



SOFTWARE FACTORY

Mi Proceso

Legal management console for judicial records, court deadlines, and task tracking.

Official User Manual

zymDev Core Platform v5.5.2

Issue Date: 2026-09-13

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Legal management console for judicial records, court deadlines, and task tracking.

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Available Modules & Functionalities

Below are the modules and views available in **Mi Proceso**:

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

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
Incidents & Support	-	The Incident Management view is the centralized module for recording, reporting and tracking incidents, errors or requests for new...	Open Manual

View	Submodule	Description	Link
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

View	Submodule	Description	Link
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

Legal Management

View	Submodule	Description	Link
Alarms	-	The Alarm Control Center view is the legal module responsible for consolidating, tracking and alerting on all procedural terms, du...	Open Manual
Legal Case Tasks	-	The Process Tasks view is the central console for operational monitoring of the legal area. Its purpose is to allow lawyers, direc...	Open Manual
My Cases & Proceedings	-	The My Processes module is the central legal control console designed for the management, consultation, organization and detailed...	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.

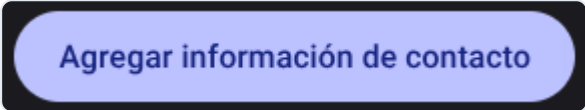
CMS > Informaciones de Contacto

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

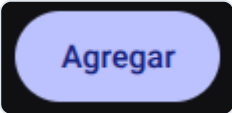
Prioridad*

1

Agregar

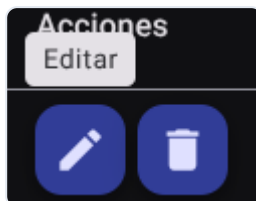
Cancelar

3. Save the record by clicking "Save".

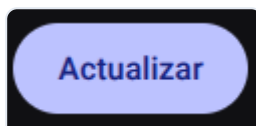


3. Edit a Contact Channel

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

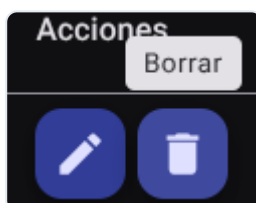


2. Modify the desired fields and save the changes to the **Save** button.

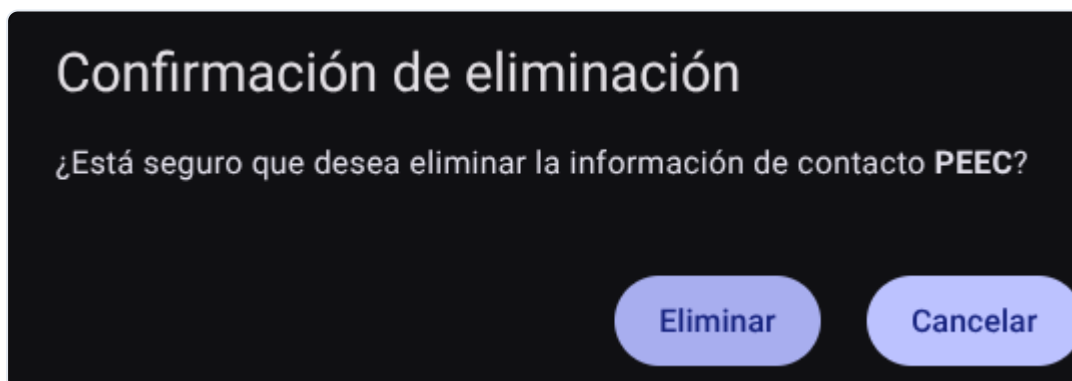


4. Delete a Contact Channel

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

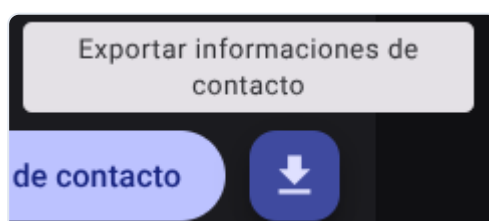


2. Confirm the action.



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.

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:

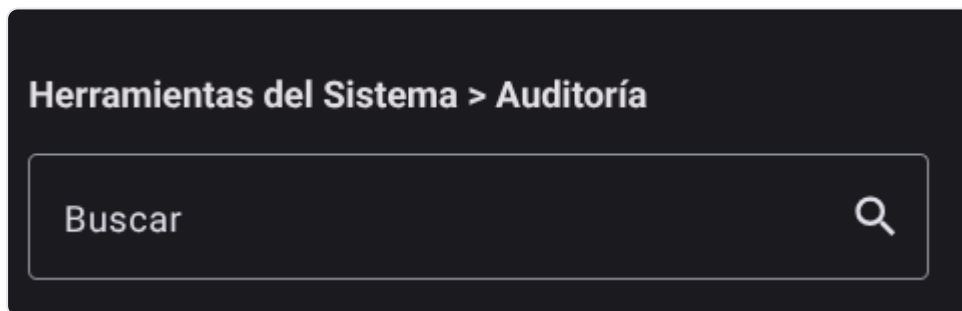
- **Visual Indicator:** A colored icon that summarizes the category of the operation:
 - **Green:** Creation of a new element.
 - **Blue:** Modification of an existing record.
 - **Red:** Deletion of system information.
- **Date:** Exact timestamp (day, month, year and hour) when the action was executed.
- **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": "FoAgYtFMwOKBNx7IUSP", "project": "EL3yJU13jU0IOMzdTh0e", "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

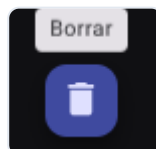
In the top bar, enter any term (such as the name of a menu, the name of a user, or a particular action). The table will update in real time showing only the records that match the search.



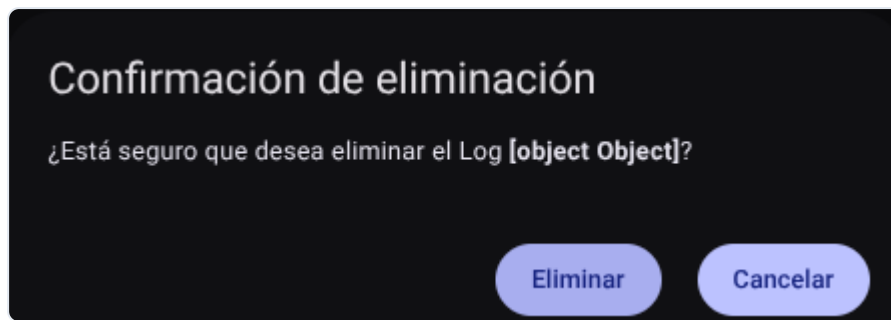
3. Delete a Log Record (If applicable)

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.

Incidentes PEEC

Consulta y gestiona incidencias registradas

Tipo: Todos Estado: Todos

Buscar por # de incidencia

No se encontraron incidencias.

Incidentes PEEC

Consulta y gestiona incidencias registradas

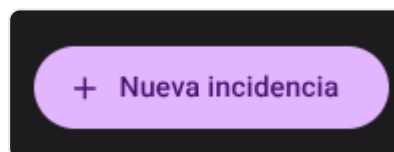
Tipo: Todos Estado: Abierto

Buscar por # de incidencia

No se encontraron incidencias.

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).

Nueva Incidencia en PEEC

1. Clasificación

Visibilidad* Organizacional (toda la organización puede v... ▼

Se añade como label en GitHub

Tipo de incidencia* Bug ▼

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

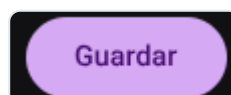
Opcional pero muy útil para reproducir el error.

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.

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 PEEC Unianálisis 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 página

20

Mostrando 1 - 5 de 5

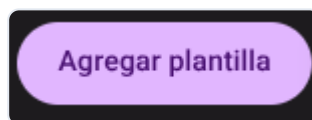
<

>

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 electrónico registrado: <%= email %></div>	

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

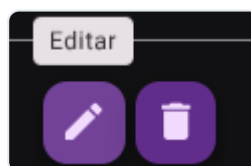
3. Click **"Add"** to register the template.



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*

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.

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 %>

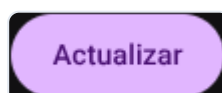
Ingrese [aquí](#) para asignar su contraseña.

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

Actualizar

Cancelar

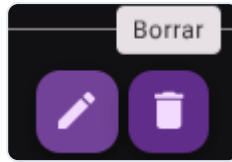
4. Click "**Update**" to apply the changes immediately to system notifications.



4. Delete a Template

To permanently delete a template:

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

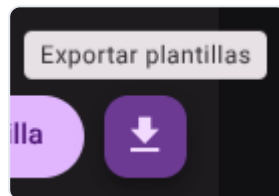


2. confirm the action in the popup modal.

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

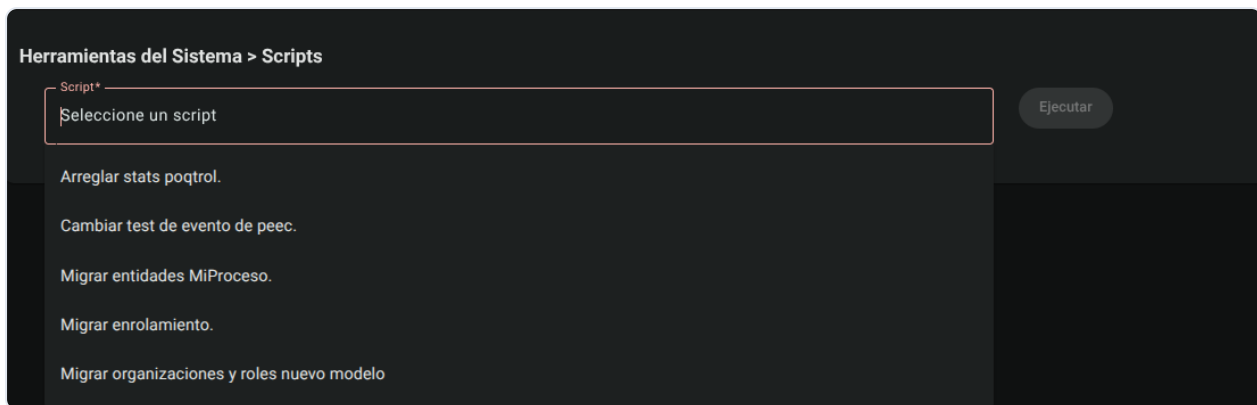
The system has a catalog of predefined scripts.

Herramientas del Sistema > Scripts

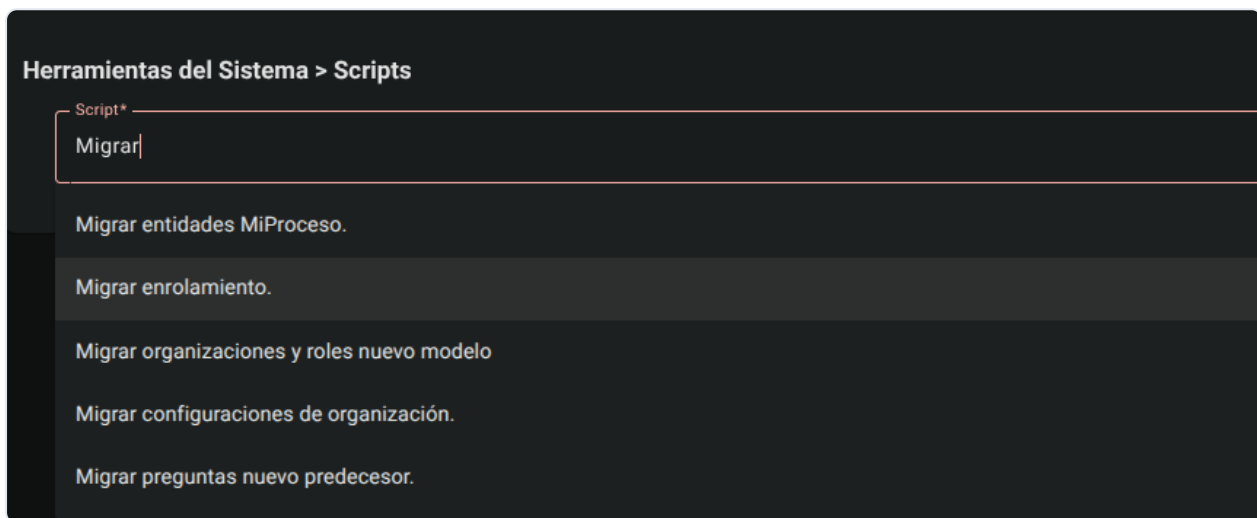
Script*

Ejecutar

1. Click the **Script** field.



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

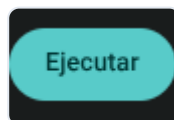


3. Select the required script.

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

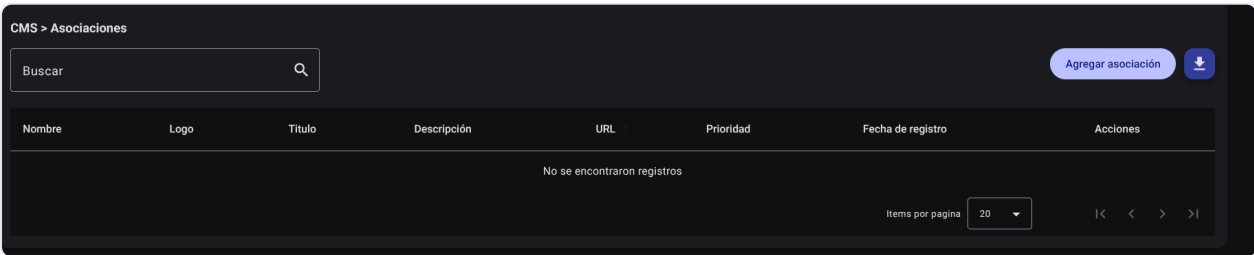
This module is used by:

- **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.

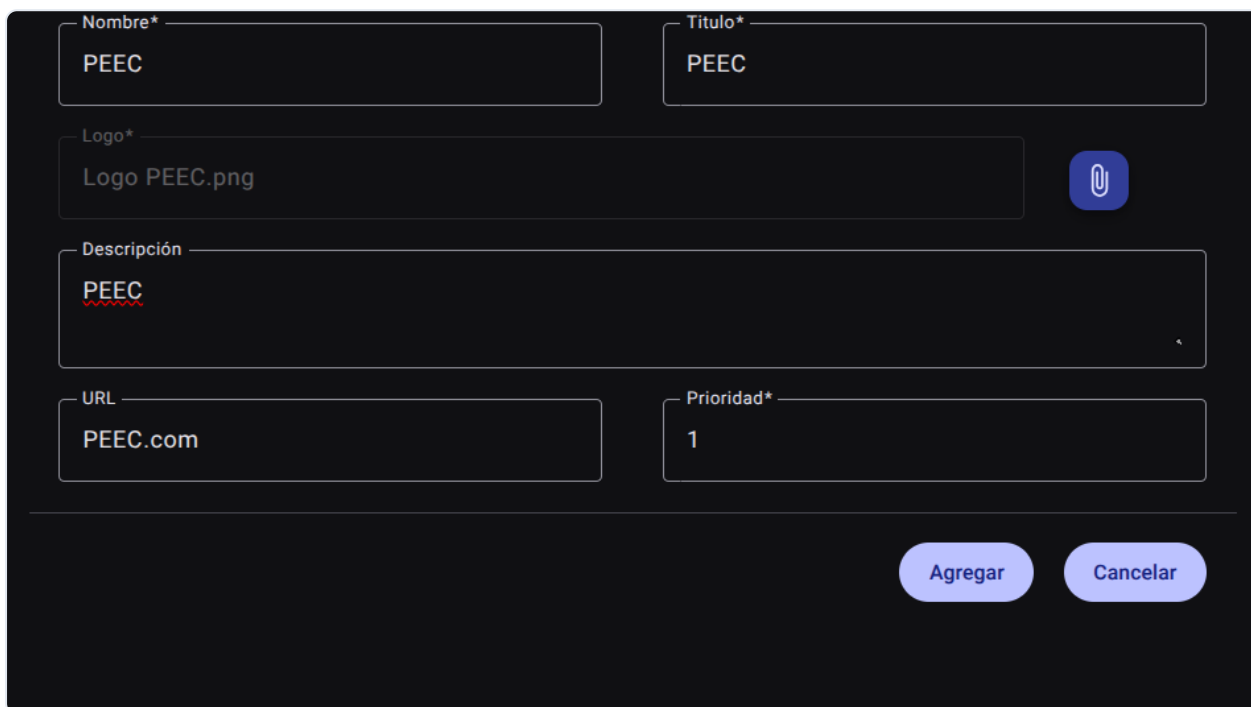


2. Register a New Association

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

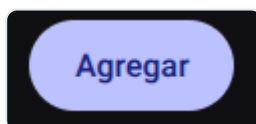
2. Complete the data in the drop-down side form:

- **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.



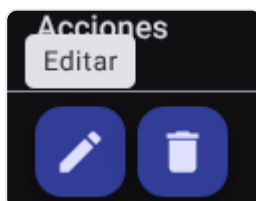
A form for adding a new ally association. It contains the following fields: 'Nombre*' with the value 'PEEC', 'Titulo*' with the value 'PEEC', 'Logo*' with the value 'Logo PEEC.png' and a file upload icon, 'Descripción' with the value 'PEEC', 'URL' with the value 'PEEC.com', and 'Prioridad*' with the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

3. Click "**Add**".

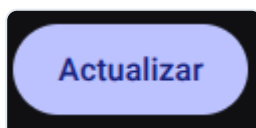


3. Edit or Delete an Association

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

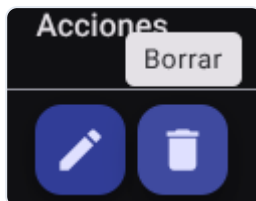


2. Modify the desired fields and save the changes to the **Save** button.

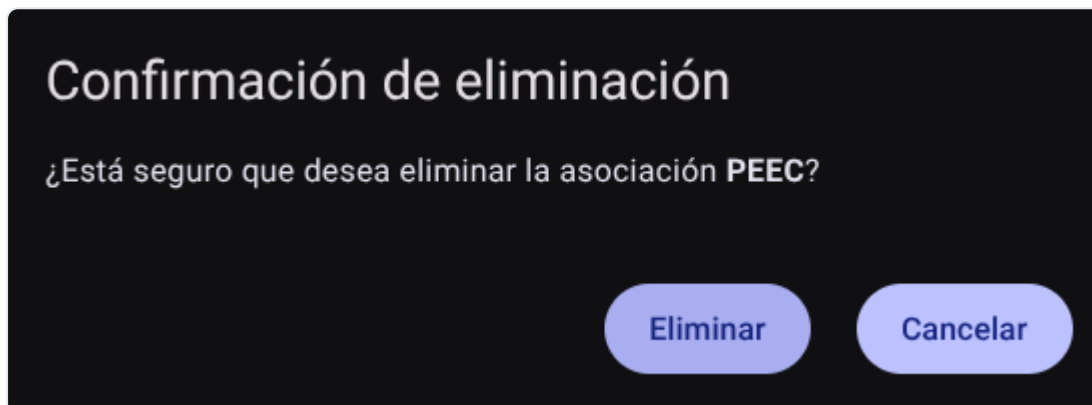


4. Delete an Association

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

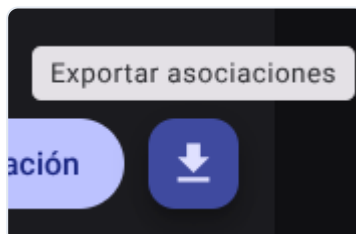


2. confirm the action.



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

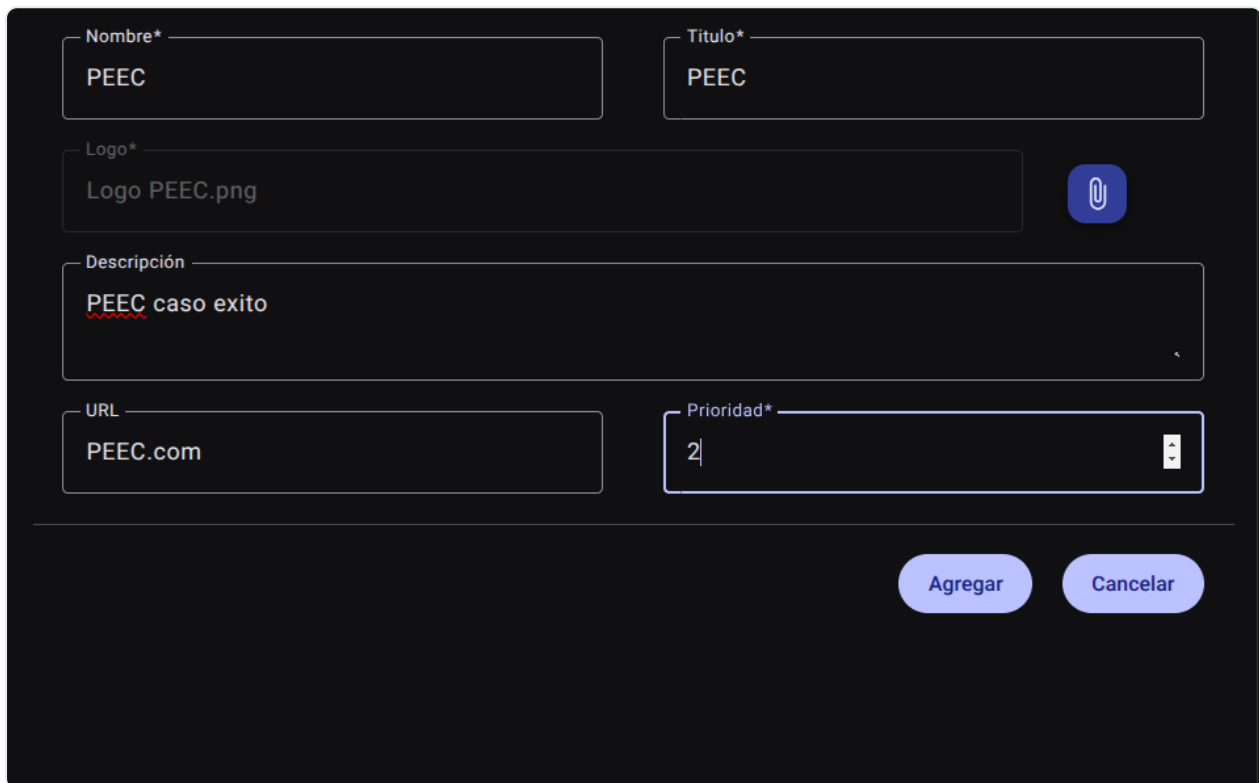
Nombre	Logo	Título	Descripción	URL	Prioridad	Fecha de registro	Acciones
No se encontraron registros							

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.

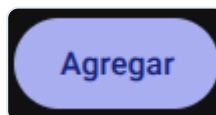


The form is a dark-themed sidebar with the following fields:

- Nombre***: Text input with value "PEEC".
- Titulo***: Text input with value "PEEC".
- Logo***: File upload area showing "Logo PEEC.png" and a paperclip icon.
- Descripción**: Text area with value "PEEC caso exito".
- URL**: Text input with value "PEEC.com".
- Prioridad***: Number input with value "2" and a dropdown arrow.

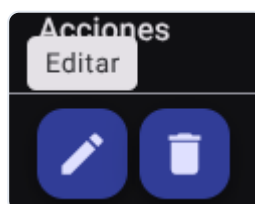
At the bottom right are two buttons: "Agregar" (Add) and "Cancelar" (Cancel).

3. Click **"Add"**.

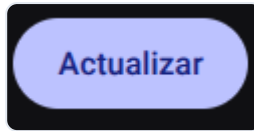


3. Edit or Delete a customer

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

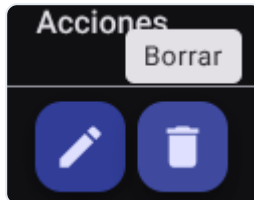


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a consumer

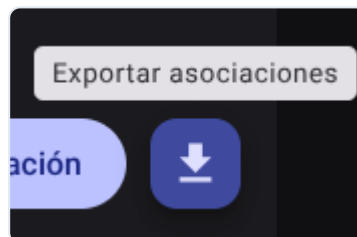
1. To unsubscribe a consumer, use the delete button (trash can icon) in the actions column.



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 página

20

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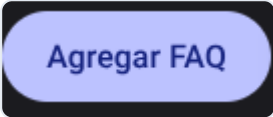
<

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>|

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

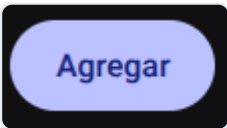
Respuesta*

Configuración completa

Agregar

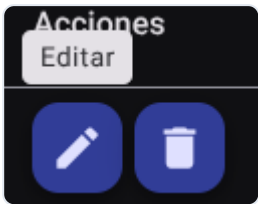
Cancelar

3. Click "Add".

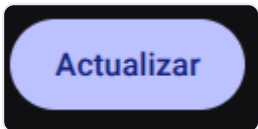


3. Edit an FAQ

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

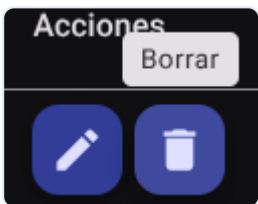


2. Modify the desired fields and save the changes to the **Save** button.

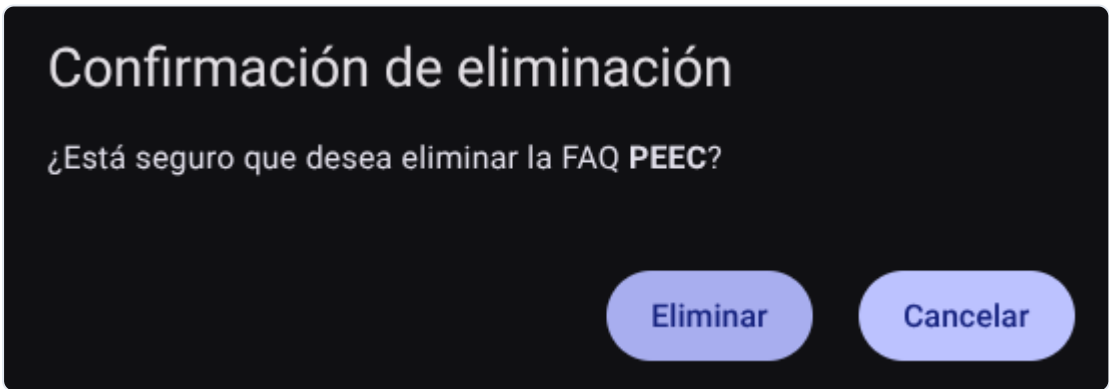


4. Delete an FAQ

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

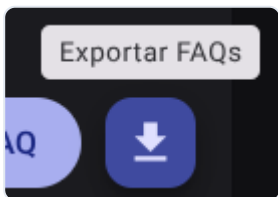


2. confirm the action.



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.

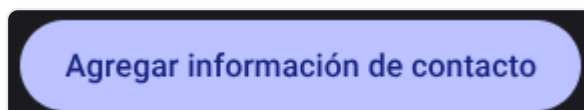
CMS > Informaciones de Contacto

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

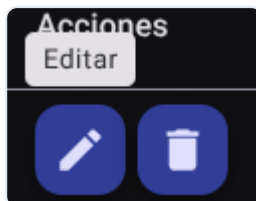
Cancelar

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

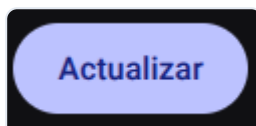


3. Edit a Contact Channel

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

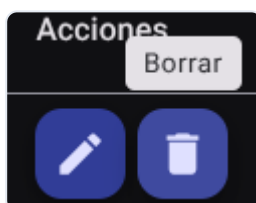


2. Modify the desired fields and save the changes to the **Save** button.

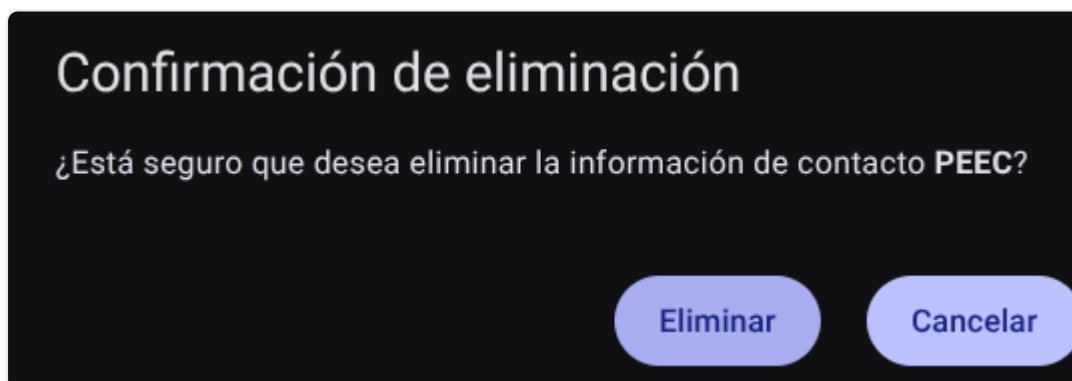


4. Delete a Contact Channel

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

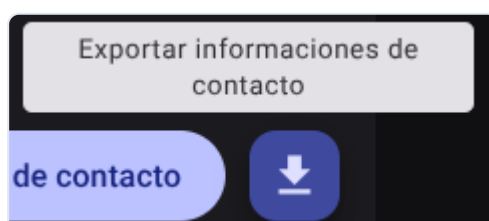


2. confirm the action.



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/

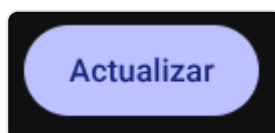
Descripción*

zym app

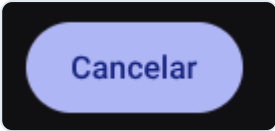
Actualizar

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 rectangular button with a black background and rounded corners. Inside the button is a light blue oval containing the word "Cancelar" in a dark blue, sans-serif font.

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

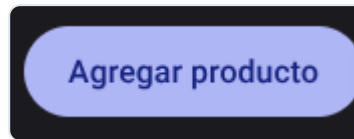
Nombre	Título	Icono	Descripción	URL	Video	Prioridad	Fecha de registro	Acciones
No se encontraron registros								

Items por pagina

20

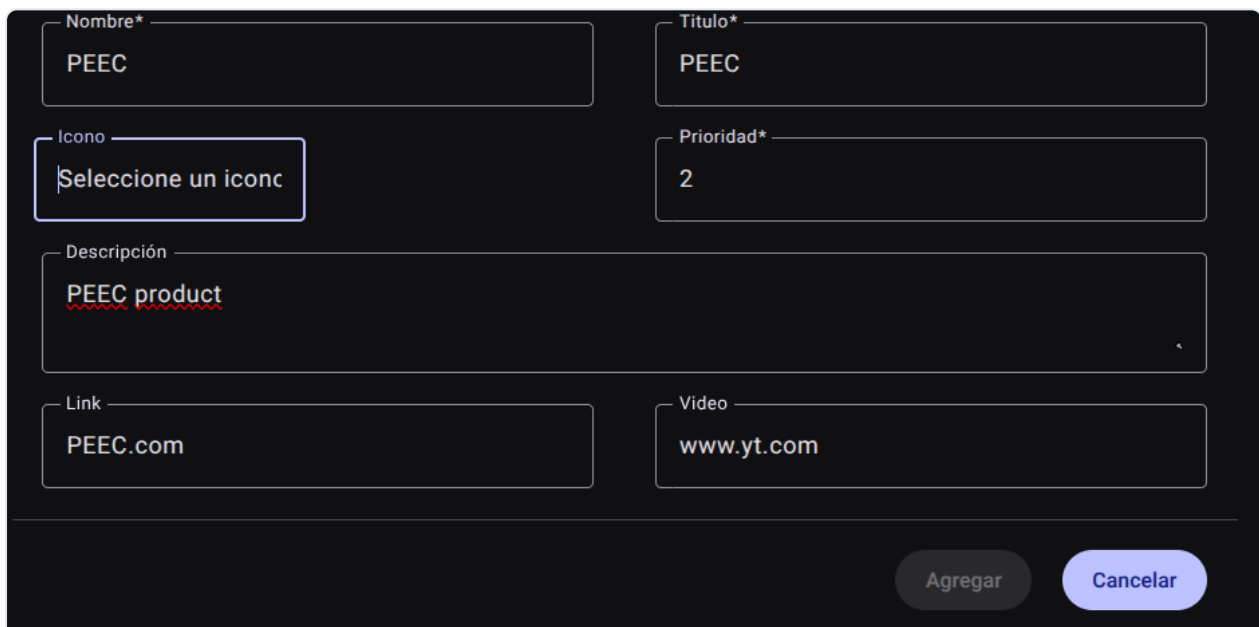
2. Register a New Digital Product

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



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

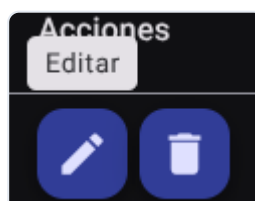
- **Name:** Commercial name of the digital product (e.g. Labcare Cloud, My Process, PEEC).
- **Title:** Slogan or main value proposition of the product.
- **Icon:** Icon identifier for the Material Icons library.
- **Description:** Detailed descriptive text with the modules and scope of the product.
- **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.



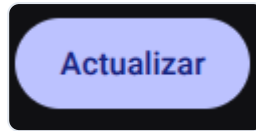
3. Click **"Add"**.

3. Edit a Product

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

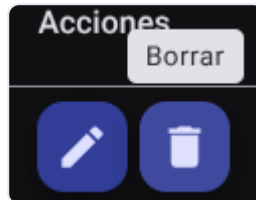


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a Product

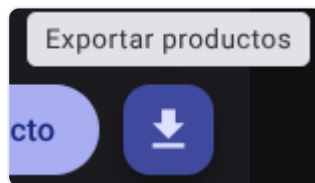
1. To delete a product, use the delete button (trash can icon ) in the actions column.



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

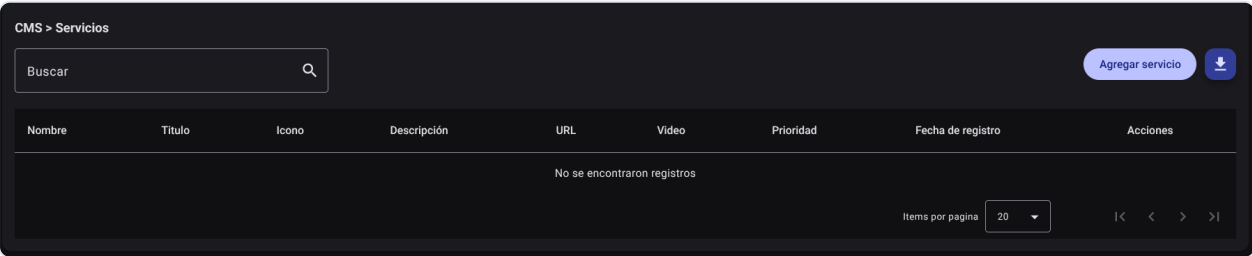
This module is used by:

- **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

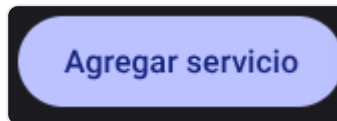
1. Consult the Service Catalog

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.



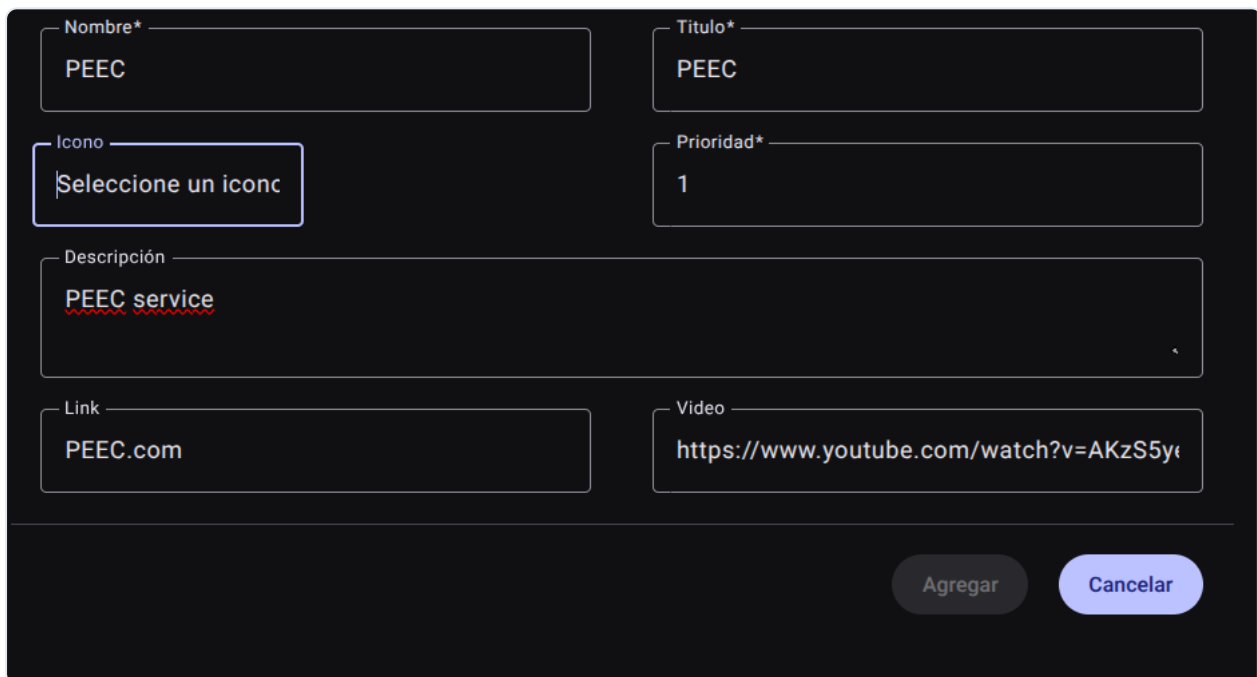
2. Register a New Service

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



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

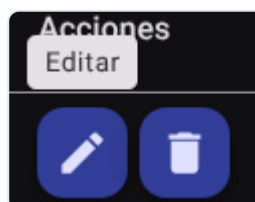
- **Name:** Service identifier name.
- **Title:** Slogan or short heading of the service.
- **Icon:** Name of the Material Icons icon for the cover.
- **Description:** Explanatory detail of the value proposition of the service.
- **URL:** Link to the detailed or service contracting page (optional).
-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



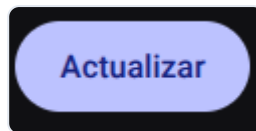
3. Save the changes using the **"Add"** button.

3. Edit a Service

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

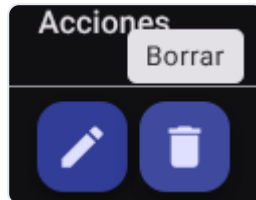


2. Modify the desired fields and save the changes with the **Actualizar** (Update) button.



4. Delete a Service

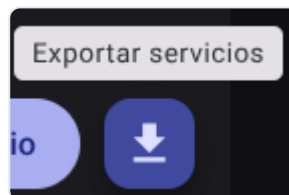
1. To delete a service, use the delete button (trash can icon ) in the actions column.



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

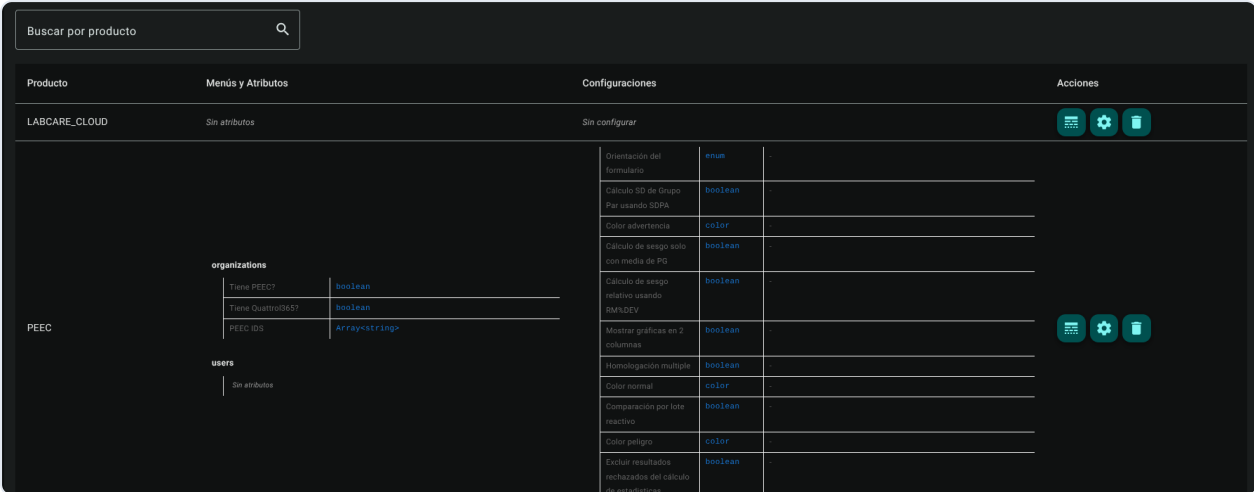
Follow the operation procedures to manage the system parameter grid:

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.).

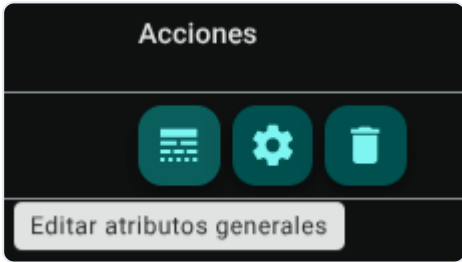
- **Settings:** Presents the global behavior parameters defined under the



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?



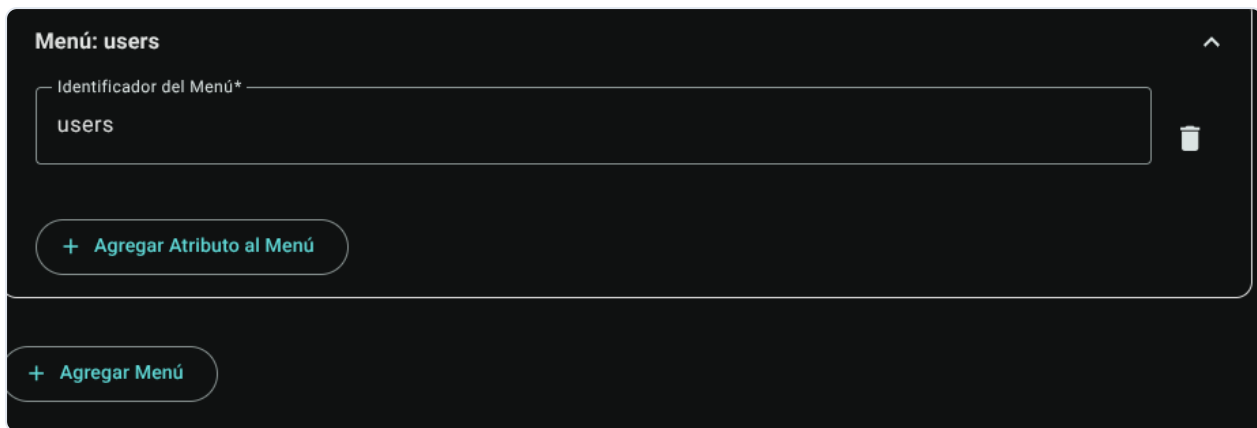
ID Atributo*

has_quattrol

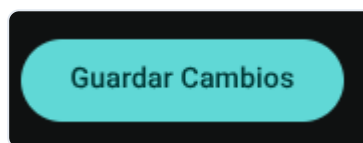
Nombre*

Tiene Quattrol365?

Tipo*



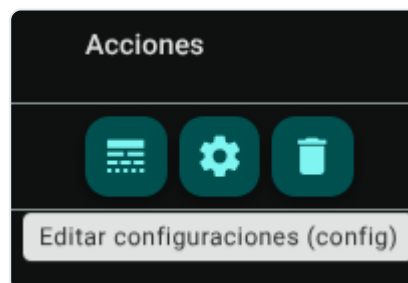
3. Once the parameters are completed, click the **Save Changes** button to apply and consolidate the product forms.



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

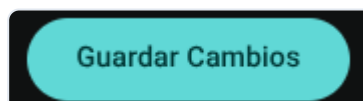
Valor por defecto (Este campo define el valor inicial):

☐ 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	

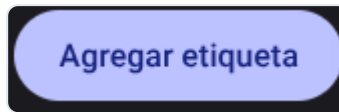
Items por pagina

10

Mostrando 1 - 1 de 1

2. Create a New Tag

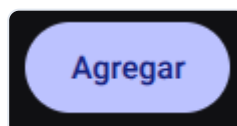
1. Click the **Add Tag** button in the upper right corner.



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

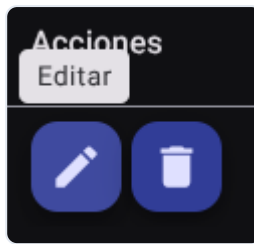
- **Name***
- **Description***
- **Color*** (Click on the bar to open the color selector/palette and define the tone).

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

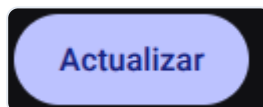
1. In the row of the desired label within the main table, locate the **Actions** column. click **pencil (Edit).



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

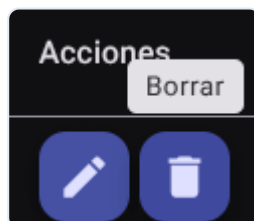
A dark blue form titled 'Acciones' in white. It has three input fields: 'Nombre*' with the text 'etiqueta prueba', 'Descripción*' with the text 'etiqueta prueba', and 'Color*' with a blue color picker bar. At the bottom right, there are two light blue buttons: 'Actualizar' and 'Cancelar'.

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).

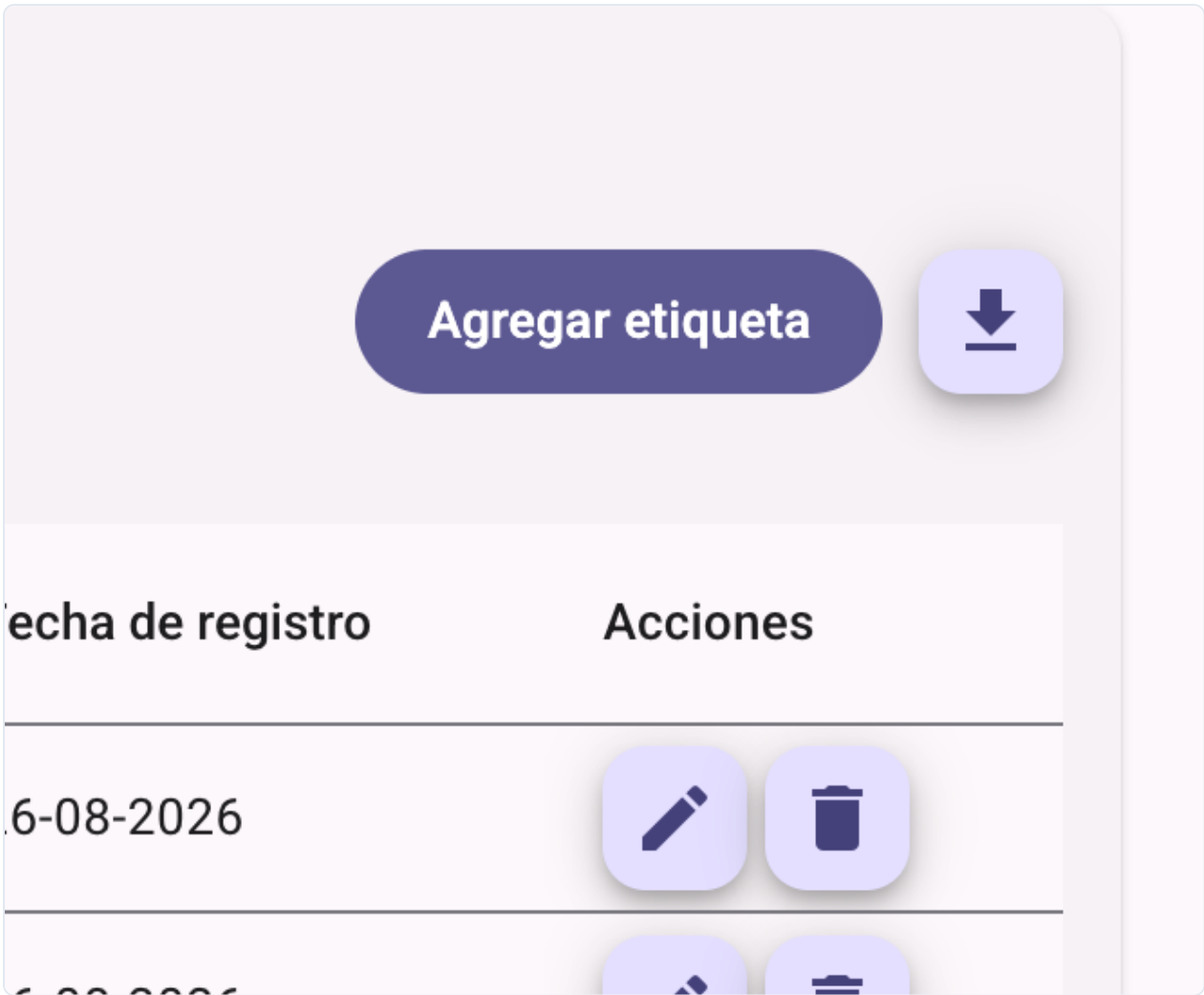


2. The system will display a direct confirmation box.

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 (see image) 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

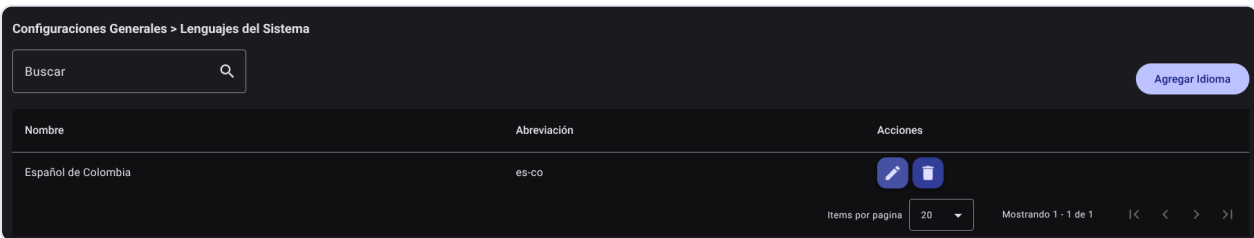
This module is used by system administrators to:

- **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.

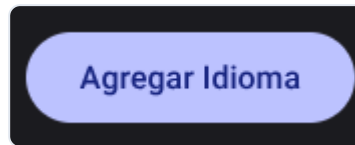


Nombre	Abreviación	Acciones
Español de Colombia	es-co	 

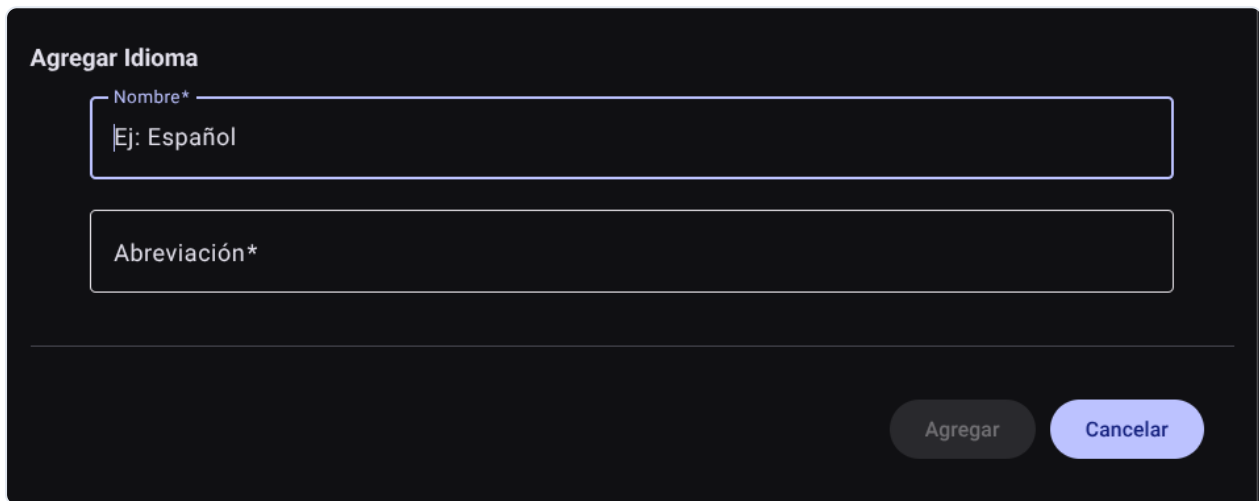
Items por página: 20 | Mostrando 1 - 1 de 1 | < > >|

2. Create a New Language

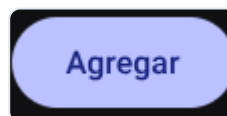
1. Click the **"Add Language"** button in the upper right corner.



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

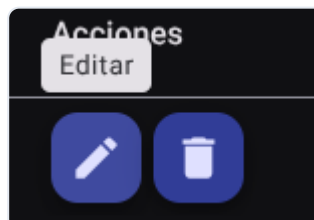


3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new language will be incorporated into the table list.

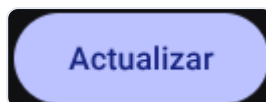


3. Edit an Existing Language

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

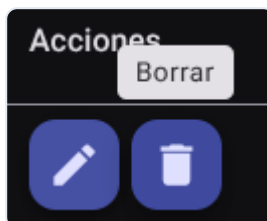


2. Open the side panel with the loaded information to modify the language name or abbreviation.
3. Press the **"Update"** button to save the changes to the system.

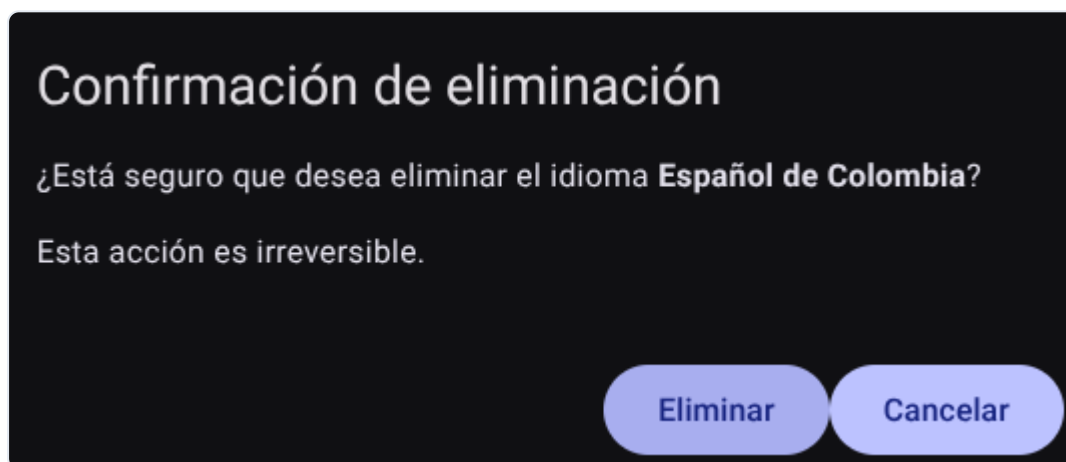


4. Delete a Language

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

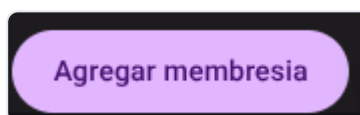
[Aplicar membresía](#)
[Remover membresía](#)
[Cambiar estado membresía](#)
[Agregar membresía](#)

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, POQTROL	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

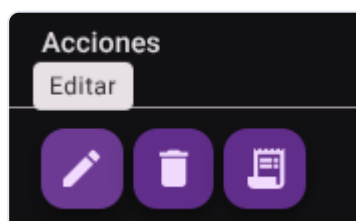
3. Click **"Add"** to register membership on the platform.



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?

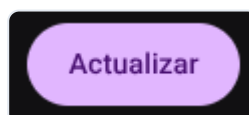
Costo*

Divisa*
 Periodo de pago en dias*

Cantidad de Usuarios*

☒ Midna
☒ PEEC
☐
☒ Quattrol 365
☐
☐
☐

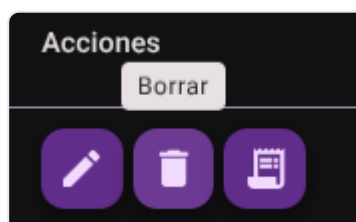
3. Click **"Update"** to apply the changes immediately.



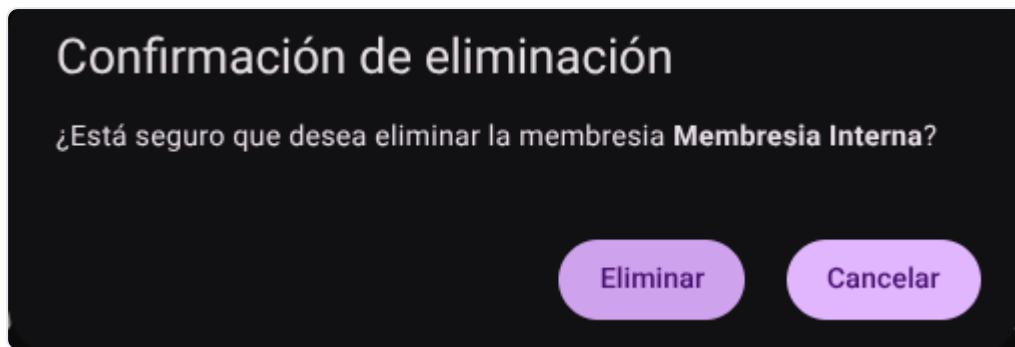
4. Delete a Membership

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.

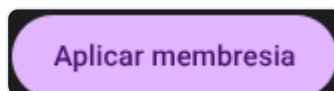


WARNING: The deletion action is irreversible and will be rejected by the system if the membership is currently assigned to any active organization on the platform.

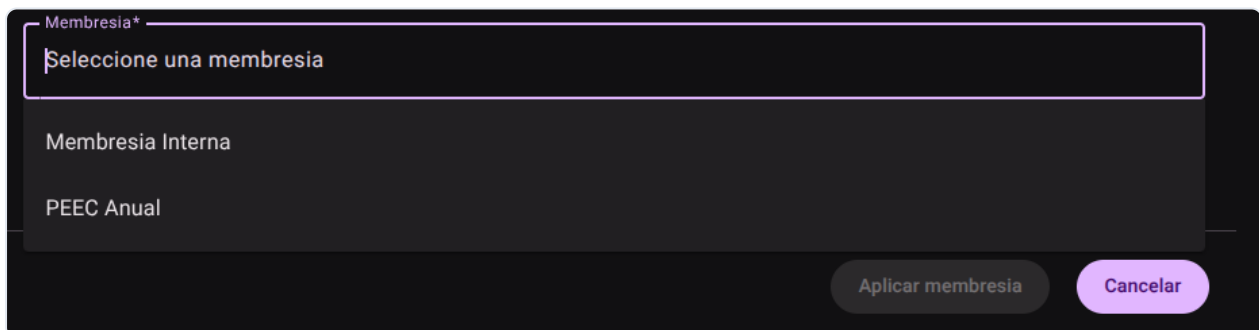
5. Apply Membership to Organizations

To associate a subscription with one or more client organizations:

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



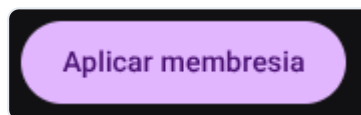
2. Select the desired membership from the drop-down list.



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

The screenshot shows a web interface for selecting a membership. At the top, there is a label "Membresia*" followed by a dropdown menu currently displaying "Membresia Interna". Below this, there are two radio button options: "V1 Argorn" (which is unselected) and "V2 Midna" (which is selected). Underneath the radio buttons is another label "Organizaciones" followed by a dropdown menu that says "Seleccione una organization". This dropdown menu is open, showing a list of organizations: "ESE Hospital San Vicente de Paul Apia", "Fac Cacom 2", "Laboratorio Clínico Biosare", "Angel Diagnostica Costa", and "Oncologos de Occidente".

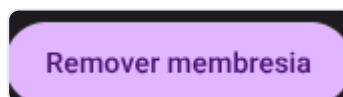
4. Click **"Apply Membership"** to grant access to the platform.



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.

The screenshot shows a web interface for removing a membership. It features two dropdown menus. The first dropdown, labeled "Organización*", is set to "ESE Hospital San Vicente de Paul Apia". The second dropdown, labeled "Membresia*", is set to "PEEC Anual". At the bottom right of the form, there are two blue, rounded rectangular buttons: "Remover membresia" and "Cancelar".

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

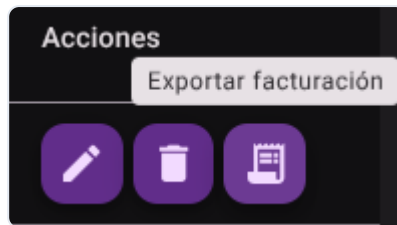
4. Press "**Apply Status**" button to apply.

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.

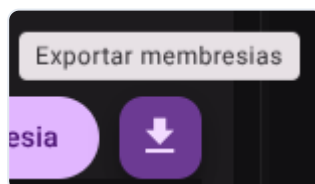
A dark-themed pop-up window titled 'Exportar facturación Membresia Interna'. It features a text input field labeled 'Mes a registrar*' (Month to register*) containing '08/2026' and a calendar icon. At the bottom, there are two light blue buttons: 'Exportar' (Export) and 'Cancelar' (Cancel).

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

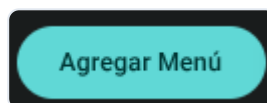
Buscar

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.



- 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).



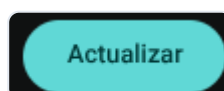
3. Edit an Existing Menu

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



 src="file:///Users/andres/Development/zymDevTeam/zymdev-midna-web-angular/docs/core/public/assets/menus_del_sistema_imagen5.png" />

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



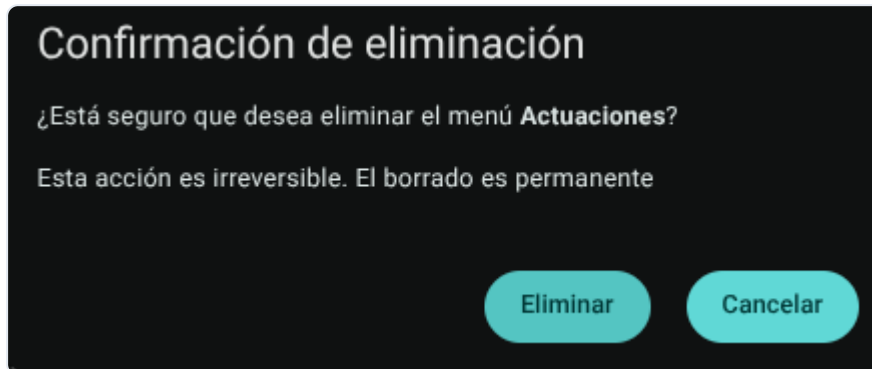
4. Delete a Menu

- 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 

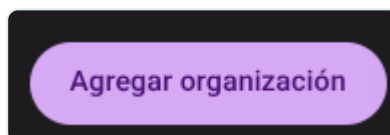
[Agregar organización](#) 

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?

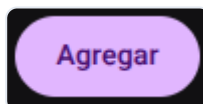
☐ Tiene Quattrol365?

PEEC IDS

+

Agregar Cancelar

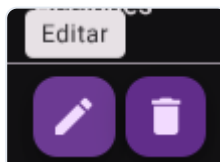
3. Press the **"Add"** button to save the record.



3. Edit an Organization

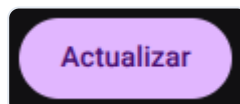
If you need to update pre-existing information of any entity:

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.

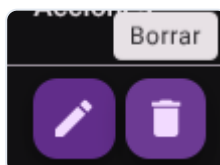
3. Make any necessary changes to the name, location, domain, or mapping of your parent hierarchical organization. There are no technical restrictions for updating these fields.
4. Click **"Update"** to apply the changes to the database.



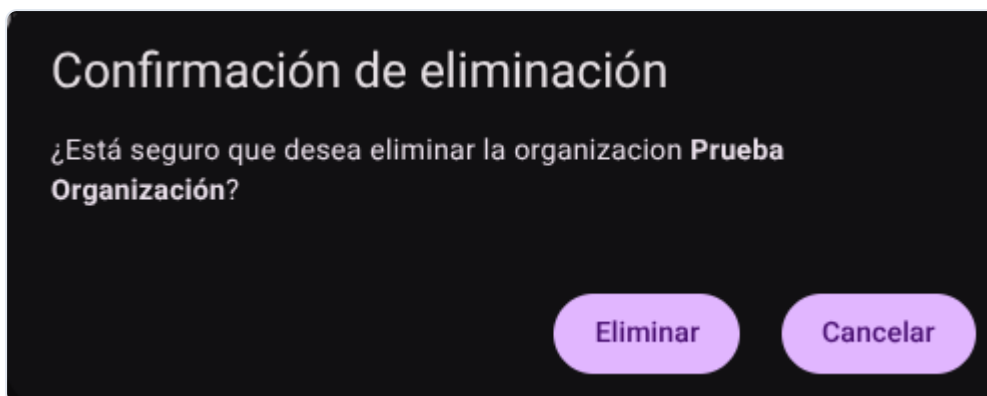
4. Delete an Organization

To permanently remove an entity from the platform:

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



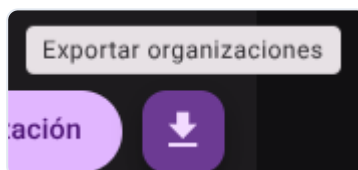
2. A confirmation modal will open warning that the action is irreversible and will affect the related data.



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

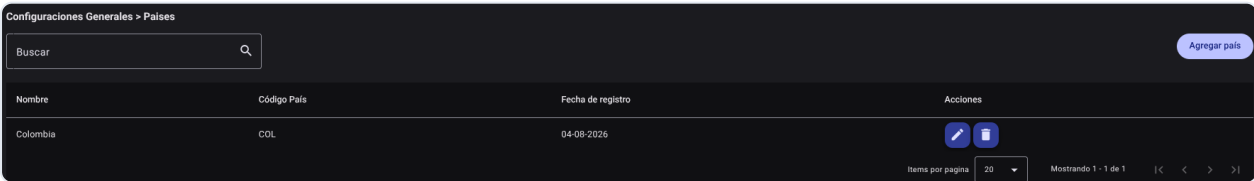
This module is used by system administrators to:

- **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`).

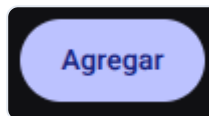


2. In the main table, consult the list of registered countries with their codes.
3. To register a new country, click **"Add Country"** and enter the Official Name and Code.

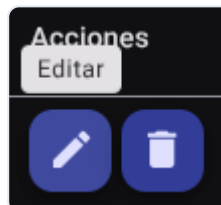


A dark-themed form for adding a country. At the top, there is a blue button labeled "Agregar país". Below it, the form has two input fields: "Nombre*" with a placeholder "Ingrese el nombre" and "Código País*". At the bottom right of the form, there are two buttons: a grey "Agregar" button and a blue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

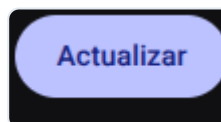
4. To add the country you must click the ****Add**** button



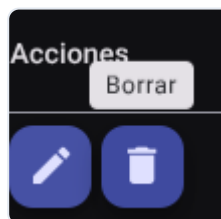
4. To modify an existing record, use the edit button (pencil icon).



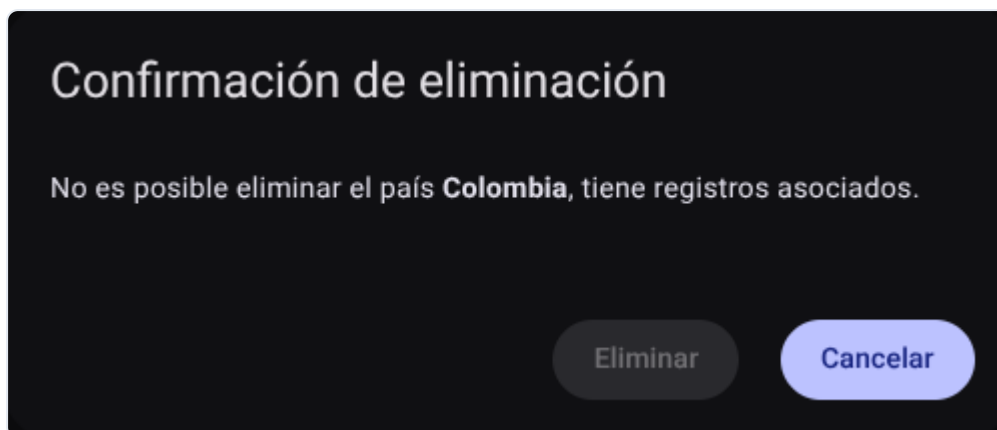
5. To save, click on the **Update** button at the bottom.



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.

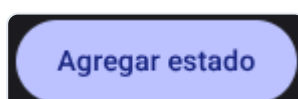
Configuraciones Generales > Estados

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)

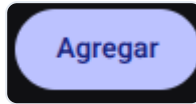
Agregar Cancelar

Ciudades (Presiona Enter o Coma para agregar)

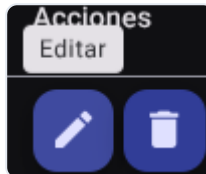
Bogotá ✕

Nueva ciudad...

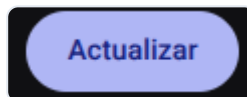
4. To add the **state** you must click the "**Add**" button.



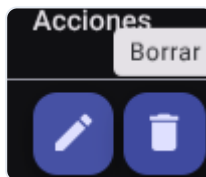
5. To modify an existing record, use the edit button (pencil icon).



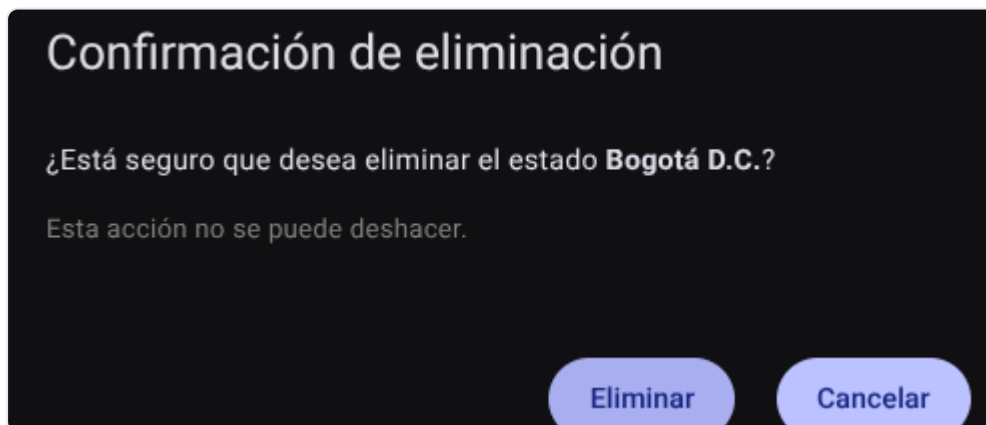
6. To save your changes, click the "**Refresh**" button at the bottom.



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)*

1

Tema por defecto*

theme-quattrol-dark

Mensaje de bienvenida*

Logo URL

Link de soporte

Link de incidencias

Límite de tamaño general (MB)*

1

Personalización de Vistas



Mostrar información tributaria en perfil



Mostrar todas las membresías globales

Temas Disponibles

Añadir tema



Agregar

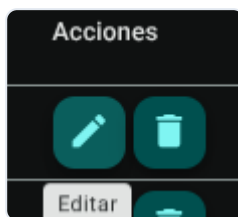
Cancelar

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

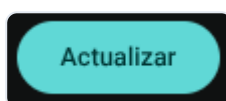
Agregar

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**).

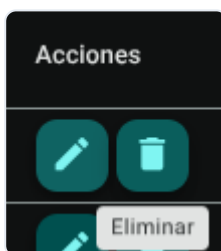


2. The panel with the loaded product information will be displayed, make the necessary adjustments and save using the "**Update**" button.

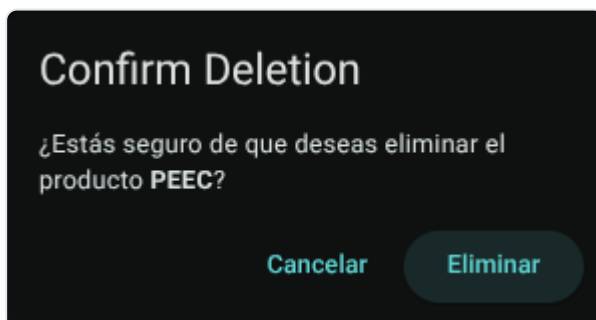


4. Delete a Product

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

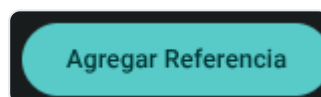
1. Consult and Filter References

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/WgMHLBjVooxwKqKKD	 
URL_PEEC_CERTIFICATION_APP_SCRIPT	https://script.google.com/macros/s/AKfycbxaAM-uS_p7u05EBMeOstgtKi-datsxIRdKh8tc_QcgaAIR0rGZdHbnS-mPBwflg/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:

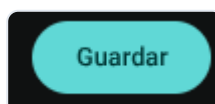
☒ URL
 ☐ Referencia BD

Valor o URL*

Guardar

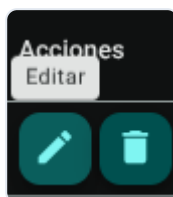
Cancelar

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

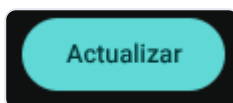


3. Edit an Existing Reference

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

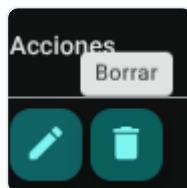


2. The **Edit Reference** panel will be displayed; Modify the key, change the mode (URL / BD) or update the route and save the changes using the **"Update"** button.

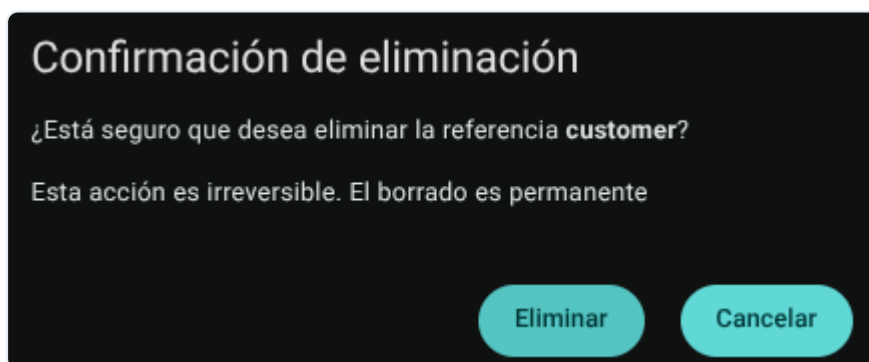


4. Delete a Reference

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

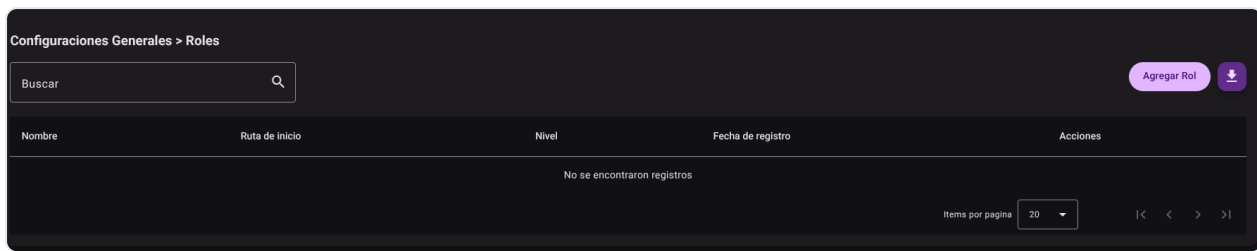
This module is used critically by Platform Administrators to:

- 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

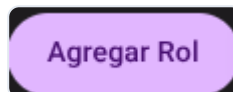
Shows the list of roles configured in the system with their essential data: the name of the role, its initial assigned path, the level and the entry date.



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

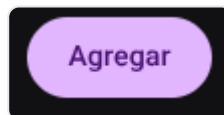
+

Roles ✕

Agregar

Cancelar

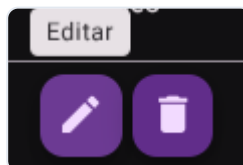
4. Click **"Add"** to save the role.



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

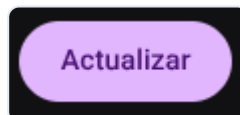
Roles

+

Actualizar

Cancelar

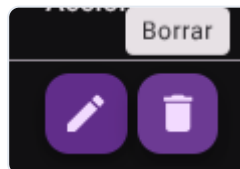
3. Click **"Update"** to apply the changes immediately.



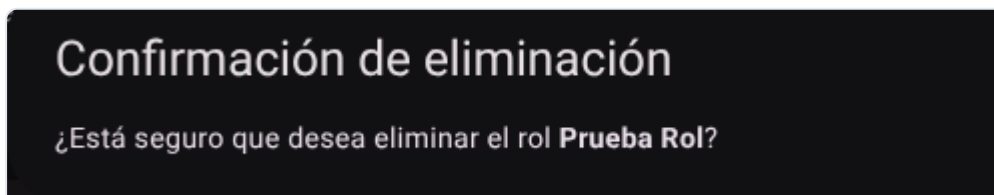
4. Delete a Role

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

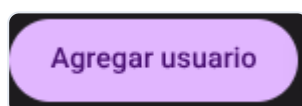
Nombre	Apellido	Tipo de usuario	Nombre de usuario	Email	Telefono interno	Acepta TyC	Cargo	Idioma	Esta activo?	Fecha de registro	Acciones
Astrid Camila	Martinez Medina	Usuario	Astrid Camila Martinez Medina	Astridcamila2009@hotmail.com	3106536534	Si	Bacteriologa	Español	No	06-05-2026	
Marcela Adriana	Deantonio 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".

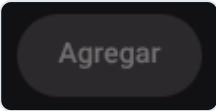


2. Fill out the form with the basic information:

- **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 <table> <tr> <th>Nombre</th><th>Apellido</th><th>Tipo de usuario</th><th>Nombre de usuario</th><th>Email</th></tr> <tr> <td>Astrid Camila</td><td>Martinez Medina</td><td>Usuario</td><td>Astrid Camila Martinez Medina</td><td>Astridcamila2009@hotmail.com</td></tr> <tr> <td>Marcela Adriana</td><td>Deantonio Monroy</td><td>Usuario</td><td>Marcela Adriana Deantonio Monroy</td><td>alecramad77@gmail.com</td></tr> <tr> <td>Mario</td><td>Duque</td><td>Usuario</td><td>Mario Duque</td><td>laboratoriomaduma@hotmail.com</td></tr> <tr> <td>Kerlys</td><td>Esparragoza</td><td>Usuario</td><td>Kerlys Esparragoza</td><td>Kerlys96@hotmail.com</td></tr> <tr> <td>Dinamica</td><td>Clinica de la Mujer</td><td>Usuario</td><td>Dinamica Clinica de la Mujer</td><td></td></tr> <tr> <td>DINAMICA SEDE URGENCIAS</td><td>SURA</td><td>Usuario</td><td>DINAMICA SEDE URGENCIAS SURA</td><td>miledepe@dinamicaips.com.co</td></tr> <tr> <td>Adriana</td><td>Guerra Martinez</td><td>Usuario</td><td>Adriana Guerra Martinez</td><td>adguemar@hotmail.com</td></tr> <tr> <td>Nancy Patricia</td><td>Martinez Barrera</td><td>Usuario</td><td>Nancy Patricia Martinez Barrera</td><td>nanpamaba@yahoo.es</td></tr> <tr> <td>Diana</td><td>Quiñones Bacareo</td><td>Usuario</td><td>Diana Quiñones Bacareo</td><td>info@dqlaboratorio.com</td></tr> </table>	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	<table> <tr> <td>Nombre*</td><td>Santiago</td><td>Apellido*</td><td>Casallas</td></tr> <tr> <td>Email*</td><td>santiago.casallas@zymdev.com</td><td>Telefono*</td><td>3054070606</td></tr> <tr> <td>Cargo*</td><td>Administrative Assistant</td><td>Idioma*</td><td>Español</td></tr> <tr> <td>Dirección de residencia</td><td>el 1</td><td>Barrio</td><td></td></tr> <tr> <td>Ciudad</td><td>Bogotá</td><td>Estado</td><td></td></tr> <tr> <td>Pais</td><td></td><td></td><td></td></tr> <tr> <td>Tipo de documento de identidad</td><td>CC</td><td>Numero de documento de identidad</td><td>1234567890</td></tr> <tr> <td>Fecha de expedición del documento de identidad</td><td></td><td>Fecha de nacimiento</td><td></td></tr> </table> Organizaciones y roles <table> <tr> <td>Organización</td><td>Oncólogos de Occidente</td></tr> <tr> <td>Rol principal</td><td>PEEC Química Clínica y Hematología</td></tr> </table>	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		Organización	Oncólogos de Occidente	Rol principal	PEEC Química Clínica y Hematología
Nombre	Apellido	Tipo de usuario	Nombre de usuario	Email																																																																																			
Astrid Camila	Martinez Medina	Usuario	Astrid Camila Martinez Medina	Astridcamila2009@hotmail.com																																																																																			
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Organización	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.

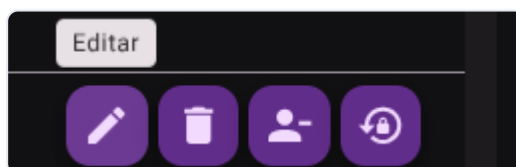
Add Patient

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.

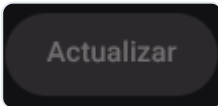
3. Edit a User

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.

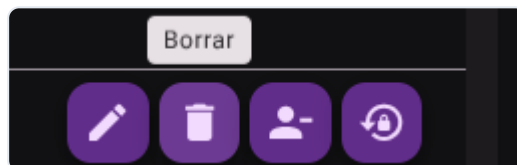
WARNING: For security and login integrity (authentication) reasons, the email address cannot be modified once the account has been created.

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

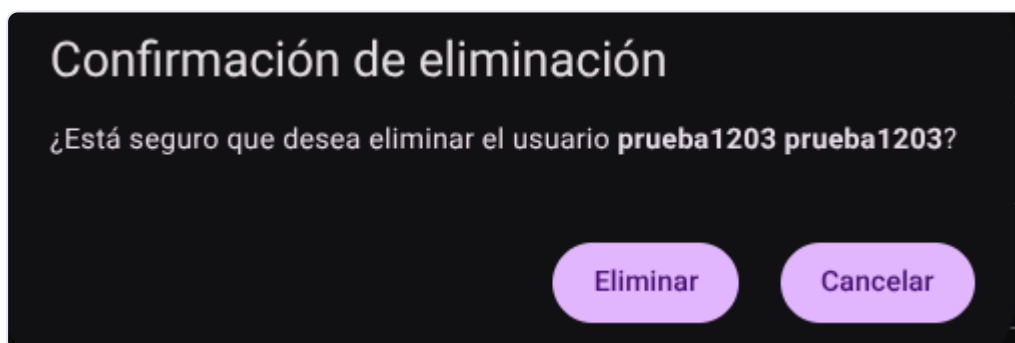
4. Delete a User

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.



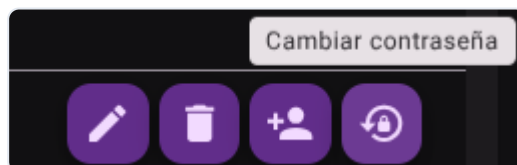
2. The system will toggle the **Are You Active?** between **Yes** (access allowed) **No** (access temporarily denied).

Esta activo?
No
Si

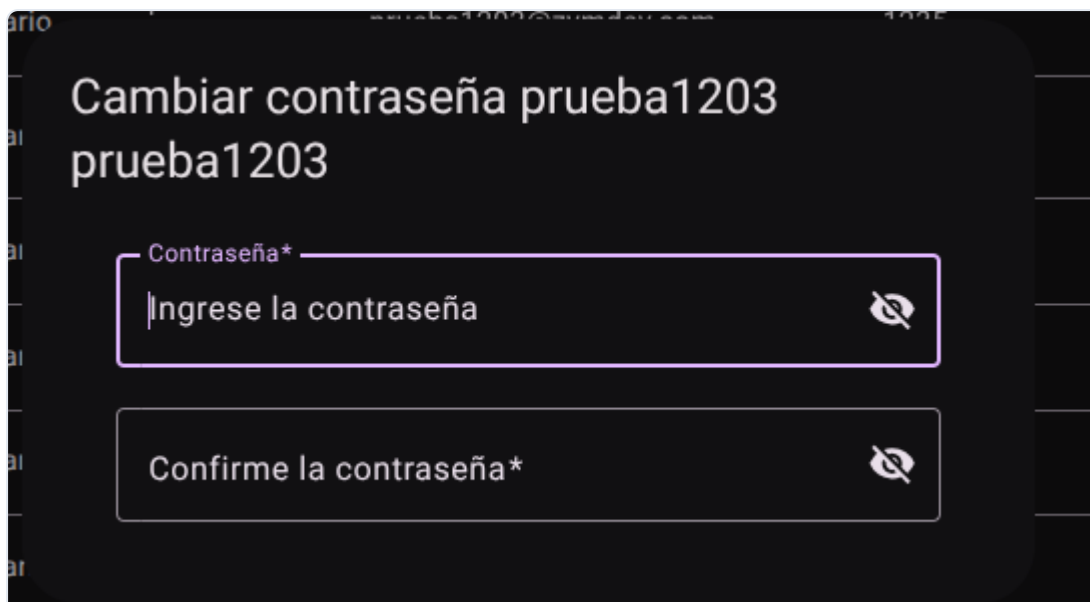
6. Change Password from the Administrator

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.



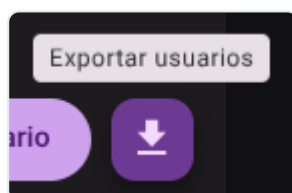
2. In the pop-up form, enter the new password and confirm it in the corresponding verification field.



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

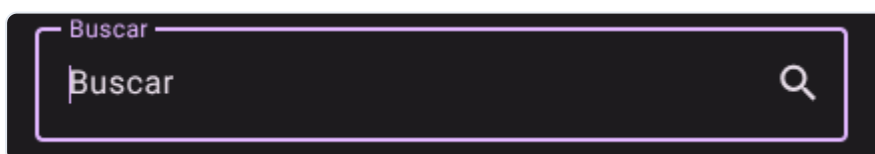
7. Export User List

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.

Alarm Control Center and Expiration of Terms

Description, Purpose and Objective

NOTE: The **Alarm Control Center** view is the legal module responsible for consolidating, tracking and alerting on all procedural terms, due dates and reminders configured for the organization's judicial files.

A **Process Alarm** represents a critical temporal milestone associated with a case action. Its structure contemplates:

- **Main Alarm:** The final deadline date and time (e.g. *Expiration of the term to respond to the demand*).
- **Reminder (First Notice):** An early alarm programmed in advance to give the lawyer room to maneuver.
- **Alert States:** The life cycle of the alarm and its reminder, which can be in *Scheduled* (Scheduled), *Sent* (Sent), *Completed* (Completed) or *Cancelled* (Canceled) status.

The objective of this view is to centralize the legal firm's expirations in a single alert calendar, preventing non-extendable legal terms of the Judicial Branch from going unnoticed.

Context of Use

This panel is consulted daily by:

- **Lawyers and Partners of the Firm:** To plan your weekly agenda and prioritize the filing of memorials according to the alerts closest to expiring.
- **Judicial Dependents:** To verify the sending and delivery of reminders and mark the executed procedural tasks as completed.

Possible Actions

1. Consult and Search Consolidated Alerts

The panel presents an integrated list with all the current alarms of the organization, both from the "My Processes" files (manual) and from "CPNU Notifications" (automatic).

- **Search Bar:** Search for alerts by entering the filing number, the name of the plaintiff or the defendant.
- **Ordering:** Click on the columns (e.g. *Alarm*, *Reminder*) to organize the agenda chronologically from the most urgent to the most distant.

Servicios > Alarmas




Alarma	Tipo	Proceso	Demandante	Demandado	Estado	Recordatorio	Estado del recordatorio	Fecha de registro	Acciones
No se encontraron registros									

Items por pagina 20





2. Access the File Details from the Alert

If you need to review the judicial action that generated the alarm:

- 1. Locate the alert in the table.
- 2. Click on the filing number in the **"Process"** column.
- 3. The system will directly open the detailed window of the file in the actions tab so that you can consult the memorials and attached supporting documents.

3. Delete Alerts

If a deadline is canceled by court order or was set incorrectly:

- 1. Click the **"Delete"** button (trash icon ) in the alarm actions column.
- 2. Confirm the action in the security message. The system will suspend scheduled email reminders immediately.

4. Export Due Date Schedule

Click the download button at the top right of the screen to export the organization's alarm consolidated to **.CSV** format and integrate it with external corporate calendars.

Required Technical Permits

Viewing and managing the calendar of procedural terms requires:

- `alarms_read` or `processes_alarms_read` : Allows access to the consolidated alarm table.
- `alarms_create` or `alarms_update` : Enables the creation of reminders and alerts within the process actions.
- `alarms_delete` : Authorizes the deletion of scheduled alarms.
- `alarms_export` : Allows you to download the terms report in **.CSV** format.

File Management in My Processes

Description, Purpose and Objective

NOTE: The **My Processes** module is the central legal control console designed for the management, consultation, organization and detailed monitoring of judicial files within the platform. Its objective is to unify the administration of cases, allowing files to be classified automatically according to their origin or official source, control their actions and maintain operational consistency in the daily monitoring of litigation.

Context of Use

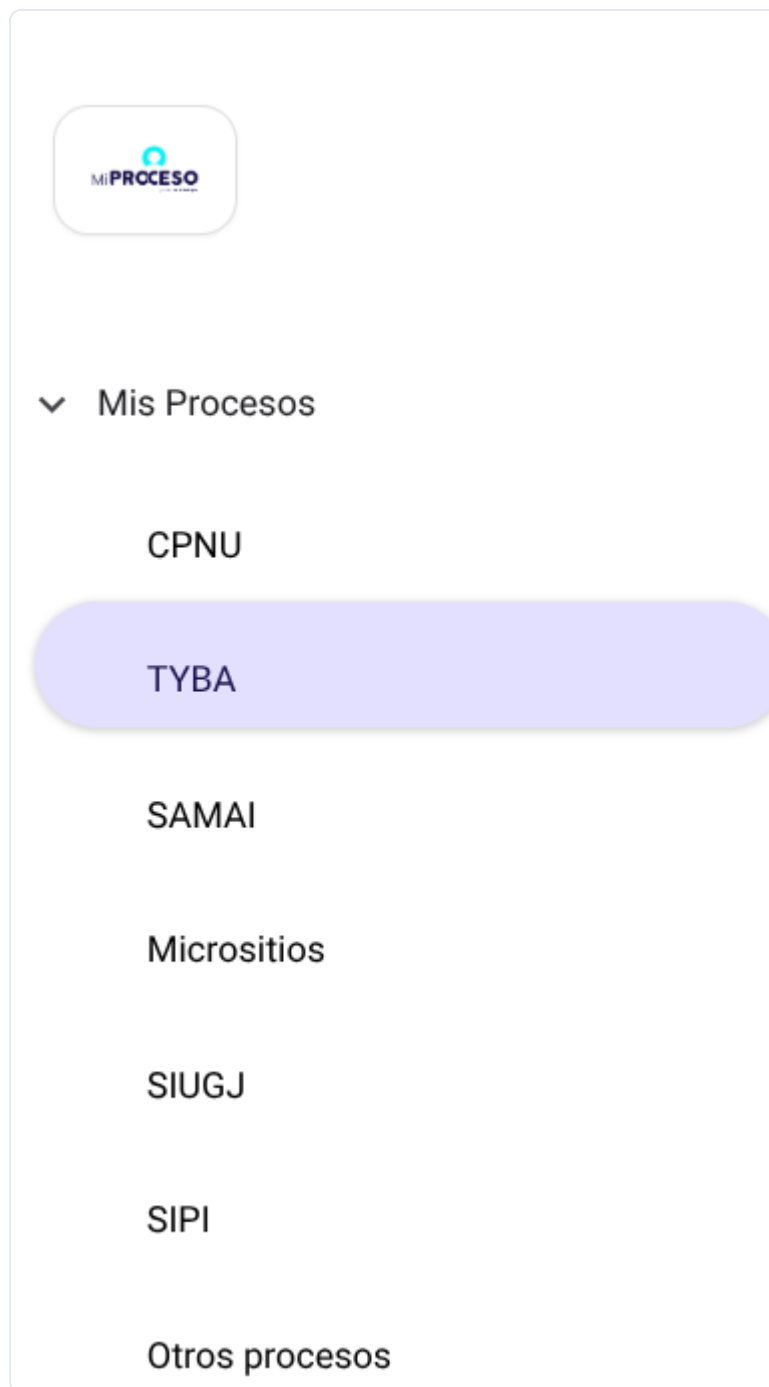
This panel is operated daily by lawyers, judicial clerks and law firm directors to:

- Monitor actions and procedural terms of ongoing lawsuits.
 - Consult office movements through official integrations or manual records.
 - Archive completed processes and keep the legal portfolio organized.
-

1. Structure and Organization by Submodules (Left Panel)

The platform divides and organizes the files into folders or submodules in the side panel according to the system or public entity of origin:

- **Categorization by sources:** Filings are automatically classified as they are incorporated into the system under the following folders:
 - **CPNU:** Unified National Process Consultation of the Judicial Branch.
 - **TYBA:** Files from the TYBA judicial platform.
 - **SAMAI:** Processes of the Administrative Litigation jurisdiction (Council of State).
 - **Microsites:** Courts and offices with publication on isolated pages or microsites of the Judicial Branch.
 - **SIUGJ:** Unified Judicial Management Information System.
 - **SIPI:** Industrial Property System (Superintendency of Industry and Commerce).
 - **Other processes:** Additional entities or custom manual records.
- **Interface consistency:** In order to simplify the workflow, all submodules inherit the same table display, data fields, metadata columns, and individual and bulk management instruments.



2. Search, Filtering and Process Creation

To manage the file tray, the module has the following superior options:

- **Create Process:**

1. Click the green **Create Process** button in the upper right corner.
2. In the pop-up side panel, enter the regulatory **23-digit Address**.
3. Press the **Validate process** button to check its existence and validate data.
4. Click **Save** to finish registration. The case will be automatically classified within the active submodule.

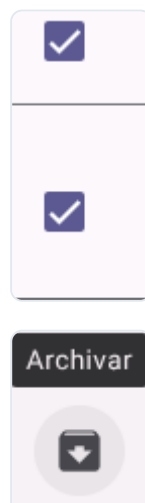
- **Temporary search and query:**
 - **General search engine:** Use the entry bar (*Search*) to quickly locate files by their assigned filing or office number.
 - **View status by date:** Define a specific time interval or range to examine behavior and performance history in that time window.
- **Export data:** Press the download icon located next to the *Create Process* button to export the complete list of files with their main metadata to a local file.

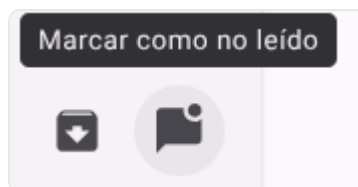


3. Mass Actions (Box Selection)

By checking the checkbox (*checkbox*) next to one or more files in the list, the following batch administration buttons will be dynamically activated in the header:

- **Archive / Unarchive:**
 - Click on the corresponding button to move the selected files to the **Archived** historical repository (outside the daily operational view).
 - To view or retrieve these logs, activate the **Archived** master switch. Select the desired files and press the recovery button to restore them to the main list.
- **Mark as read / unread:** Use the envelope icon to toggle the visual status of reading the news of the selected cases, allowing the team to know which files have actions pending review.



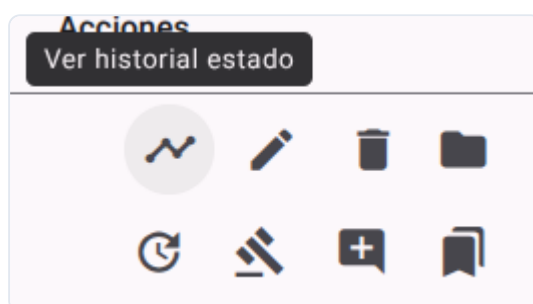


4. Individual File Management (Actions Column)

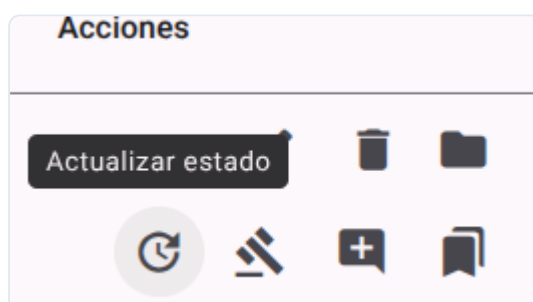
Each entry in the table has a menu of tools in the **Actions** column to interact in a unitary way with the case:

History and Synchronization

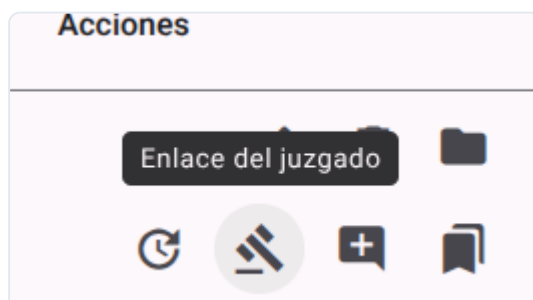
- **View status history:** Displays the complete schedule of actions and historical events detected by the system for that filing.



- **Update status:** Forces a request to the server to consult, validate and integrate any new action at that moment directly from the source office.

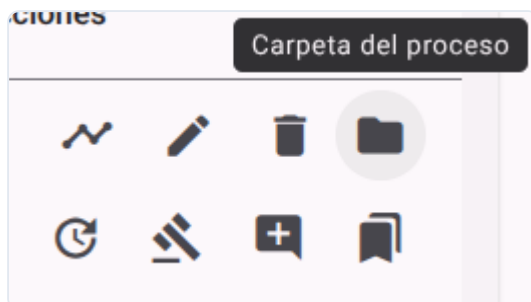


- **Link from the court:** Links the internal registry of the platform with the database of the official entity of origin of the court to maintain traceability.

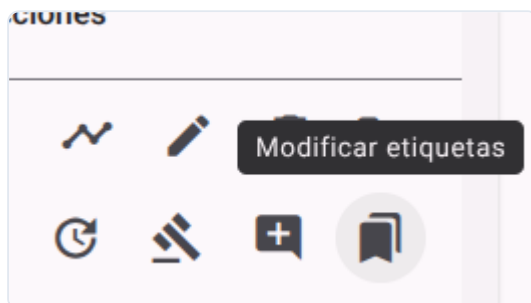


Documentation and Metadata

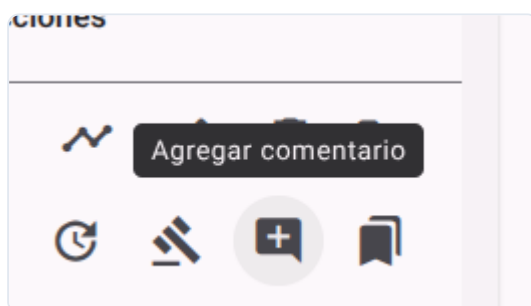
- **Process folder:** Open the digital folder and file attachment manager to view or upload records, memorials and evidence.



- **Modify labels:** Opens the classification palette to assign or edit chromatic labels that identify the priority or area of the case.

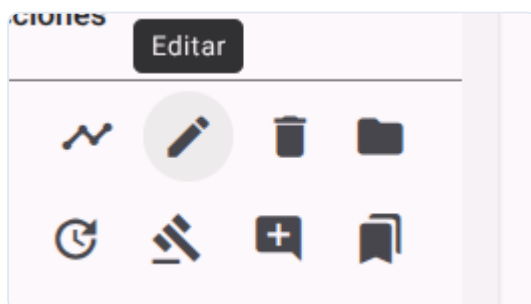


- **Add comment:** Allows you to write observations or internal notes that are recorded in the file log.



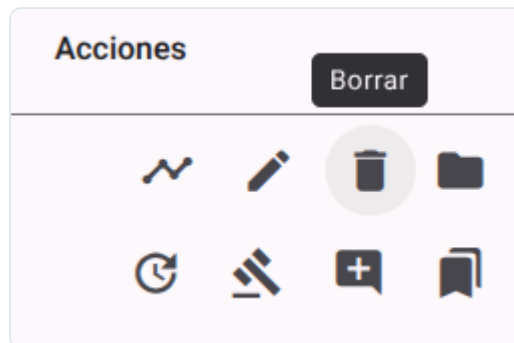
Administration

- **Edit:** Modifies the basic information uploaded to the file (parties, court, etc.).



Actualizar

- **Delete:** Permanently deletes the process from the organization tray.



Confirmación de eliminación

¿Está seguro que desea eliminar el proceso 111111111111?

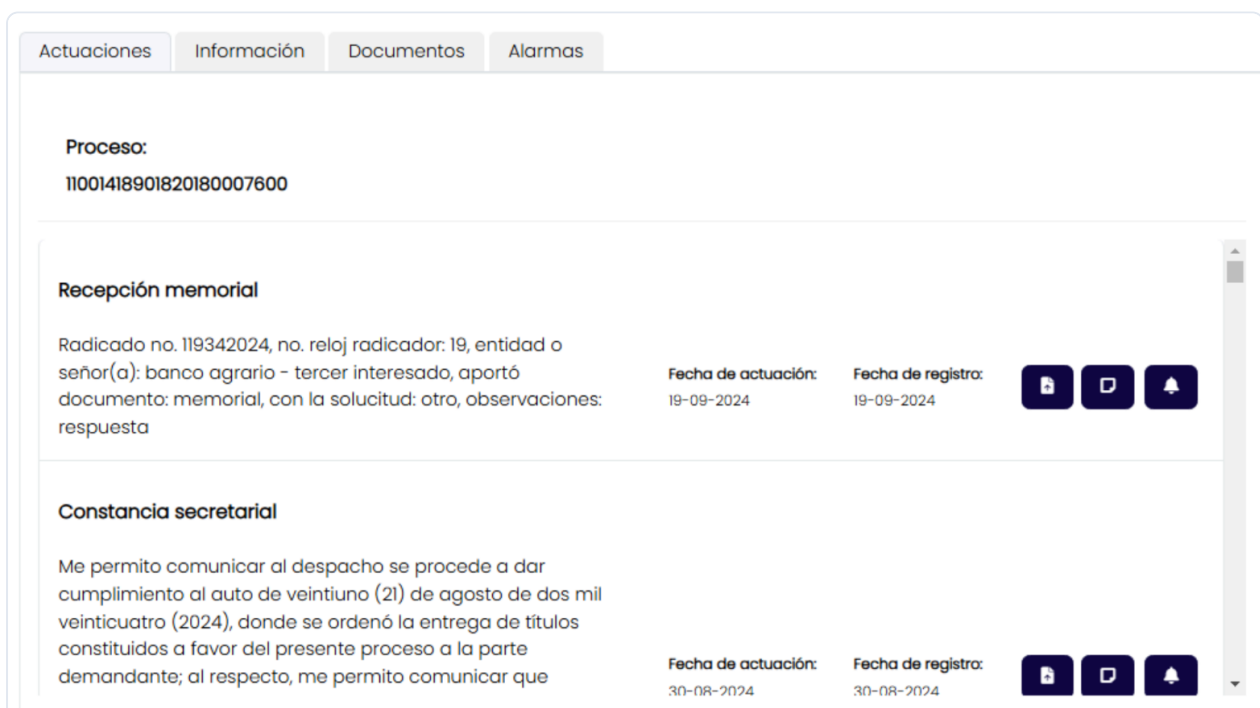
Eliminar

Cancelar

##5. Tabs: When you click on any process, a view with different tabs will open:

Tab 1: Performances

Shows the chronological list of registered movements.



- **Add Performance:** Click this button to open the registration window and enter:
 - *Date:* Day on which the performance takes place.
 - *Action:* The type of providence or movement (e.g. *Auto decrees tests*).
 - *Annotation:* Detailed summary of the contents of the order or memorial.
 - Click **Save**. The record will be added immediately and notification will be scheduled for the next day.

Actuaciones Información Documentos Alarmas

Proceso:
68001310500620220017302

Agregar actuación

No hay actuaciones

- **Action Actions:** To the right of each action in the list there are shortcuts to: upload support documents, add additional annotations, configure specific alarms or delete the action.

Actuaciones Información Documentos Alarmas

Proceso:
68001310500620220017302

Agregar actuación

Devolución Juzgado Origen

Fecha Salida:04/11/2020,Oficio:1923 Enviado a: - 011 - Civil - Circuito - Bogotá D.C.

Fecha de actuación: 23-09-2024 Fecha de registro: 23-09-2024

Icons: Document upload, Annotation, Alarm, Delete

Add Documents: Selecting this option will open an additional window allowing you to add and link a document to the performance. To do so, click **Select File**, choose the file you want to attach and then press the **Save** button to complete the process.

Agregar documento al proceso

Archivo

Seleccionar archivo

Ningún ar...leccionado

✓ Guardar

✕ Cancelar

Add a note: This option will allow you to add notes to performances. Once you click on the button, the following window will appear:

Proceso:

15176400300120200002710

Agregar nota

Actuacion:

Auto Prueba

Buscar

Mostrar 5 elementos

«« « » »»

NOTA	FECHA	ACCIONES
Todavía no se han agregado registros		

Mostrar 5 elementos

«« « » »»

Now, click on the **Add Note** button and a new window will appear:

Agregar nota

Nota

Escriba sus comentarios

✓ Guardar

✕ Cancelar

Write the text of the note and then click save.

Add documents: Selecting this option will open an additional window allowing you to add and link a document to the performance.

Agregar documento al proceso



Archivo

Seleccionar archivo

Ningún archivo seleccionado

✓ Guardar

✕ Cancelar

Add a note: This option will allow you to add notes to performances. Once you click on the button, the following window will appear:

Proceso:

15176400300120200002710

Agregar nota

Actuacion:

Auto Prueba

Buscar

Mostrar

5

elementos

««

«

»

»»

NOTA	FECHA	ACCIONES
Todavía no se han agregado registros		

Mostrar

5

elementos

««

«

»

»»

Now, click on the **Add Note** button and a new window will appear:

Agregar nota

Nota

Escriba sus comentarios

✓ Guardar

X Cancelar

Write the text of the note and then click save.

Add alarm: By clicking on this option, a new window will appear in which you can add alarms to the actions:

Agregar alarma

x

Fecha

Fecha

Hora (Formato 24 hrs.)

HH

:

MM

Tipo

Ingresa el tipo

✓ Guardar

x Cancelar

Fill in the date, time and choose the type of alarm you want to link

Delete Performance: This option will allow you to delete the action created, which will also delete the documents, notes and/or alarms linked to it:

Confirmación de eliminación

¿Estas seguro que deseas eliminar la actuación **Auto Prueba** ?

Eliminar

Cancelar

By selecting this option, a window will open where you must click on the "Delete" button to confirm the deletion of the performance.

Tab 2: Information

View the general file of the filing: Names of the parties (Plaintiff/Defendant), Court or Office of origin, current procedural stage and date of original filing of the litigation.

ActuacionesInformaciónDocumentosAlarmas

Proceso:
11001310503820200029700

SIGUIENTE EVENTO
Sin eventos siguientes

ULTIMO EVENTO
09-10-2024

DESPACHO
Juzgado 038 laboral de bogotá

PONENTE

TIPO
Declarativo

CLASE
Ordinario

RECURSO
Sin Tipo de Recurso

UBICACIÓN DEL ARCHIVO
Archivo

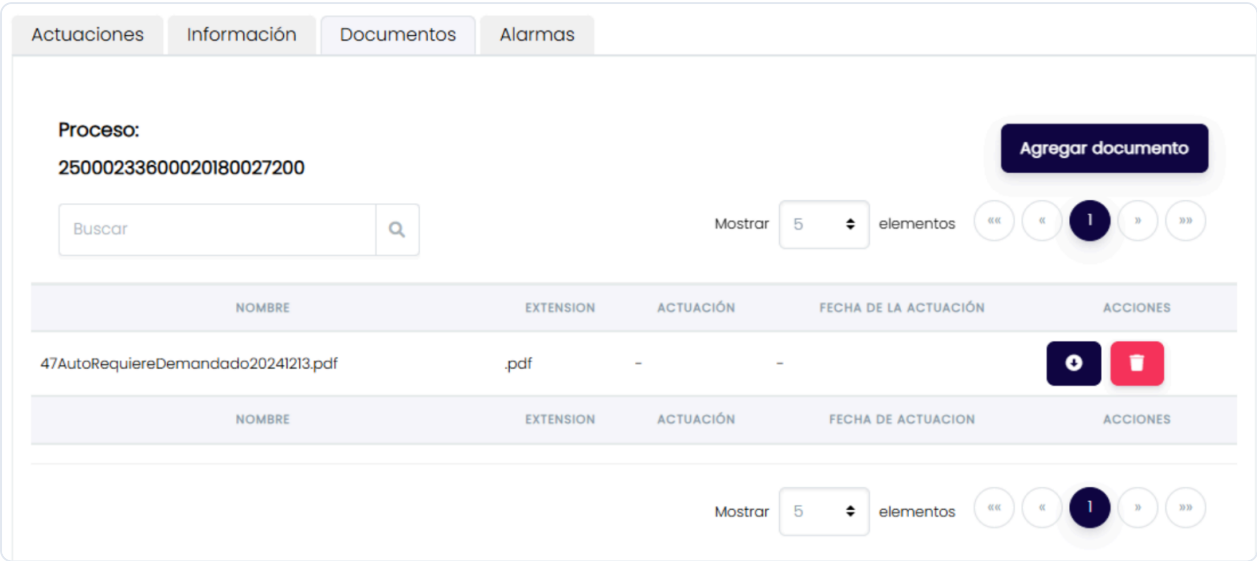
DEMANDANTE(s) / ACCIONANTE(s)
Positiva compañía de seguros s.a

DEMANDANDADO(s) / ACCIONADO(S)
Compañía de seguros bolivar s.a arl.

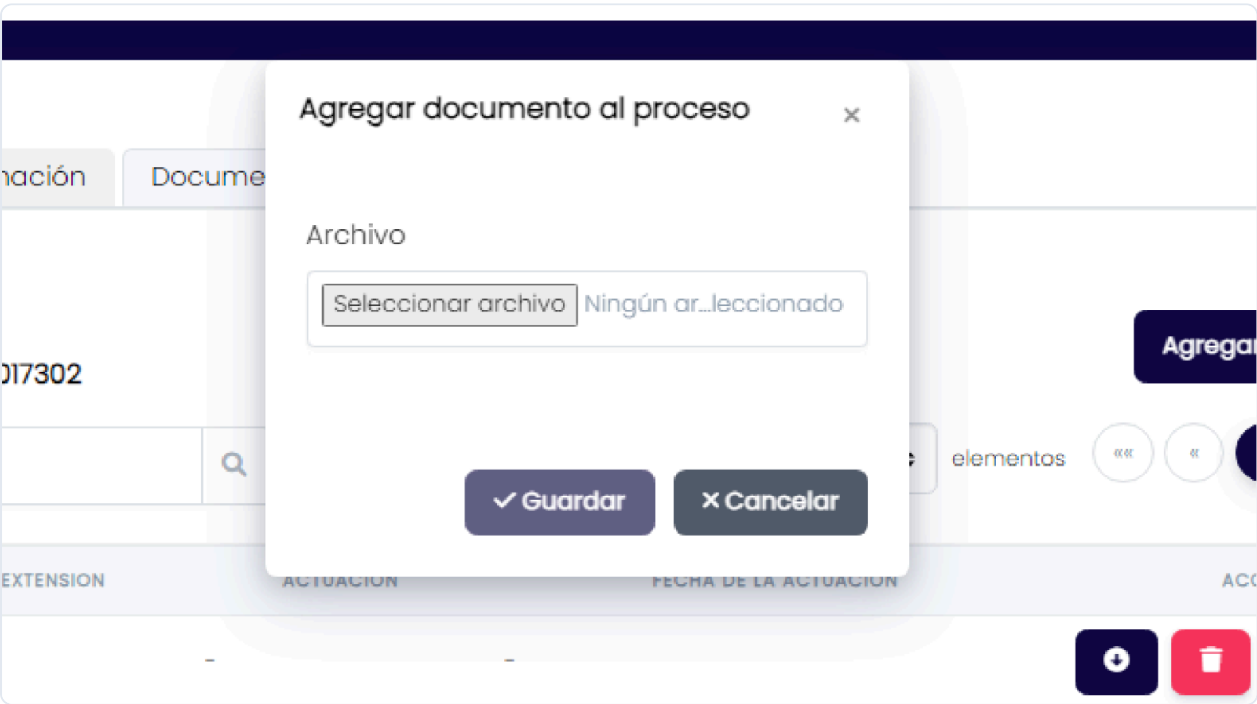
CONTENIDO
Seguridad social recobros

Tab 3: Documents

Section to store memorials, writs and documentary evidence in PDF or image:



- 1. Click **"Add Document"**.
- 2. Press **"Select a file"** to open your computer's file explorer and choose the document medium.
- 3. Click **"Save"**. The system will upload the file and display the alert *"The document has been added successfully"*.



- 4. After clicking on the "Select a file" button and it will automatically open your computer's file explorer, browse your folder directory, select the file you want to upload and click "Open", and once the file is selected, click **Save**. A notification will appear on the right side of the screen indicating that "The document has been added successfully" and will be available for viewing within the process documents, for the example, a file called QR.png was uploaded.

Actuaciones

Información

Documentos

Alarmas

Proceso:

68001310500620220017302

Buscar

Mostrar

5

elementos

1

Agregar documento

NOMBRE	EXTENSION	ACTUACIÓN	FECHA DE LA ACTUACIÓN	ACCIONES
QR.png	.png	-	-	
QR.png	.png	-	-	

Mostrar

5

elementos

1

If you wish to view or delete the document, use the options available below.

Download: This option will allow you to download the file in question.

Delete: This option will allow you to delete the file in question.

Tab 4: Alarms

Shows the temporary alerts created for the actions of this specific process, facilitating the control of terms by the team assigned to the case.

Actuaciones

Información

Documentos

Alarmas

Proceso:

68001310500620220017302

Buscar

Mostrar

5

elementos

1

ACTUACIÓN	ALARMA	ESTADO	TIPO	ACCIONES
Devolución Juzgado Origen	08-01-2025 12:00	Programado	Citación	

Mostrar

5

elementos

1

Roles and Permissions Required

Access to the My Processes console and its folders by source is governed by the following security permissions:

- **Visualization and Consultation:**
 - `processes_read` / `my_processes_read` : Allows read access to the files tray and its folders in the left panel (CPNU, TYBA, SAMAI, Microsites, SIUGJ, SIPI).
 - `process_comments_read` and `process_tasks_read` : Enable the display of the history of comments, tasks and action history in the actions column.
- **Operational Management (Writing):**
 - `my_processes_create` / `my_processes_update` : Grant authorization to create new files (green button *Create Process*), link court cases, modify labels and add follow-up comments.
- **Elimination:**
 - `my_processes_delete` : Allows you to permanently delete records from the platform.

Task Management of Judicial Processes

Description, Purpose and Objective

NOTE: The **Process Tasks** view is the central console for operational monitoring of the legal area. Its purpose is to allow lawyers, directors and assistants the consultation, assignment, status control and centralized export of all pending or milestones associated with the different judicial files registered on the platform.

The objective of this module is to avoid the expiration of terms and optimize the distribution of workloads within the legal team, guaranteeing that each file has a clear work plan, compliance dates and explicitly assigned managers.

Context of Use

This module is used on a daily basis to:

- Supervise the firm's legal pending list.
- Monitor the progress of tasks in high priority litigation.
- Audit compliance with procedural terms and export management reports for legal committees.

Step by Step for Module Operation

1. Task Query and Filtering

To locate and structure the display of assigned tasks in the main table:

1. **Search Tasks:** Go to the **Search** input bar. Enter keywords such as the process filing number, the name or description of the task, or the user responsible for its execution. The table will filter the rows in real time.
2. **Sort the list:** You can organize the records by directly clicking on the header of any of the following columns:
 - **Process:** Sort alphabetically by file reference.
 - **Task:** Organize according to the title or description of the task.
 - **Assigned to:** Classifies tasks by the name of the assigned professional.
 - **Completed:** Groups by progress status (open vs. completed tasks).
 - **Registration date:** Order chronologically (creation of the task).

2. Log Export

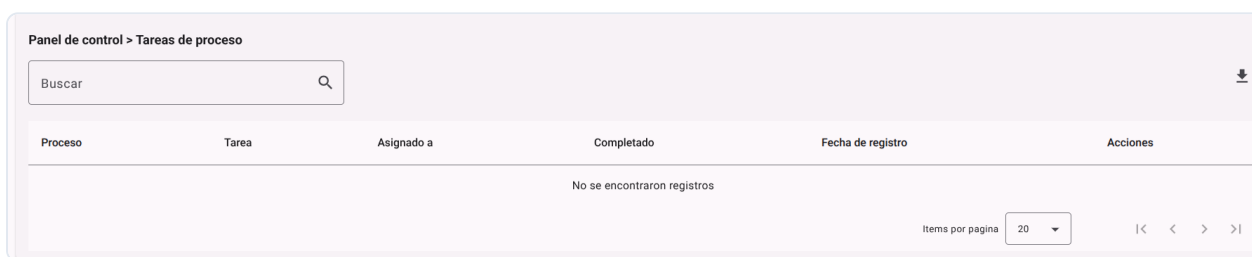
The system allows you to locally download the database of registered tasks:

1. Click the **download icon** (CSV format) located in the upper right corner of the screen.
2. The platform will extract the loaded list with the corresponding metadata (case reference, task details, completion status, responsible person and registration date) and immediately save the CSV report to your computer.

3. Individual Management (Actions Column)

Each task in the table has information and interaction options in the **Actions** column:

- **Completed:** Displays the task status (**Yes / No**). The update and progress tracking is managed within the respective case record workflow.
- **View details / Modify:** View details of the task and its assignment.
- **Delete:** Performs a logical deletion of the task record in the system (retaining record traceability).



Roles and Permissions Required

Access to the task console and modification of process tasks is regulated under the following security scheme:

- **Reading and Consultation:**
 - `process_tasks_read` : Allows entry to the `/legal/tasks` console and visualization of the tasks table.
- **Export:**
 - `process_tasks_export` : Authorizes downloading the tasks CSV report.
- **Creation and Update:**
 - `process_tasks_create` / `process_tasks_update` : Authorizes the registration of tasks in the lateral form of the file, reassignment of responsible professionals and updating records.
- **Elimination:**
 - `process_tasks_delete` : Enables the option to perform logical deletion of a task record.