the product.

Atributos del menú config:

Atributo: Orientación del formulario



Identificador*

form_orientation

Nombre*

Orientación del formulario

Tipo*

enum

Escribe para filtrar

Posición

Opcional (menor número = primero)



Obligatorio

Valor por defecto (Este campo define el valor inicial):

Orientación del formulario*

Atributo: Cálculo SD de Grupo Par usando SDPA



Identificador*

SDPA

Nombre*

Cálculo SD de Grupo Par usando SDPA

Tipo*

boolean

Posición

Valor por defecto (Este campo define el valor inicial):

Color peligro*

Atributo: Excluir resultados rechazados del cálculo de estadísticas

Identificador* skip_rejected_records

Nombre* Excluir resultados rechazados del cálculo de estad

Tipo* boolean

Posición

Escribe para filtrar

Opcional (menor número = primero)

☒ Obligatorio

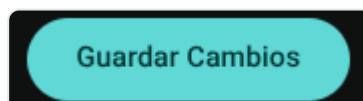
Valor por defecto (Este campo define el valor inicial):

☐ Excluir resultados rechazados del cálculo de estadísticas

+ Agregar Atributo

Guardar Cambios Cancelar

3. Click the **Save Changes** button in the footer to confirm the restructuring.



4. Delete Product / Attributes (Caneca Icon)

If you need to completely remove the customization assigned to a product from the system:

1. In the **Actions** column of the product row, click the **Delete Product** bin icon.

CAUTION: Removing attribute settings from a product is a destructive and irreversible action. It can cause display failures or loss of metadata on organizational forms already in production using these fields.



Roles and Permissions Required

Management of dynamic system attributes and global variables is restricted under the following security profiles:

The roles authorized to interact with this panel are **General System Administrator** and **IT Support**.

- **Access and Viewing:**
 - `system_custom_attributes_read` : Allows read access to the `/general/system-custom-attributes` console and display of the table.
- **Management and Writing:**
 - `system_custom_attributes_create` /
- **Elimination:**
 - `system_custom_attributes_delete` : Grants privileges to permanently delete a product's custom attributes template using the can icon.

Tag Management (Tagging)

Description, Purpose and Objective

NOTE: The **Tag Management** view is the module in charge of creating, consulting, editing, deleting and exporting visual tags for general system configuration.

A **Tag** consists of the following key attributes:

- **Name*:** Label identification text.
- **Description*:** Detail of the purpose or rule for assigning the label.
- **Color*:** Sample or chromatic tone selected using a color palette to visually highlight the badge.

The purpose of this view is to categorize and classify system logs using color visual badges.

Context of Use

This module is used by system administrators to:

- **Create visual categories:** Define color badges to label records or entities.
- **Standardize visual identifiers:** Maintain an institutional color code for quick filtering and recognition.

Possible Actions

1. View and Filter Tags

1. Use the search bar (**Search**) to locate specific tags by name or description.
2. Click on the column headers (**Name, Description, Record Date**) to sort the table in ascending or descending order.

Configuraciones Generales > Etiquetas

Buscar

Agregar etiqueta

Nombre	Descripción	Color	Fecha de registro	Acciones
etiqueta prueba	etiqueta prueba		21-08-2026	

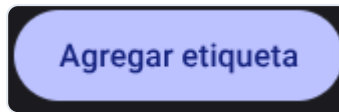
Items por pagina

10

Mostrando 1 - 1 de 1

2. Create a New Tag

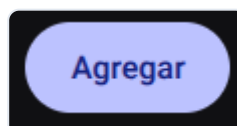
1. Click the **Add Tag** button in the upper right corner.



2. In the drop-down side panel, fill out the required fields:

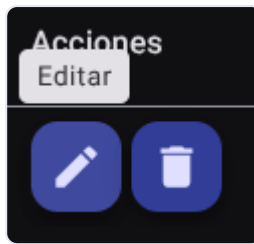
- **Name***
- **Description***
- **Color*** (Click on the bar to open the color selector/palette and define the tone).

3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new label will be incorporated into the table showing a circular indicator with the chosen color.



3. Edit an Existing Tag

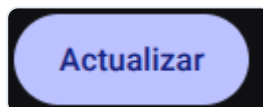
1. In the row of the desired label within the main table, locate the **Actions** column. click **pencil (Edit).



2. Open the side panel with the loaded information to modify the data or the assigned color.

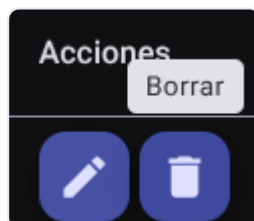
A dark blue form with three input fields. The first field is labeled 'Nombre*' and contains the text 'etiqueta prueba'. The second field is labeled 'Descripción*' and also contains 'etiqueta prueba'. The third field is labeled 'Color*' and shows a blue color bar. At the bottom right, there are two light blue buttons: 'Actualizar' and 'Cancelar'.

3. Press the **Update** button to save the changes to the system.



4. Delete a Tag

1. In the **Actions** column of the corresponding row, click **Trash Bin (Delete).

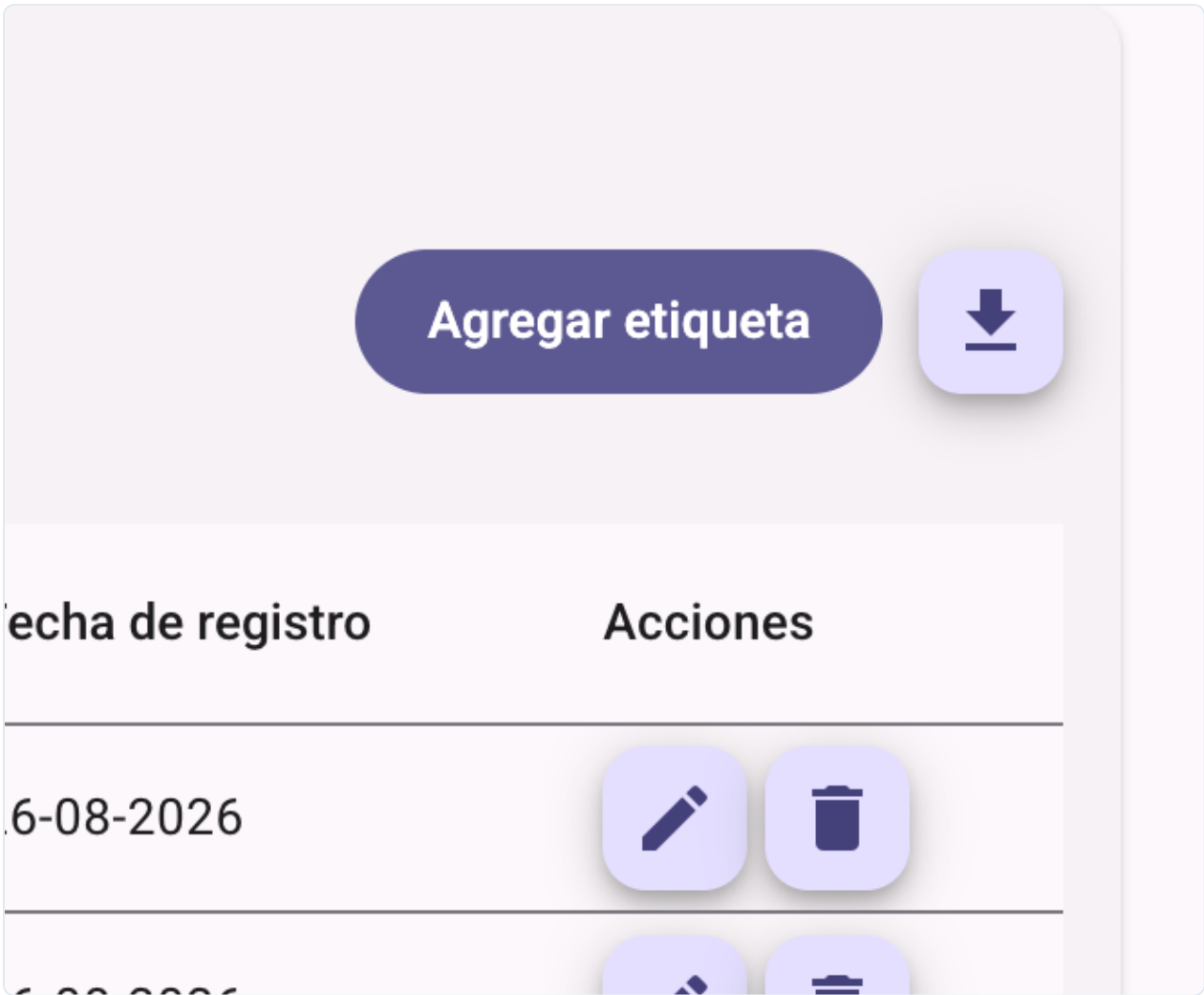


2. The system will display a direct confirmation box.

A dark blue dialog box with a white title 'Confirmación de eliminación'. Below the title is the question '¿Está seguro que desea eliminar la etiqueta etiqueta prueba?'. At the bottom right, there are two light blue buttons: 'Eliminar' and 'Cancelar'.

5. Export Tags

1. Click the blue button with download icon (**Export Tags**) located at the top right of the view.



2. The system will download the .csv file with the complete list of tags and chromatic settings.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System Languages (Internationalization)

Description, Purpose and Objective

NOTE: The **System Languages** view is the internationalization administrative console (\$) in charge of creating, consulting, editing and deleting official languages supported in the platform's user interface.

A **System Language** is made up of the following required fields:

- **Name*:** Official name of the language (e.g. *Spanish, English*).
- **Abbreviation*:** ISO language code of two or four characters (e.g. *es-es, en-us*).

The objective of this module is to allow multilingual expansion of the system by managing the official localization options of the platform.

Context of Use

This module is used by system administrators to:

- **Activate new languages:** Register official languages and their ISO codes for platform localization.
- **Edit abbreviations:** Update localization codes and translation identifiers.

Possible Actions

1. Check and Filter Languages

1. Use the search bar (**Search**) to locate specific languages by name or abbreviation.
2. Click on the column headers (**Name, Abbreviation**) to sort the table in ascending or descending order.

Configuraciones Generales > Lenguajes del Sistema

Buscar

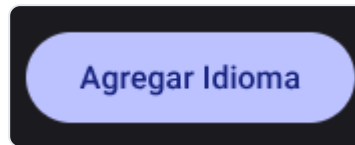
Agregar Idioma

Nombre	Abreviación	Acciones
Español de Colombia	es-co	

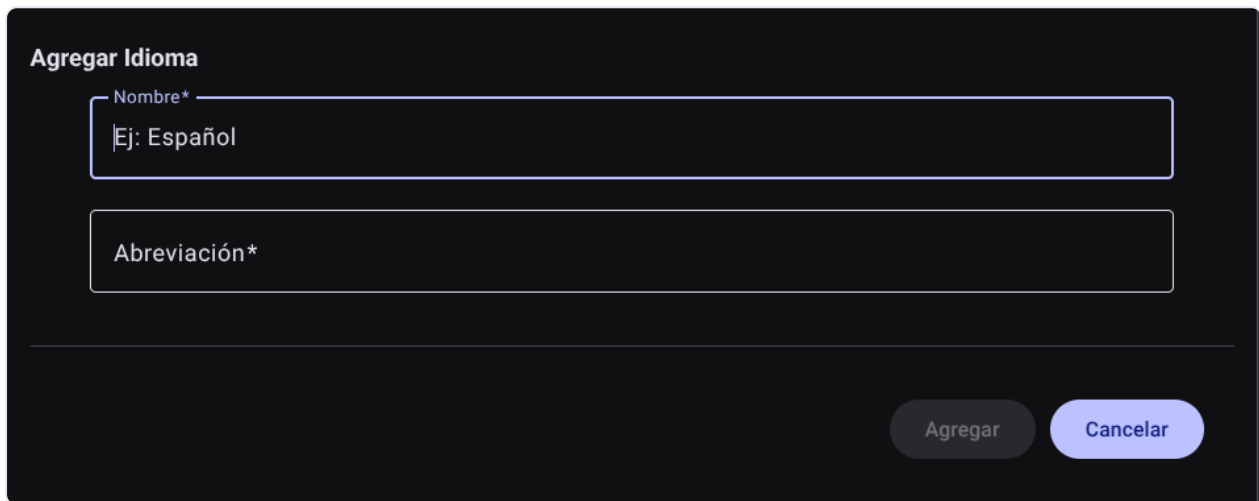
Items por página20Mostrando 1 - 1 de 1<<<>>>

2. Create a New Language

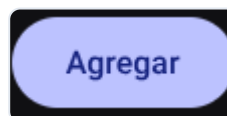
1. Click the **"Add Language"** button in the upper right corner.



2. In the drop-down side panel, fill out the required fields:
 - **Name*** (Ex: *Spanish*).
 - **Abbreviation*** (Ex: *es-es*).

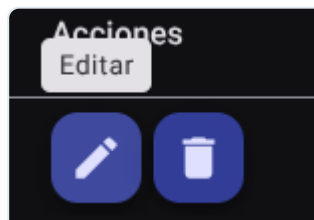


3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new language will be incorporated into the table list.

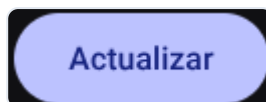


3. Edit an Existing Language

1. In the desired language row within the main table, locate the **Actions** column and click the pencil **(Edit)**.

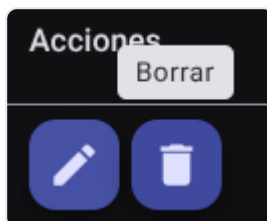


2. Open the side panel with the loaded information to modify the language name or abbreviation.
3. Press the **"Update"** button to save the changes to the system.

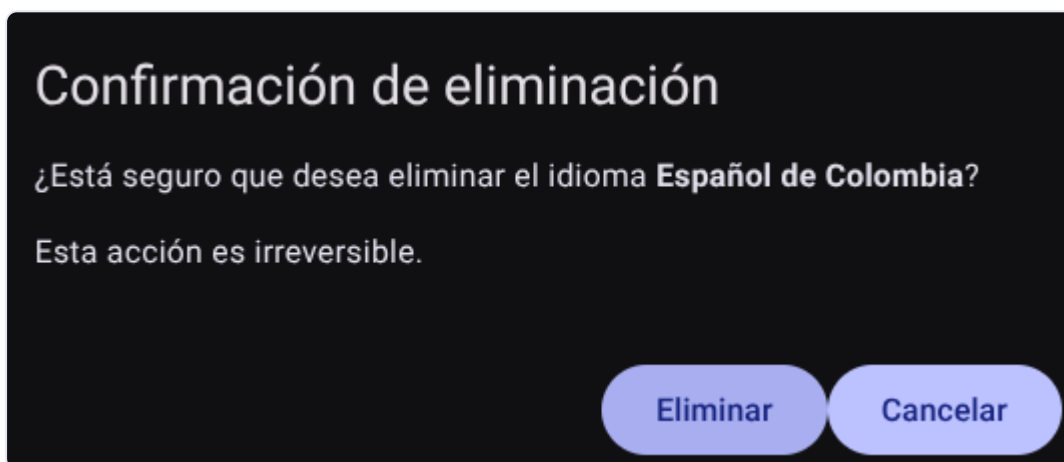


4. Delete a Language

1. In the **Actions** column of the corresponding row, click the trash bin (**Delete**).



2. The system will display a direct confirmation box



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Membership Administration

Description, Purpose and Objective

NOTE: The **Membership Management** view is the module in charge of managing the licensing and payment plans applied to the different organizations registered on the platform.

A **Membership** is a commercial subscription agreement that defines the duration of the service, trial days, cost, currency, billing period in days and the limits or products that the customer can use.

The objective of this module is to centralize the management of plans and collections, allowing administrators to create, modify, apply or remove memberships, in addition to exporting organizational billing history.

Context of Use

This module is used exclusively by global licensing administrators to:

- **Create new subscription plans:** Define standard rates (for example: Basic Plan, Pro Plan, Annual Plan) with parameterized costs and payment periods.
- **Assign licenses to clients:** Link a membership to one or more organizations to enable them access to the platform.
- **Control collections and billing:** Consult the amounts to be billed per month and export detailed reports for reconciliation with the accounting area.
- **Manage membership statuses:** Activate, deactivate or temporarily suspend organizations' access to services.

Possible Actions

1. View and List Memberships

Allows administrators to consult the catalog of memberships configured in the system, showing commercial details such as name, description, duration, trial days, whether it is public, cost per day and month, assigned products and registration date.

Configuraciones Generales > Membresías

Buscar

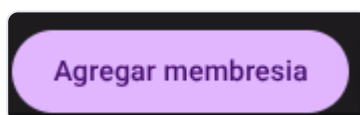
[Aplicar membresía](#)
[Remover membresía](#)
[Cambiar estado membresía](#)
[Agregar membresía](#)

Nombre	Descripción	Duración	Días de prueba	¿Es pública?	Costo general	Costo por día	Costo por mes	Periodo de pago	Productos	Fecha de registro	Acciones
Membresía Interna	Membresía Interna	Annual	900	Si	0	0	0	100	MIDNA, PEEC, QUATTROL, PQQTROL	20-06-2025	✎ 🗑 📄
Labcare Cloud Plus	Funcionalidades: Envío de datos por archivo plano. Usuarios ilimitados Envío de datos por API SSO/Google/Microsoft Copias de seguridad: Diaria retención 90 días Mensual retención 365 días	Monthly	0	Si	29900	996.6666666666666	29900	1	LABCARE_CLOUD	24-10-2025	✎ 🗑 📄
Quattrol 365 Basic	Copias de seguridad diarias por 3 días, sin comparación peer group	Monthly	0	Si	67731	2257.7	67731	3	QUATTROL	10-12-2024	✎ 🗑 📄
Quattrol 365 Pro	Copias de seguridad diarias por 90 días, transmisión por API y HL7. SSO y SAML	Monthly	0	Si	229000	7633.333333333333	229000	15	QUATTROL	10-12-2024	✎ 🗑 📄
Quattrol 365 Enterprise	Copias de seguridad diarias por 90 días, transmisión por API y HL7. SSO y SAML	Monthly	0	Si	398000	13266.666666666666	398000	30	QUATTROL	10-12-2024	✎ 🗑 📄
Labcare Cloud Standard	Funcionalidades: Envío de datos por archivo plano Máximo 5 usuarios por laboratorio. Copias de seguridad: Diaria retención 30 días Mensual retención 365 días	Monthly	0	Si	9900	330	9900	15	LABCARE_CLOUD	24-10-2025	✎ 🗑 📄
Quattrol 365 Standard (Default)	Copias de seguridad diarias por 30 días, comparación PEER Group	Monthly	0	Si	84664	2822.133333333333	84664	5	QUATTROL	10-12-2024	✎ 🗑 📄

2. Add a New Membership

To create a new plan or subscription type:

1. Click the **"Add Membership"** button at the top right of the table.



2. Fill out the required fields in the creation form:
 - **Name:** Identification name of the membership (e.g. **Plan Premium Mensual**).
 - **Duration:** Name of the plan period (e.g. **Mensual** , **Anual**).
 - **Description:** Detail of what the subscription includes.
 - **Trial days:** Number of days of free access granted before the first charge.
 - **Is it public?:** Box that defines whether clients can view and select it autonomously from their panels.
 - **Cost:** Monetary value of the plan.
 - **Currency:** Type of currency in which the payment is made (e.g. **USD** , **COP**).
 - **Payment period in days:** Exact frequency with which the payment is calculated (e.g. **30** for monthly, **365** for annual).
 - **Number of users:** Maximum number of users allowed on the plan.
 - **Product management:** You can select the products associated with the subscription and add them to the + button.

Nombre* Prueba Standard	Duración* Monthly
Descripción* Mambresia Prueba	
Días de prueba* 900	☐ ¿Es publica?
Costo* 1	
Divisa* COP	Periodo de pago en días* 30
Cantidad de Usuarios* 100	

☒ Midna
☒ PEEC
☐
☐ Quattrol 365
☐
☐
☐
☐ Labcare Cloud

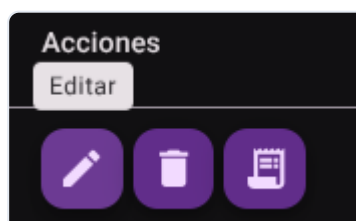
3. Click **"Add"** to register membership on the platform.



3. Edit a Membership

To update the trading terms of an existing membership:

1. Find the plan in the table and click **"Edit"** (pencil icon ).



2. Modify the corresponding fields. There are no restrictions on changing the cost, description or duration.

Nombre*
 Duración*

Descripción*

Dias de prueba*
☒ ¿Es publica?

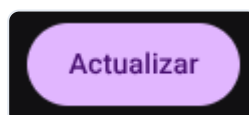
Costo*

Divisa*
 Periodo de pago en dias*

Cantidad de Usuarios*

☒ Midna
☒ PEEC
☐
☒ Quattrol 365
☐
☐
☐

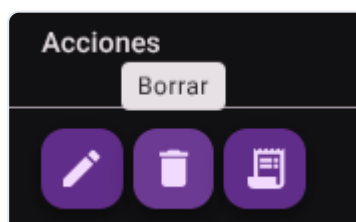
3. Click **"Update"** to apply the changes immediately.



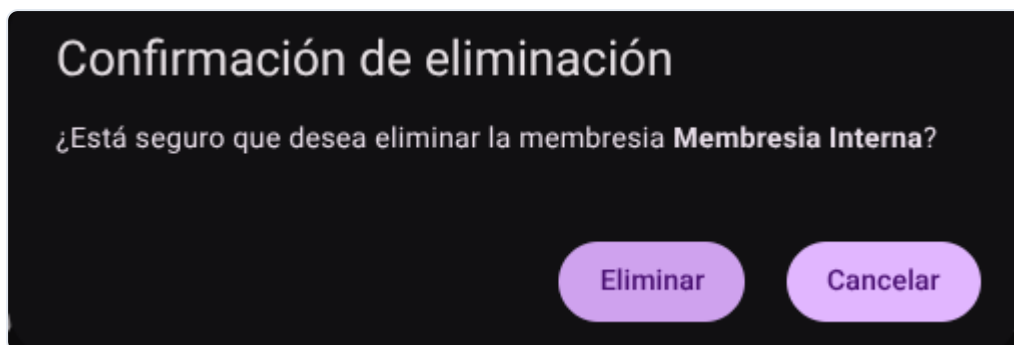
4. Delete a Membership

To definitively remove a subscription plan from the system catalog:

1. Click the trash icon () for the corresponding plan.



2. Confirm the deletion in the pop-up warning modal.

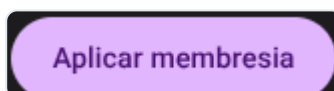


WARNING: The deletion action is irreversible and will be rejected by the system if the membership is currently assigned to any active organization on the platform.

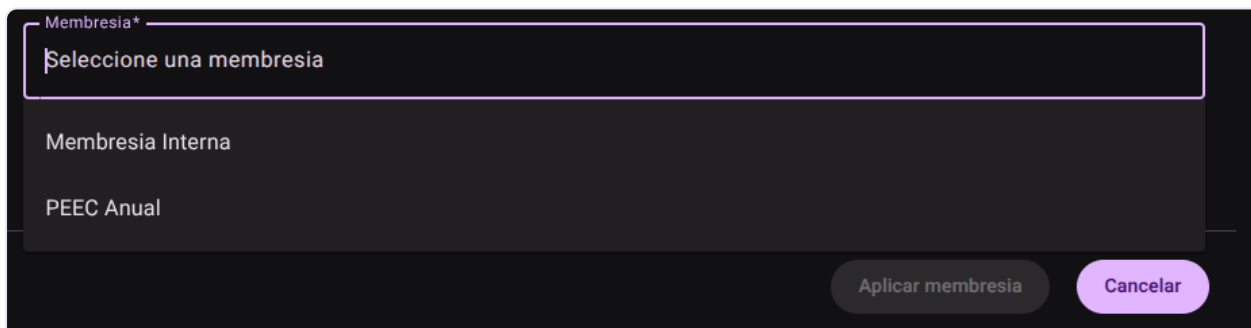
5. Apply Membership to Organizations

To associate a subscription with one or more client organizations:

1. Click the **"Apply Membership"** button at the top of the panel.

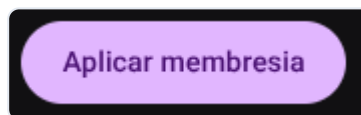


2. Select the desired membership from the drop-down list.



3. Search and select one or more recipient organizations from the list.

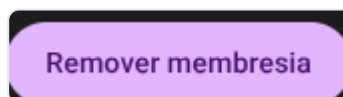
4. Click **"Apply Membership"** to grant access to the platform.



6. Remove Membership

If you want to remove access or unsubscribe from a specific organization:

1. Click the **"Remove Membership"** button.



2. Select the organization and membership plan you want to withdraw.

3. Press the **"Remove Membership"** button to unlink it.

Remover membresia

7. Change Membership Status

Enables manual subscription administrative status change for linked organizations:

1. Click "**Change membership status**".

Cambiar estado membresia

2. Select the new business status:
 - **Active:** Service fully enabled and functional.
 - **Inactive:** Access temporarily denied.
 - **Suspended:** Access paused due to non-payment or other administrative causes.
 - **Trial period (Free Trial):** Access enabled for a limited duration at no associated cost.
3. Select the organizations to which you want to apply this status change.

Estado*
Inactivo

Organizaciones

Fac Cacom 2 ✕ Laboratorio Clínico Biosare ✕ ESE Hospital San Vicente de Paul Apia ✕

Seleccione una organization

Elegir todas

☐ Renovar plazo

Aplicar estado Cancelar

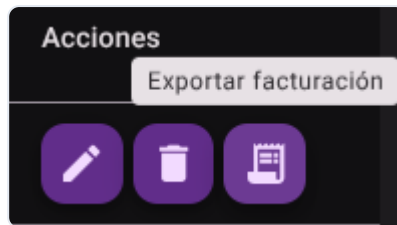
4. Press "**Apply Status**" button to apply.

Aplicar estado

8. Export Membership Billing

This function allows you to generate detailed collection reports for the accounting department:

1. Locate the plan in the table and click the "**Export Billing**" action (report/invoice icon).



2. In the pop-up window, select the specific **Month** and **Year** of the billing you want to view.

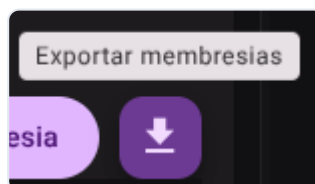
 A dark-themed pop-up window titled 'Exportar facturación Membresia Interna'. It features a text input field labeled 'Mes a registrar*' (Month to register*) containing '08/2026' and a calendar icon. At the bottom, there are two light blue buttons: 'Exportar' (Export) and 'Cancelar' (Cancel).

3. Click "**Export**" to download a file in **.CSV** format with the information on amounts and collections from the organizations in that time range.



9. Export Membership List

Allows you to download the complete database of memberships configured in the system by clicking on the general download icon in the table. The system will export a **.CSV** file structured with all the information.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .

- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System Menus and Navigation

Description, Purpose and Objective

NOTE: The **System Menus** view is the navigation architecture console in charge of configuring, creating, editing, deleting and exporting the system menu options and navigation paths associated with each product.

A **System Menu** is made up of the following key parameters:

- **Name*:** Visible name of the option in the side menu.
- **Identifier*:** Unique identification technical key or code.
- **Path*:** URL address or internal navigation path.
- **Level*:** Hierarchical level of the menu (Level 1 for main menu, Level 2 or 3 for submenus).
- **Additional Fields:** Extra configuration parameters if applicable.
- **Products*:** Mandatory selection of at least one product to which this menu will be associated.

The objective of this view is to allow the dynamic structuring of the navigation tree and to associate the access paths to the licensed products.

Context of Use

This module is used by system infrastructure administrators to:

- **Create and link navigation routes:** Create menus and associate them with authorized products.
- **Edit and structure the visual hierarchy:** Modify levels, identifiers and names of the side menu.
- **Export navigation structures:** Obtain the script file with the complete menu definition.

Possible Actions

1. Consult and Filter Menus

1. Enter text in the search bar (**Search**) to filter the menu list in real time.
2. Click on the column headers (**Name, Identifier, Path, Level, Products**) to change the table sorting.

Configuraciones Generales > Menus del Sistema

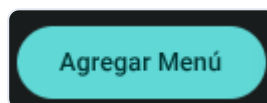
Buscar

Agregar Menú

Nombre	Identificador	Ruta	Nivel	Productos	Acciones
Actuaciones	actuacions	/legal/CPNU	4	MIPROCESO	
Agentes	agents	/cms/agents	2	MIDNA	
Alarmas	alarms	/legal/alarms	4	MIPROCESO	
Areas	matrix_types	/laboratory/matrix-type	2	QUATTROL	
Asistente de configuracion	wizard	/laboratory/wizard	4	QUATTROL	
Asistente de configuración general	setup_wizard	/laboratory/wizard	4	QUATTROL	
Asociaciones	partnerships	/cms/partnerships	3	MIDNA	
Atributos del Sistema	system_custom_attributes	/general/system-custom-attributes	1	QUATTROL, MIDNA, PEEC, PQOTROL, LABCARE_CLOUD, MIPROCESO	

2. Create a New Menu

1. Click the ******Add Menu**" button in the upper right corner.



2. In the drop-down side panel, complete the required fields:
- **Name*** (Visible name of the option in the **Ej: Usuarios** menu).
 - **Identifier*** (Key or technical identification code **Ej: users**).
 - **Path*** (URL address or internal navigation path **Ej:/general/users**).
 - **Level*** (Hierarchical level of the menu).
 - **Additional Fields** (Extra configuration parameters, if applicable).
 - **Products*** (select the box for at least one product to which this menu will be associated).
- The form requires mandatory selection of at least one product before allowing registration.

Agregar Menú

Nombre*

Ej: Usuarios

Identificador*

Ruta*

Nivel*

Campos Adicionales

Productos:

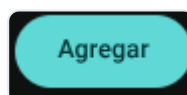
☐ PEEC
 ☐ Quattrol 365
 ☐ Labcare Cloud

Debe seleccionar al menos un producto

Agregar

Cancelar

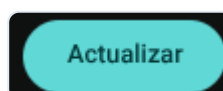
- Press the ******Add**" button to register the menu (or "**Cancel**" to close the panel without keeping changes).



3. Edit an Existing Menu

- In the desired menu row within the main table, locate the **Actions** column and click on **pencil (**Edit**).

- The **Edit Menu** side panel will be displayed; modify the linked information or products and save using the "**Update**" button.



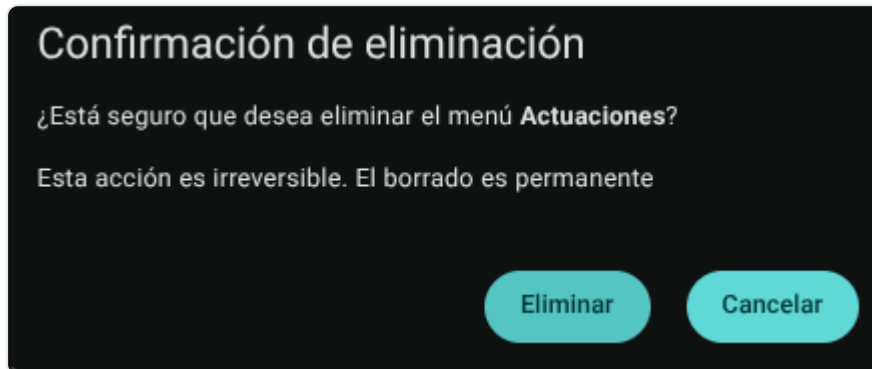
4. Delete a Menu

- In the **Actions** column of the corresponding row, click **Trash Bin (**Delete**).

```

```

2. The system will display a direct confirmation.



5. Export Menu for Script

1. Click the button with download icon located next to **Add Menu** in the upper right corner.



2. The system will generate and download an `.json` file with the navigation structure to integrate or execute in deployment scripts.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Organization Administration

Description, Purpose and Objective

NOTE: The **Organization Administration** view is the centralized module where the different legal or commercial entities registered in the system are configured and controlled.

An **Organization** is the independent workspace within the platform that groups and isolates users, roles, custom configurations and product access (completely replacing the concept of *labs*).

The objective of this view is to allow organized and hierarchical management of these entities, facilitating the creation of branches or dependencies and associating specific access rules and domains with them.

Context of Use

This module is for exclusive use by high-level administrative profiles (such as Product Administrators or Super Administrators). It is mainly used in the following scenarios:

- **Registration of new clients:** Registration of a new company that acquires the platform services.
- **Branch Management:** Modeling of the corporate structure through the relationship of a secondary organization with a **Parent Organization** (a higher-level entity in the system that centralizes and acts as a root node for dependencies or areas).
- **Organizational domain management:** Definition of the **Domain** (network identifier or email extension, for example `@empresa.co`) that the platform will use to verify the corporate identity of users and autolink them to the correct organization.
- **Purge records:** Removal of test or inactive organizations that no longer have contracted services.

Possible Actions

1. View and List Organizations

Allows administrators to examine the entire database of registered organizations. The records are presented in a table organized with the name, location, domain and hierarchical organization of each entity, whether or not it has membership and its joining date.

Configuraciones Generales > Organizaciones

Buscar 

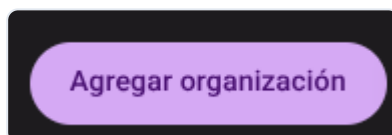
[Agregar organización](#) 

Nombre	Dirección	Ciudad	Dominio	Organización principal	Tiene membresía?	Fecha de registro	Acciones
ESE Hospital San Vicente de Paul Apia	Cra 7 No. 7 - 13	Apia Risaralda			No	07-09-2024	 
Fac Cacom 2	Km 12 Via Puerto Lopez	Villavicencio			No	07-09-2024	 
Laboratorio Clínico Biosare	Cll. 23 No. 22 - 2	Saravena Arauca			No	07-09-2024	 
Angel Diagnostica Costa	CARRERA 49B #79-99	Barranquilla			No	07-09-2024	 
Oncologos de Occidente	Calle 92 No. 29 - 75	Manizales			No	07-09-2024	 
JUNICAL MEDICAL SAS	Carrera 6 A 20-115	Girardot			No	07-09-2024	 
Laboratorio Soluciones Diagnosticas del Rio	CL 27 8-46	Monteria			No	25-06-2025	 
Alife Health SAS	Cra 47a # 95-34	Bogota			No	07-09-2024	 
Unidad Medico Quirurgica y Odontologica Santa Carolina	Cr 4 13 142	Tocancipá	Unidad Medico Quirurgica y Odontologica Santa Carolina.on.zym365.com		No	21-02-2025	 

2. Add a New Organization

To add a new entity to the system:

1. Click the **"Add Organization"** button located in the upper right corner of the panel.



2. Accurately complete the following requested fields on the side form:
 - **Name:** Enter the legal or business name by which the entity will be identified in all reports and configurations.
 - **Location (Location Data):** Indicate the address, city and country of the physical headquarters for billing and location reporting purposes.
 - **Domain:** Specify the unique domain (for example, `miempresa.com`). This allows any user who signs up with an email from that domain to be automatically associated with this workspace.
 - **Parent Organization (Optional):** If the entity to be created is a division, external department or branch, select it from the drop-down list. If you are a parent or root entity, leave this field empty.

Nombre*
Prueba Organización

Dirección*
Cl 1

Ciudad*
Bogotá

Dominio
X

Organizacion principal
prueba grupos

☐ Tiene PEEC?

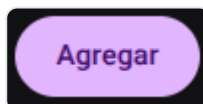
☐ Tiene Quattrol365?

PEEC IDS

+

Agregar Cancelar

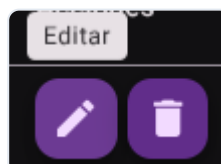
3. Press the **"Add"** button to save the record.



3. Edit an Organization

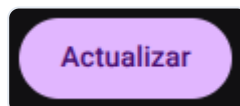
If you need to update pre-existing information of any entity:

1. Locate the organization in the table and click the **"Edit"** action (represented by the pencil icon ).



2. The form will be pre-filled with the current information.

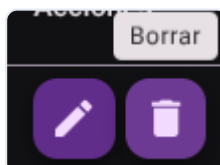
3. Make any necessary changes to the name, location, domain, or mapping of your parent hierarchical organization. There are no technical restrictions for updating these fields.
4. Click **"Update"** to apply the changes to the database.



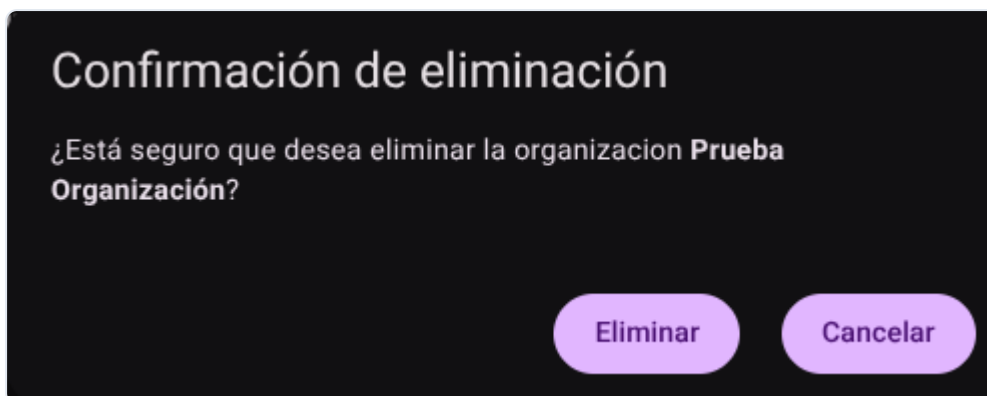
4. Delete an Organization

To permanently remove an entity from the platform:

1. Find the organization and click the **"Delete"** button (trash icon 🗑).



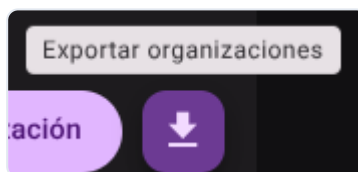
2. A confirmation modal will open warning that the action is irreversible and will affect the related data.



CAUTION: To ensure the referential integrity of the data, the system will block deletion if the organization is in use by another view or module.

5. Export Organizations

Allows administrators to generate an export file (typically in structured format) that compiles all registered organizations with their respective domains and locations for corporate audits or backups.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Country and State Settings (Geographic Location)

Description, Purpose and Objective

NOTE: The **Country and State Configuration** view is the module in charge of parameterizing the territorial division and geographic location of the headquarters, organizations, employees and clients within the platform.

The parameterization of **Geographic Location** manages two territorial levels:

- **Countries:** Name of the country and its ISO standard code (e.g. *Colombia / COL*, *Mexico / MEX*).
- **States / Departments / Provinces:** Territorial subdivision associated with a registered country.

The objective of this view is to standardize the geographical classification of entities in the database, guaranteeing the consistency of addresses in reporting and billing.

Context of Use

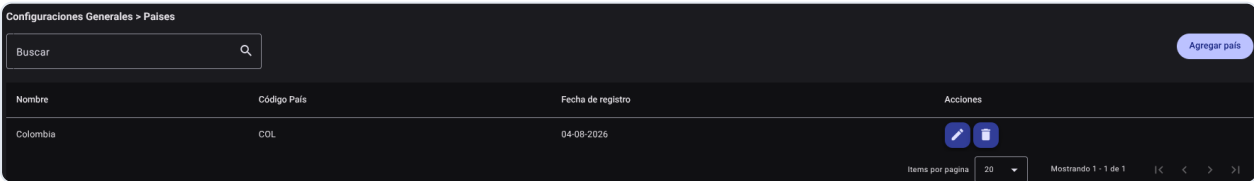
This module is used by system administrators to:

- **Open new regions:** Register countries or departments in which the organization begins operations.
- **Standardize address forms:** Ensure that location selectors in headquarters and customer records display an official geographic list.

Possible Actions

1. Register and Manage Countries

1. Enter the **Countries** view (`/erp/countries`).

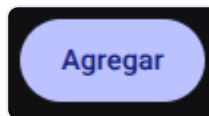


2. In the main table, consult the list of registered countries with their codes.
3. To register a new country, click **"Add Country"** and enter the Official Name and Code.

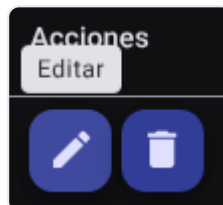


A dark-themed form for adding a country. At the top, there is a blue button labeled "Agregar país". Below it, the form has two input fields: "Nombre*" with a placeholder "Ingrese el nombre" and "Código País*". At the bottom right of the form, there are two buttons: a grey "Agregar" button and a blue "Cancelar" button.

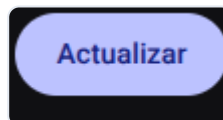
4. To add the country you must click the ****Add**** button



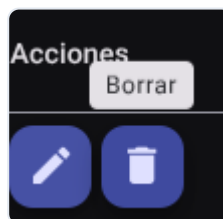
4. To modify an existing record, use the edit button (pencil icon).



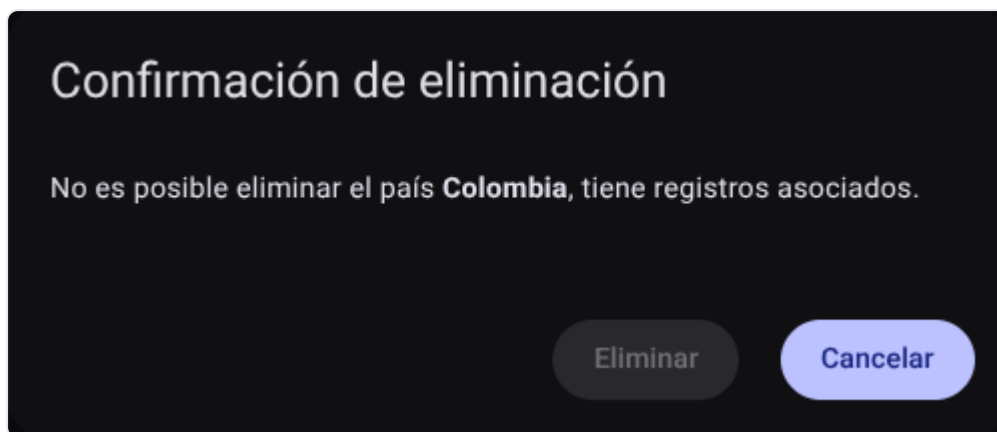
5. To save, click on the **Update** button at the bottom.



6. To Delete an existing record, use the delete button (trash icon).



7. The system will display a direct confirmation box.



CAUTION: The system blocks the deletion of any country that is being used or that has associated records.

2. Register and Manage States / Departments

1. Enter the **States** view (`/erp/states`).
2. In the main table, consult the list of **states** registered with their codes.

Configuraciones Generales > Estados

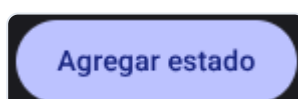
Buscar 

Agregar estado

Nombre	Código	País	Fecha de registro	Acciones
Bogotá D.C.	BOG	Colombia	04-08-2026	 

Items por página: 20  Mostrando 1 - 1 de 1 |< < > >|

3. To register a new **state**, click on "**Add state**" and enter the Name, Official Code, Country and cities (to do this, press the Enter or Comma (,) keys to add, they will be placed in a small box and if removal is required, click the (x) in the same box.



Nombre*

Código*

País

Ciudades (Presiona Enter o Coma para agregar)

Agregar

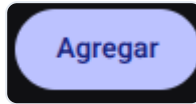
Cancelar

Ciudades (Presiona Enter o Coma para agregar)

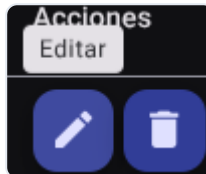
Bogotá ✕

Nueva ciudad...

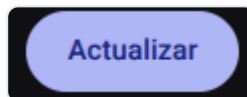
4. To add the **state** you must click the "**Add**" button.



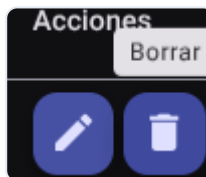
5. To modify an existing record, use the edit button (pencil icon).



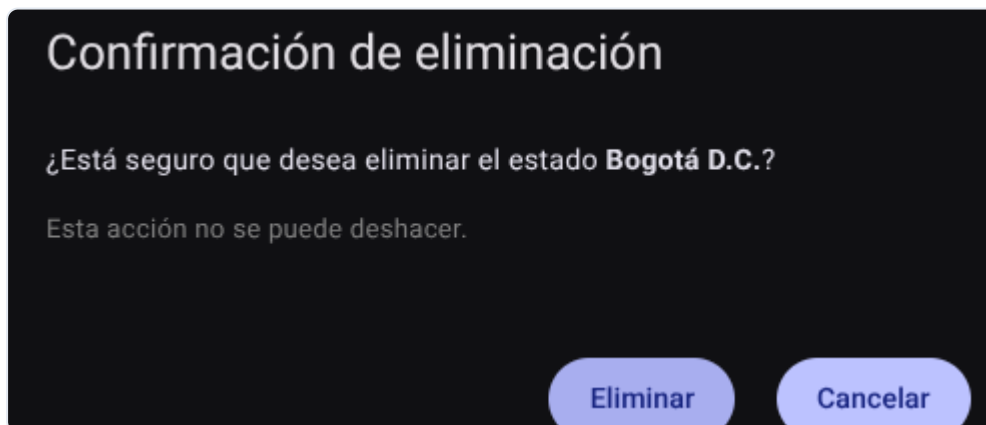
6. To save your changes, click the "**Refresh**" button at the bottom.



7. To delete an existing record, use the delete button (trash icon).



8. The system will display a direct confirmation box.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System Products and Licensing

Description, Purpose and Objective

NOTE: The **System Products** view is the administrative console in charge of the general administration of platform products and applications, allowing you to define visual themes, file limits, downtime and support access.

A **System Product** includes the following configuration parameters:

- **General Data:** Product*, Product Name* and Organization.
- **Times and Limits:** Idle time (minutes)* and General size limit (MB)* (must be greater than 5 MB).
- **Visual Themes:** Default theme* and selection of Available Themes using the add button (+).
- **Texts and Links:** Welcome message*, Logo URL, Support Link and Incident Link.
- **View Customization:** Switches (*Show tax information in profile, Show all global memberships*).

The objective of this view is to centralize the global operating parameters, technical limits and white label of the licensed applications.

Context of Use

This module is used by platform administrators to:

- **Configure new products:** Define storage limits, session times and visual identities.
- **Manage topics and support access:** Customize help links and issue hyperlinks.

Possible Actions

1. Consult and Filter Products

1. Enter terms in the search bar (**Search products**) to filter records in real time.
2. Click on the column headers (**Name, Product, Organization, Inactivity**, etc.) to sort the list in ascending or descending order.
3. The **Logo, Support** and **Issues** columns show shortcuts configured for each product.

Agregar producto

Producto*

Nombre del producto*

Organización

Tiempo de inactividad (minutos)*

Tema por defecto*

Mensaje de bienvenida*

Logo URL

Link de soporte

Link de incidencias

Límite de tamaño general (MB)*

Personalización de Vistas

☐ Mostrar información tributaria en perfil

☐ Mostrar todas las membresías globales

Temas Disponibles

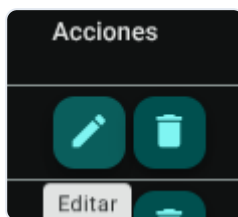
+

3. Click ******Add**" to save the settings (or "**Cancel**" to discard them without keeping changes).

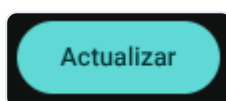
Agregar

3. Edit an Existing Product

1. In the row of the desired product within the main table, locate the **Actions** column and click on **pencil (**Edit**).

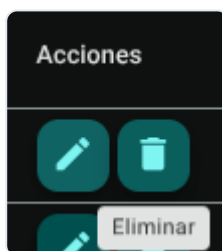


2. The panel with the loaded product information will be displayed, make the necessary adjustments and save using the "**Update**" button.

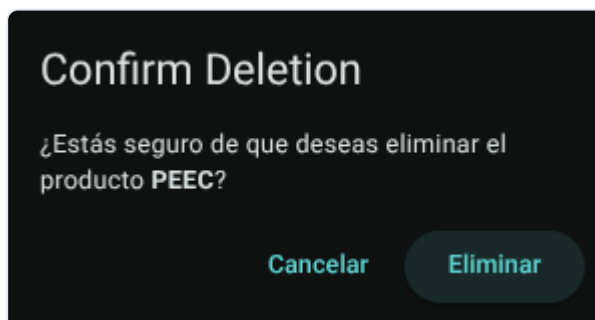


4. Delete a Product

1. In the **Actions** column of the corresponding row, click **Trash Bin (**Delete**).



2. The system will display a floating confirmation message.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .

- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System References (Key-Value Parameters)

Description, Purpose and Objective

NOTE: The **System References** view is the administrative console in charge of consulting, registering, editing and deleting global system references (URLs or database references) used in the general configuration.

A **System Reference** consists of the following key attributes:

- **Key***: Unique identifier without spaces (e.g. `API_TIMEOUT` , `STORAGE_LIMIT`).
- **Reference type**: Parameterization mode:
- **URL**: Enables the **Value or URL*** field to enter the web address.
- **DB Reference**: Enables the **Document Path*** field (must be entered in the `collection/ID` format).

The goal of this view is to allow dynamic updating of external service URLs and database pointers without the need for code deployments.

Context of Use

This module is managed by the architecture and infrastructure team to:

- **Adjust dynamic configurations:** Modify external service endpoints and integrations.
- **Link database references:** Store document paths with the `collection/ID` syntax.

Possible Actions

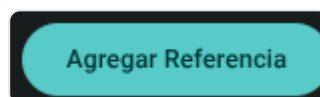
1. Consult and Filter References

1. Use the search bar (**Search**) to locate specific keys or values in real time.
2. Click on the column headers (**Key** or **Value**) to change the sorting of the list in ascending or descending order.

Clave (Key)	Valor	Acciones
customer	/customers/evAa6GTNoQBq0E4c6ou0	 
department	/departments/55uy3PSa0BW8PP90RGAh	 
membership	/memberships/AKYhyx9RypkogKWGFbxV	 
organization	/organizations/KAV3uokpJ.RQ3tJ1Q0As	 
peec_template_upload_participations	https://firebasestorage.googleapis.com/v0/b/zym365-internal-dev.appspot.com/o/template%20upload%20bulk.csv?alt=media&token=5a6517c7-4584-4c9e-a2c3-353e6c19ac2a	 
rol	/roles/WgMHLBjVooxnxwKqKKD	 
URL_PEEC_CERTIFICATION_APP_SCRIPT	https://script.google.com/macros/s/AKfycbxaAM-uS_p7u05EBMeOstgtKi-datsxIRdKh8tc_QcgaAIR0rGZdHbnS-mPBwf1g/exec	 
URL_PEEC_STATS_APP_SCRIPT	https://script.google.com/macros/s/AKfycbxt6g9wBkmpD2ue5lktVMot8ON0vbwEI7TuKXjewEflagwCJ2wBWB8p2dax386SB/exec	 
URL_POQTROL_ALGORITHM_A	https://metrology-service-594973913674.us-central1.run.app	 
URL_QUATTROL_REPORTS	https://script.google.com/macros/s/AKfycbwP0BjuyXGjan6Hku43NVRwJVZ1cpK7wgzm5m9ig3SHfMgMIX_3CT04L_WVv0BdFRaw/exec	 

2. Create a New Reference

1. Click the **Add Reference** button located in the upper right corner.



2. In the side panel that appears, complete the required fields:
 - **Key*** (enter the unique identifier without spaces).
 - **Reference type:** select the corresponding option:
 - **URL:** Enables the **Value or URL*** field to enter the link.
 - **DB Reference:** Enables the **Document Path*** field (must be entered with the *collection/ID* format).

Agregar Referencia

Clave*

Ej: URL_SERVICIO

Identificador único sin espacios

Tipo de Valor:

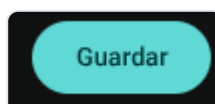
☒ URL
 ☐ Referencia BD

Valor o URL*

Guardar

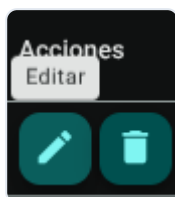
Cancelar

3. Click the **Save** button to register the reference. The form will dynamically change the input field based on the selected type.

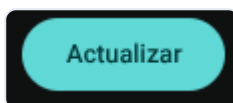


3. Edit an Existing Reference

1. In the desired reference row within the main table, locate the **Actions** column and click **pencil (Edit).

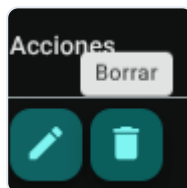


2. The **Edit Reference** panel will be displayed; Modify the key, change the mode (URL / BD) or update the route and save the changes using the **"Update"** button.

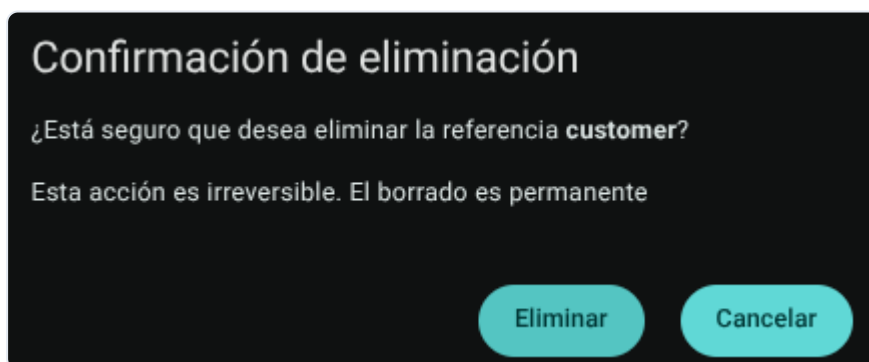


4. Delete a Reference

1. In the **Actions** column of the corresponding row, click **Trash Bin (Delete).



2. The system will display a direct confirmation box.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).

- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Role and Permission Management

Description, Purpose and Objective

NOTE: The **Roles and Permissions Management** view is the security module that allows you to define the access levels and privileges of users within the platform.

A **Role** is a profile or set of authorizations assigned to a user that defines what views they can open and what operations they can perform. Privileges are controlled by **Permissions**, which are granular technical authorizations associated with specific actions (such as reading, creating, updating, deleting, or exporting information).

The objective of this view is to ensure data security and privacy, limiting user access exclusively to your organization's tools and data that are strictly necessary for its functions.

Context of Use

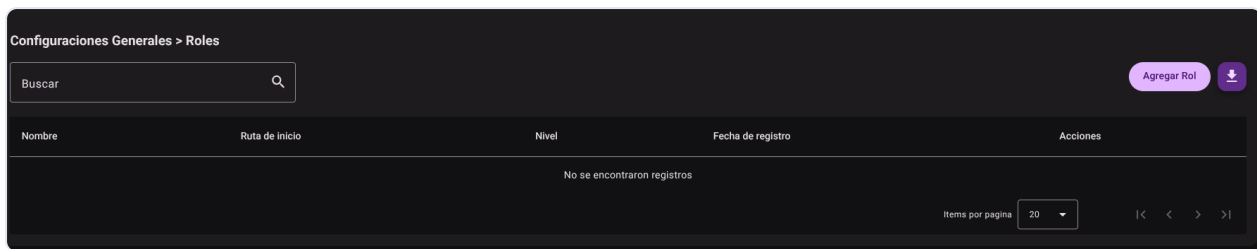
This module is used critically by Platform Administrators to:

- Configure user profiles according to the organizational structure of the company (for example: Administrator, Lawyer, Judicial Clerk, Technical Quality Manager, Auditor or Patient).
- Define the **Initial Route** (the default view to which the user is redirected immediately after successfully logging into the system).
- Configure access and editing permissions for each functional menu enabled in the organization.
- Retire or delete roles that are no longer valid or deprecated, as long as they are not assigned to active users.

Possible Actions

1. View and List Roles

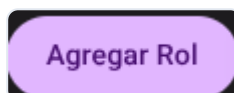
Shows the list of roles configured in the system with their essential data: the name of the role, its initial assigned path, the level and the entry date.



2. Add a New Role

To create and configure a role in the system:

1. Click the **"Add Role"** button in the upper right corner of the screen.



2. Fill out the basic fields of the form:

- **Name:** Enter the friendly name of the role (e.g. `Auditor Interno`).
- **Level:** Enter the desired level of the role. (ex. `2. Administrador del producto`)
- **Initial Path:** Enter the system path that the user will access by default (e.g. `/general/roles`).

3. Configure the **Permissions per Menu** matrix by clicking the **Add Menu** button (`+`):

- Select the functional **Menu** you want to grant access to.
- Check the boxes for the required granular permissions:
 - **Full Access:** Grants all available permissions for the selected menu.
 - **Create:** Authorizes the registration of new information.
 - **Read:** Enables display of log details.
 - **Update:** Allows you to modify or edit existing data.
 - **Delete:** Allows permanent deletion of records.
 - **List:** Enables the display of general data tables.
 - **Export:** Enables the option to download reports and data to external files.

Nombre*

Prueba Rol

Nivel*

2: Administrador de producto

Ruta inicial*

/general/roles

Permisos

Menu

☐ Acceso completo

☐ Crear
☐ Leer
☐ Actualizar
☐ Borrar
☐ Listar
☐ Exportar

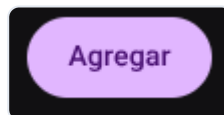
+

Roles ✕

Agregar

Cancelar

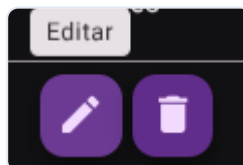
4. Click **"Add"** to save the role.



3. Edit a Role

To modify the privileges or settings of a role:

1. Locate the role in the list and click **"Edit"** (pencil icon ).



2. Modify the initial path or add/remove specific menus and permissions from the access array. There are no restrictions on changing the permissions assigned to a role.

Nombre*

Prueba Rol

Nivel*

2: Administrador de producto

Ruta inicial*

/general/roles

Permisos

Menu

☐ Acceso completo

☐ Crear
☐ Leer
☐ Actualizar
☐ Borrar
☐ Listar
☐ Exportar

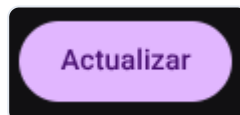
Roles

+

Actualizar

Cancelar

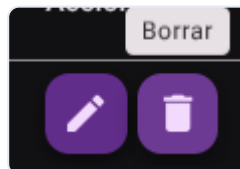
3. Click **"Update"** to apply the changes immediately.



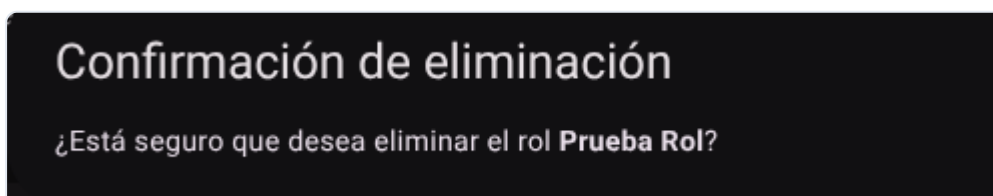
4. Delete a Role

To permanently delete a profile from the system:

1. Find the role and click the **"Delete"** action (trash icon ).



2. Confirm the action in the confirmation popup modal.



CAUTION: The system preventively blocks the deletion of any role that is being used by an active user in an organization.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

User Administration

Description, Purpose and Objective

NOTE: The **User Administration** view is the section of the platform that allows you to control the access of staff and collaborators to the system, managing their credentials, personal data and security profiles.

A **User** is any account with active credentials that logs into the system under a given role. The platform classifies accounts into three main types: **Internal User** (direct collaborator who has a supervisor and assigned office), **External User** (staff or indirect client) and **Patient User** (final recipient of health services with clinical metrics such as weight and height).

The objective of this module is to centralize account management, guaranteeing that each person is correctly identified and has only the access that corresponds to them.

Context of Use

This module is used by organization Administrators to:

- **Register new collaborators:** Register employees (internal users) with their respective contractual information and supervision.
- **Create accounts for clients or contractors:** Enable external users.
- **Register patients:** Register health users (patients) linked to service providers.
- **Credential support:** Change forgotten passwords or temporarily suspend access (deactivate) accounts for security or job separation reasons.

Possible Actions

1. View and List Users

Displays a table with all the users registered for the organization, detailing their name, email, role, user type (internal, external or patient) and activity status.

Configuraciones Generales > Usuarios

Buscar

Agregar usuario

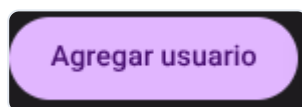
Nombre	Apellido	Tipo de usuario	Nombre de usuario	Email	Telefono interno	Acepta TyC	Cargo	Idioma	Esta activo?	Fecha de registro	Acciones
Astrid Camila	Martinez Medina	Usuario	Astrid Camila Martinez Medina	Astridcamila2009@hotmail.com	3106536534	Si	Bacteriologa	Español	No	06-05-2026	
Marcela Adriana	Deantonio Monroy	Usuario	Marcela Adriana Deantonio Monroy	alecramad77@gmail.com	3007903660	Si	Bacteriologa	Español	No	11-04-2026	
Mario	Duque	Usuario	Mario Duque	laboratoriomaduma@hotmail.com	3117196241	Si	NA	Español	Si	01-04-2024	
Kerlys	Esparragoza	Usuario	Kerlys Esparragoza	Kerlys96@hotmail.com	3006345078	Si	Bacteriologa	Español	No	11-03-2025	
Dinamica	Clinica de la Mujer	Usuario	Dinamica Clinica de la Mujer		+573161234567	No	Usuario	Español	Si	01-01-2022	
DINAMICA SEDE URGENCIAS	SURA	Usuario	DINAMICA SEDE URGENCIAS SURA	miledepe@dinamicaips.com.co	+573161234567	No	Usuario	Español	Si	01-01-2022	
Adriana	Guerra Martinez	Usuario	Adriana Guerra Martinez	adguemar@hotmail.com	3135353342	Si	Bacteriologa	Español	No	14-11-2025	
Nancy Patricia	Martinez Barrera	Usuario	Nancy Patricia Martinez Barrera	nanpamaba@yahoo.es	3112372396	Si	NA	Español	Si	08-03-2024	
Diana	Quiñones Bacareo	Usuario	Diana Quiñones Bacareo	info@dqlaboratorio.com	3157280125	Si	NA	Español	Si	08-03-2024	

2. Add a New User

To create an account, click the add button corresponding to the required user type:

Add User

1. Click "Add User".



2. Fill out the form with the basic information:

- **Personal Information:** Name, surname, email, telephone, address, neighborhood, city, country and preferred language.
- **Identification:** Type, number and date of issue of the document, and date of birth.
- **Security:** Status, position and assignment of the corresponding **Role**.

Configuraciones Generales > Usuarios

Buscar

Nombre	Apellido	Tipo de usuario	Nombre de usuario	Email
Astrid Camila	Martinez Medina	Usuario	Astrid Camila Martinez Medina	Astridcamila2009@hotmail.com
Marcela Adriana	Deantonio Monroy	Usuario	Marcela Adriana Deantonio Monroy	alecramad77@gmail.com
Mario	Duque	Usuario	Mario Duque	laboratoriomaduma@hotmail.com
Kerlys	Esparragoza	Usuario	Kerlys Esparragoza	Kerlys96@hotmail.com
Dinamica	Clinica de la Mujer	Usuario	Dinamica Clinica de la Mujer	
DINAMICA SEDE URGENCIAS	SURA	Usuario	DINAMICA SEDE URGENCIAS SURA	miledepe@dinamicaips.com.co
Adriana	Guerra Martinez	Usuario	Adriana Guerra Martinez	adguemar@hotmail.com
Nancy Patricia	Martinez Barrera	Usuario	Nancy Patricia Martinez Barrera	nanpamaba@yahoo.es
Diana	Quiñones Bacareo	Usuario	Diana Quiñones Bacareo	info@dqlaboratorio.com

Nombre*

Santiago

Apellido*

Casallas

Email*

santiago.casallas@zymdev.com

Telefono*

3054070606

Cargo*

Administrative Assistant

Idioma*

Español

Dirección de residencia

el 1

Barrio

Ciudad

Bogotá

Estado

Pais

Tipo de documento de identidad

CC

Numero de documento de identidad

1234567890

Fecha de expedición del documento de identidad

Fecha de nacimiento

Organizaciones y roles

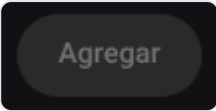
Organizacion

Oncólogos de Occidente

Rol principal

PEEC Química Clínica y Hematología

3. Click "Add" to create the account.

A dark grey button with rounded corners and the word "Agregar" in white text.

Add Internal User

1. Click **"Add internal user"**.
2. Complete the form information (includes the same external user data plus organization-specific fields):
 - **Corporate Structure:** Assigned office, direct supervisor and department to which it belongs.
 - **Travel Documentation:** Passport and date of issue of the passport.
3. Click **"Save"** to create the record.

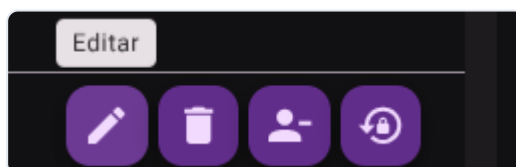
Add Patient

1. Click **"Add Patient"**.
2. Complete the form with the specific clinical and identification fields:
 - **Clinical Data:** Weight (in kilograms), height (in centimeters) and profession of the patient.
 - **Service:** Associated health service provider and corresponding role on the platform.
3. Click **"Save"** to confirm.

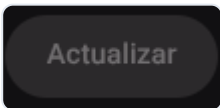
3. Edit a User

To modify the contact or work information of a registered user:

1. Locate the user in the table and click **"Edit"** (pencil icon ).



2. The form will load with the current information. Make any necessary changes to the address, title, phone number or role.
3. Click **"Update"** to save.

A dark grey button with rounded corners and the word "Actualizar" in white text.

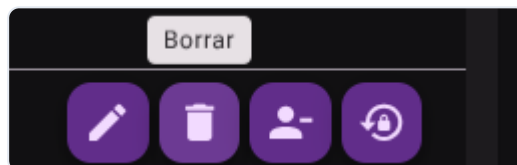
WARNING: For security and login integrity (authentication) reasons, the email address cannot be modified once the account has been created.

Nombre* prueba1203	Apellido* prueba1203
Email* prueba1203@zymdev.com	Telefono* 1235
Cargo* prueba1203	Idioma Español

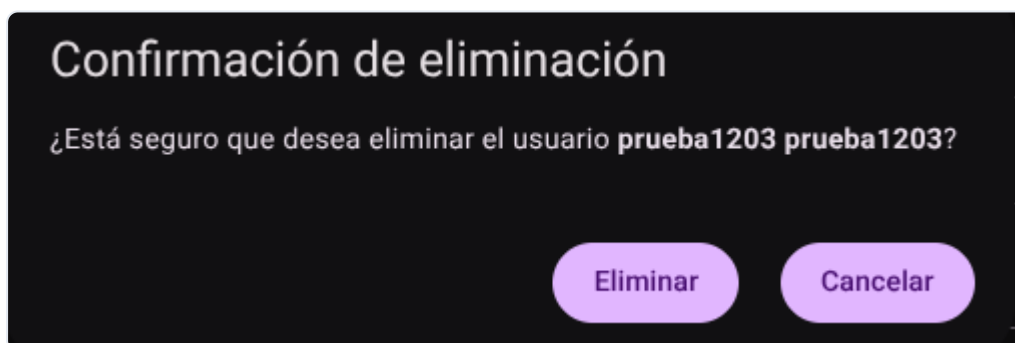
4. Delete a User

To permanently delete a user account:

1. Locate the record and click **"Delete"** (trash icon ).



2. confirm the action in the confirmation modal.



CAUTION: Deleting a user is permanent and will erase their direct connection with the organization. If the user has associated historical records (such as process uploads or results entries), it is recommended to change their status to **Inactive** instead of deleting the account to preserve data traceability.

5. Activate or Deactivate User

Allows you to quickly suspend or restore access to the platform without having to delete the user's historical data:

1. Click the status switch or icon in the corresponding user's row.



2. The system will toggle the **Are You Active?** between **Yes** (access allowed) **No** (access temporarily denied).

Esta activo?

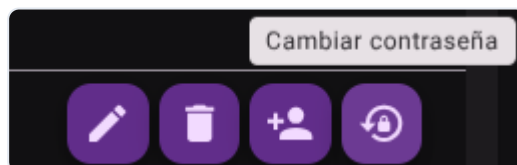
No

Si

6. Change Password from the Administrator

Allows you to safely redefine the password of a user who has forgotten their access credentials:

1. Click the key icon or "**Change Password**" in the actions column.

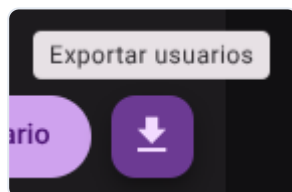


2. In the pop-up form, enter the new password and confirm it in the corresponding verification field.

3. Click **"Change Password"** to save.

7. Export User List

To download the organization's user database, click the download icon in the upper right corner. A file in **.CSV** format will automatically download with the account information.



8. Search User

To search for any user by name or other character, type the first name, last name, username, email, phone number, etc., in the search bar

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read` , `state_read` , `languages_read` and `menus_read` .
- **Entities and Licensing:** `memberships_read` , `system_products_read` and `config_refs_read` .
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).

- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Instrument and Analyzer Configuration

Description, Purpose and Objective

NOTE: The **Instrument Configuration** (or Instruments) view is the module in charge of registering, cataloging and integrating the physical analyzer equipment and diagnostic readers that operate in the organization's processing centers.

An **Instrument** on the platform represents the digital record of a real medical-analytical device. It is characterized by a personalized **Name** (alias assigned by the organization to identify the equipment, e.g. *Cobas 1 Chemistry Analyzer*) and the base **Instrument Model** selected from the system's global catalogue, which includes brand, manufacturer and communication specifications.

The objective of this view is to create the laboratory's analytical hardware inventory, allowing the Quality Control Tests to be mapped with the corresponding physical analyzers and lay the foundations for the automatic communication of results via API or HL7 protocol.

Context of Use

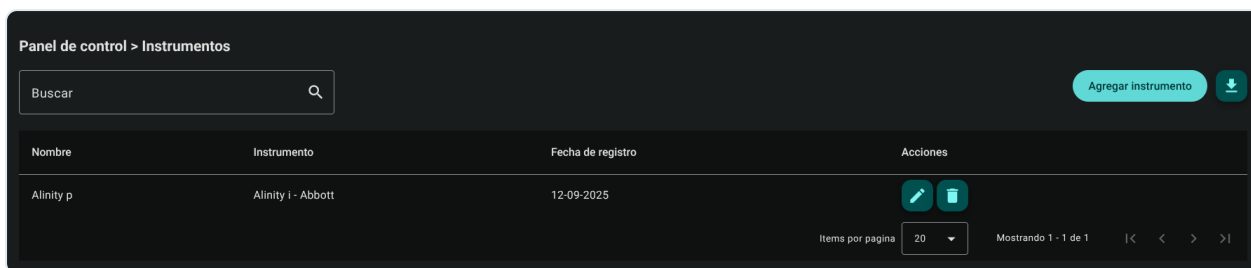
This dashboard is configured by technical directors and systems support engineers to:

- **Register new analyzers:** Add the new machines installed in the laboratory to enable the reporting of results associated with them.
- **Manage data integrations:** Uniquely identify each analyzer to configure file transmission rules and automated mapping from local computer software.
- **Analytical maintenance:** Modify the alias of the equipment in the event of physical section transfers or capacity organization.

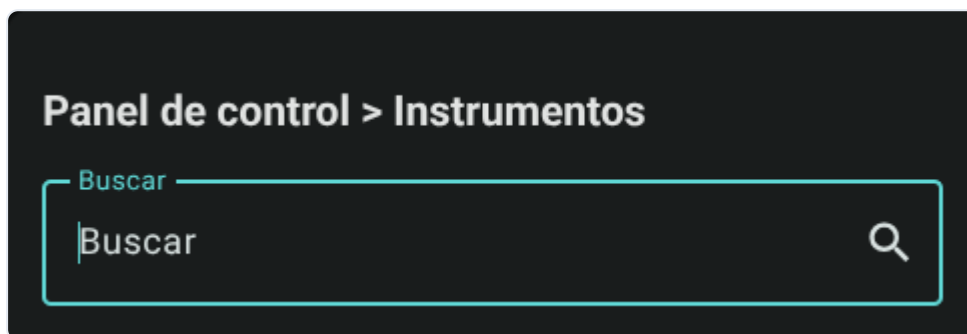
Possible Actions

1. Consult Analyzer Catalog

Shows the list of all analyzers registered in the organization, detailing: Custom name, Instrument (Model and Manufacturer) and Registration date.



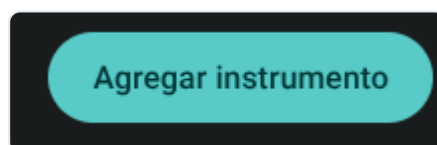
The header search engine quickly filters by equipment alias, model or machine manufacturer.



2. Add an Instrument

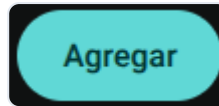
To register a physical analyzer:

1. Click **"Add Instrument"** in the panel header.



2. Complete the information requested in the side form:
 - **Name:** Assign a unique and descriptive alias to physically identify the equipment in the processing room (e.g. *Sysmex H1 Hematology*).
 - **Instrument:** Select the exact equipment model from the auto-complete drop-down list. The list shows the model and manufacturer (e.g. *XN-1000 - Sysmex*).

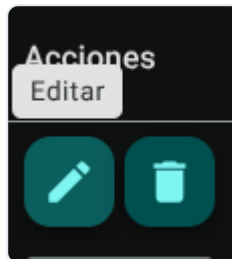
3. Press **"Add"** to register the analyzer.



3. Edit an Instrument

If you need to update the device alias or re-link the base model due to a firmware version change:

1. Click **"Edit"** (pencil icon ) in the corresponding row.

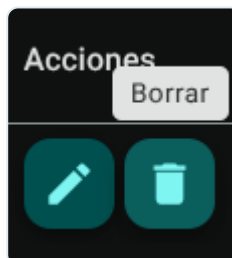


2. Correct the information on the side form and click **"Update"** to apply the changes immediately.

4. Delete an Instrument

To remove a computer from the organization database:

1. Click on the trash icon () of the desired instrument.



2. Confirm the deletion in the popup modal.

WARNING: The system will automatically restrict and block the deletion of any analyzer that already has **QC Tests** (Quality Control Tests) created or history of QC results linked. This prevents the loss of traceability of the organization's analytical data.

Confirmación de eliminación

¿Está seguro que desea eliminar el instrumento **Alinity p**?

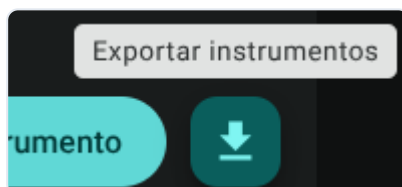
El instrumento no se puede borrar porque esta en uso.

Eliminar

Cancelar

5. Export Instrument Catalog

Click the download button in the header to download the complete inventory of instruments and analyzers in a **.CSV** format file.



Roles and Permissions Required

Access to this parameterization module is reserved for the roles of **Quality Director**, **Laboratory Coordinator** and **System Administrator**. Requires the following technical permissions:

- **Display and Audit:** `instruments_read` (allows you to consult the list, filter parameters and audit the current configurations).
- **Management and Writing:** `instruments_create` , `instruments_update` and

Control Lots and Reagent Lots

Description, Purpose and Objective

NOTE: The **Control Lots and Reagents** view is the quality control module responsible for recording, classifying and monitoring the life cycle of the control materials and reagents used in the organization's analytical processes.

The system organizes these materials into two very different types:

1. **Control Lot:** Control material or serum of known concentration used to verify that the analyzer measures correctly. It is characterized by a **Lot Number**, a **Description**, an **Expiration Date** (or expiration), the **Manufacturer** of the control and the assigned **Clinical Area**.
2. **Reagent Lot:** The chemical compound or biological reagent used to react with the sample and quantify an analyte. It is defined solely by its **Lot Number** and the **Measurand** (analyte) to which it is associated.

The objective of this view is to guarantee the traceability of critical laboratory supplies, allowing patient results to be correlated with the exact batch of reagent and control with which they were processed, detecting drifts due to material degradation.

Context of Use

This panel is operated by clinical laboratory staff and quality coordinators to:

- **Register new batches acquired:** Enter the control and reagent batches of the new shipments before starting to use them in daily processing.
- **Monitor expiration dates:** Avoid processing samples using expired controls that invalidate quality control.
- **Switch lot (Lot Switch):** Archive out-of-stock or expired lots to remove them from active listings and make way for new lots.

Possible Actions

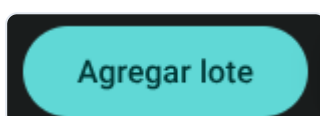
1. Consult and Search Lots

The interface organizes the batches into two interactive tabs: **Control Batch** and **Reactive Batch**. Upon entering each tab, the corresponding table is presented detailing its characteristics and status. The top search engine filters batches by number, manufacturer or clinical area instantly.



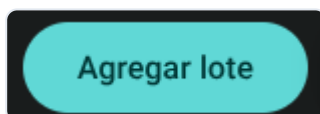
2. Add a New Batch

To register a lot on the platform, go to the corresponding tab and click on **"Add lot"**:



Add Control Lot

1. Click the **Control Batch** tab and press **"Add Batch"**.



2. Fill out the side form information:

- **Lot number:** Alphanumeric code printed by the manufacturer.
- **Description:** Detail or commercial name of the control (e.g. *Multichem Level 1 Control*).
- **Expiration Date:** Select the expiration date of the material using the calendar.
- **Area:** Processing area (autocomplete selection, e.g. *Clinical Chemistry*).
- **Manufacturer:** Manufacturer of the control material (self-completing selection, e.g. *Bio-Rad*).

Numero de lote*
Lote 1

Descripción*
Lote 1 prueba

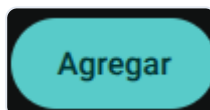
Fecha de vencimiento*
21/8/2026

Área*
Química Sérica

Fabricante*
Haier Biomedical

Agregar Cancelar

3. Press **"Add"** to save.



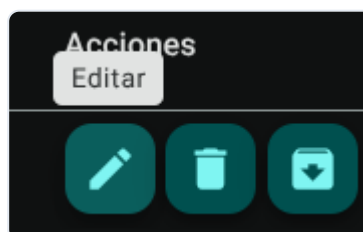
Add Reagent Lot

1. Click the **Reagent Lot** tab and press **"Add Lot"**.
2. Fill out the side form:
 - **Lot number:** Code printed on the reagent cartridge.
 - **Measuring:** Select from the autocomplete list the analyte to which the reagent corresponds (e.g. *Glucose*).
3. Click **"Add"** to save.

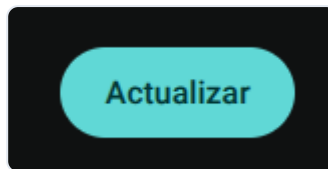
3. Edit a Batch

To modify the description, expiration date or manufacturers of a lot:

1. Click **"Edit"** (pencil icon ) in the appropriate batch row.



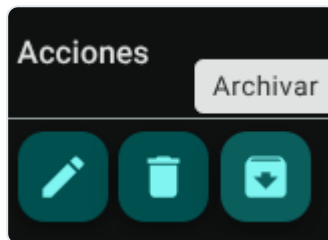
2. Modify the information in the side panel and press **"Refresh"** to apply the changes immediately.



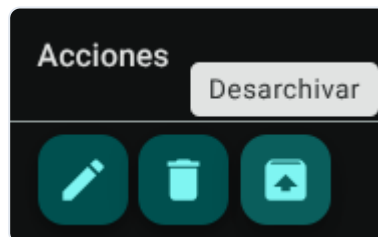
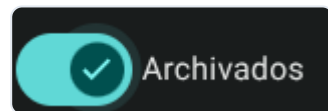
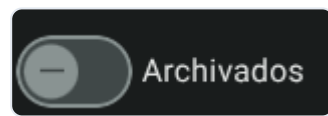
4. Archive and Unarchive Batches

When a reagent or control lot is physically depleted or expires:

- **Archive:** Click the "**Archive**" button (drawer icon ) in the batch row. It will be hidden from the main list and will no longer be displayed in data entry menus.

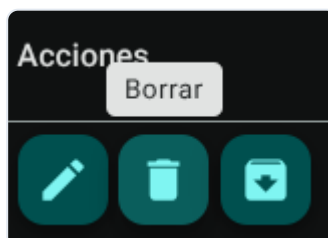


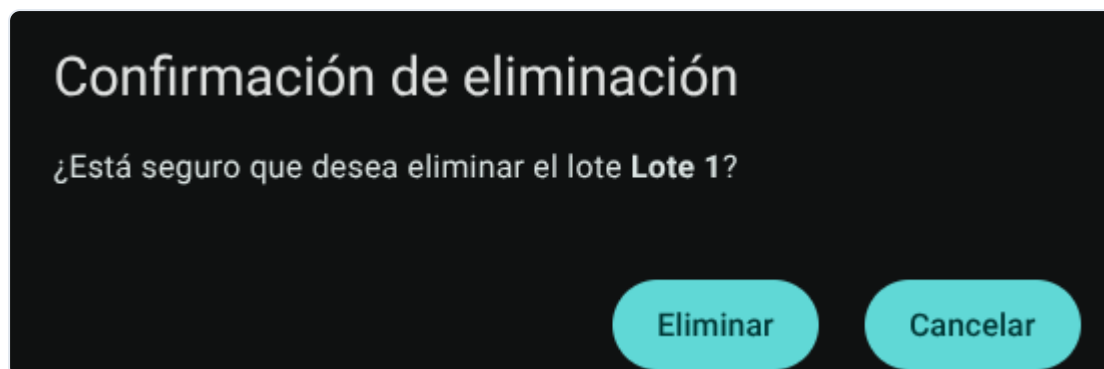
- **Restore:** Turn on the "**Archived**" switch at the top left of the table to view historical batches. Click "**Unarchive**" in the required batch row to reactivate it in the regular catalog.



5. Delete a Batch

Click on the trash icon () of the batch and confirm the action in the modal.

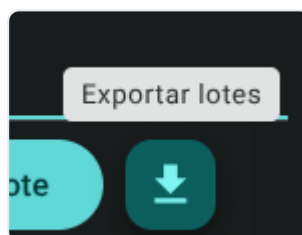




WARNING: The system will block the deletion of any lot (control or reagent) that is already being referenced in an active or historical **QC Test**. In such a scenario, the batch must be purged using the **Archive** option.

6. Export Batch Catalog

Click the download button in the header of the active tab to export the control lot or reagent inventory in **.CSV** format.



Roles and Permissions Required

Access to this parameterization module is reserved for the roles of **Quality Director**, **Laboratory Coordinator** and **System Administrator**. Requires the following technical permissions:

- **Display and Audit:** `control_lots_read` (allows you to consult the list, filter parameters and audit the current configurations).
- **Management and Writing:** `control_lots_create` , `control_lots_update` and