



SOFTWARE FACTORY

PEEC

External Quality Assessment Program for clinical laboratories.

Official User Manual

zymDev Core Platform v5.5.2

Issue Date: 2026-09-13

Table of Contents

Release Notes & Changelogs (General)	Memberships & Licenses (Modulos Generales)
Constants & Enums (General)	System Menus & Navigation (Modulos Generales)
Event Enrollment (General)	Organizations (Modulos Generales)
Contact Information (General)	Countries & States (Modulos Generales)
Default Options (General)	System Products (Modulos Generales)
Audit Log (Herramientas del Sistema)	System References (Modulos Generales)
Incidents & Support (Herramientas del Sistema)	Roles & Permissions (Modulos Generales)
Communication Templates (Herramientas del Sistema)	User Management (Modulos Generales)
Maintenance Scripts (Herramientas del Sistema)	Certifications & Official Documents (Panel de control)
Partnerships & Alliances (Modulos CMS)	Event Documents (Panel de control)
Consumers & Success Stories (Modulos CMS)	Events & Evaluation Rounds (Panel de control)
FAQs (Modulos CMS)	Molecular Biology Results Entry (Panel de control)
Contact Information (CMS) (Modulos CMS)	Chemistry & Hormones Results Entry (Panel de control)
About Us (Modulos CMS)	Urinalysis Results Entry (Panel de control)
Digital Products (CMS) (Modulos CMS)	Enrollments & Registrations (Panel de control)
Published Services (CMS) (Modulos CMS)	Dynamic Questions & Forms (Panel de control)
System Attributes (Modulos Generales)	Reports & Certificates (Panel de control)
Tag Management (Modulos Generales)	Result Entry & Registration (Registro de datos)
System Languages (Modulos Generales)	

 **Download:** [Download User Manual in PDF](#)

Available Modules & Functionalities

Below are the modules and views available in **PEEC**:

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
Event Enrollment	-	The Event Enrollment (or Dynamic Enrollment) view is the module of the proficiency testing program responsible for predefining the...	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

View	Submodule	Description	Link
Incidents & Support	-	The Incident Management view is the centralized module for recording, reporting and tracking incidents, errors or requests for new...	Open Manual
Maintenance Scripts	-	The Script Console is an advanced level maintenance and support tool within the ERP, designed for the controlled execution of sche...	Open Manual

CMS Modules

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

General Modules

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

Control Panel

View	Submodule	Description	Link
Certifications & Official Documents	-	The Certifications and Official Documents view is the centralized module where the instructional documents of the events are consu...	Open Manual
Chemistry & Hormones Results Entry	Formularios	The Chemistry and Hormones Results Entry console is the platform's unified interface designed to capture, plot and record technica...	Open Manual
Dynamic Questions & Forms	-	The Questions and Dynamic Form view is the administrative tool for configuring, creating and managing the question bank for forms,...	Open Manual
Enrollments & Registrations	-	The Registration and Registration view is the administrative console where the complete process of consulting, registering, managi...	Open Manual
Event Documents	-	The Event Documents view is the query console responsible for allowing you to explore, filter and sort the complete catalog of doc...	Open Manual
Events & Evaluation Rounds	-	The Events and Evaluation Rounds view is the administrative console in charge of the comprehensive administration of events (creat...	Open Manual
Molecular Biology Results Entry	Formularios	The Molecular Biology Results Entry console is the specialized interface of the PEEC platform designed to record methodological da...	Open Manual
Reports & Certificates	-	The Download Reports and Certificates view is the final module of the proficiency testing and external quality control (PEEC) prog...	Open Manual
Urinalysis Results Entry	Formularios	The Urinalysis Results Entry console is the specialized interface designed to collect and record in a structured way the physical,...	Open Manual

Data Entry

View	Submodule	Description	Link
Result Entry & Registration	-	The Results Registration and Entry suite is the daily operational core of the quality area on the Quattrol platform. Its purpose i...	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.

Event Enrollment and Response Configuration

Description, Purpose and Objective

NOTE: The **Event Enrollment** (or Dynamic Enrollment) view is the module of the proficiency testing program responsible for predefining the methodological configuration (assays, instruments and batches) that a participant will use during an annual evaluation cycle.

Enrollment represents a participant's predefined response template. It allows the user to configure fixed technical variables in advance to avoid having to select them again in each round of results entry. It has three fast charging options:

- **Copy enrollment from previous event:** Duplicates the configuration of instruments, reagents and methods from the previous annual cycle.
- **Copy enrollment from previous response:** Duplicates the values reported in the immediately previous evaluation round.
- **Manual typing:** Allows you to register zero data in the dynamic form fields.

The objective of this view is to streamline the proficiency testing reporting process (PEEC), reducing typing errors by participating organizations and guaranteeing the homogeneity of the data throughout the year.

Context of Use

This module is used at the beginning of each annual cycle or evaluation round by:

- **Users of participating organizations:** To configure the methodologies and active analyzers at your headquarters before reporting the first control of the year.
- **Platform Administrators:** To assist organizations by cloning previous configurations before renewals of participation contracts.

Possible Actions

1. Start Enrollment by Participant

1. Enter the module and search in the autocomplete selector for the **Participant Number** assigned to your organization.
2. Upon selecting the participant, the system will load the dynamically structured form for the active event in the background.

[Imagen ilustrativa: Selector de Participante para Enrolamiento]

2. Quick Cloning of Settings (History)

If the participant has a history of participation on the platform, the system will enable two accelerated preload buttons at the top:

- **Copy enrollment from previous event:** Click this button if you maintain the same analyzer equipment and reagent brands from the previous year. The dynamic form fields will be filled immediately.
- **Copy enrollment from previous answer:** Click to load the methods and instruments used in the immediately previous round within the same year.

[Imagen ilustrativa: Botones de Copiado Rápido de Historial]

3. Fill out the Dynamic Methodology Form

If you choose manual typing or require specific changes:

1. Go through the sections of the form (e.g. *Uroanalysis Section, Hematology, Clinical Chemistry*).
2. For each analyte or test in the event, define the report configuration:
 - **Instrument:** Select the analyzer on which you process the sample.
 - **Method:** Indicate the analytical technique.
 - **Lot:** Record the corresponding reagent lot number.
3. The system will dynamically validate that the selected method/instrument combination is compatible with the master catalog.

[Imagen ilustrativa: Formulario Dinámico de Métodos y Reactivos]

4. Save Enrollment

Once all sections of the dynamic form have valid combinations, the **"Save"** button in the footer will be enabled. Click on it to store the enrollment template.

Required Technical Permits

Access to the annual event registration settings requires:

- `dynamic_enrollment_read` : Allows access to the view and selection of the participant.

- `dynamic_enrollment_create` or `dynamic_enrollment_update` : Enables the action of copying previous configurations (previous event/response), filling out the form and saving the organization's enrollment.

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.

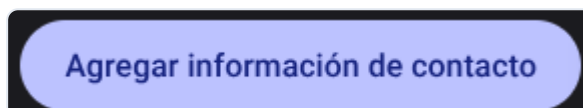
CMS > Informaciones de Contacto

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

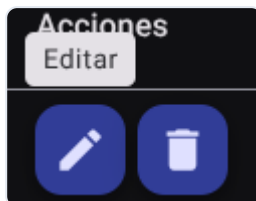
Cancelar

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

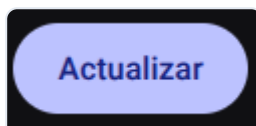


3. Edit a Contact Channel

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

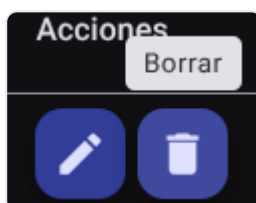


2. Modify the desired fields and save the changes to the **Save** button.

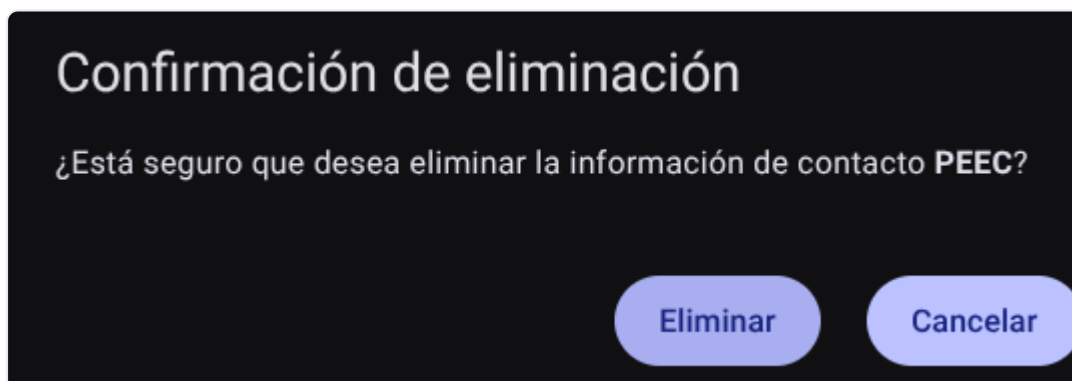


4. Delete a Contact Channel

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

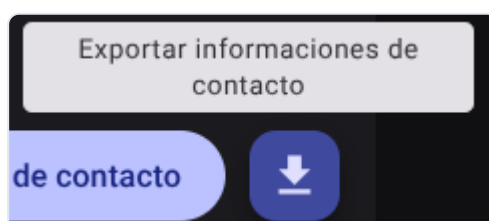


2. Confirm the action.



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:

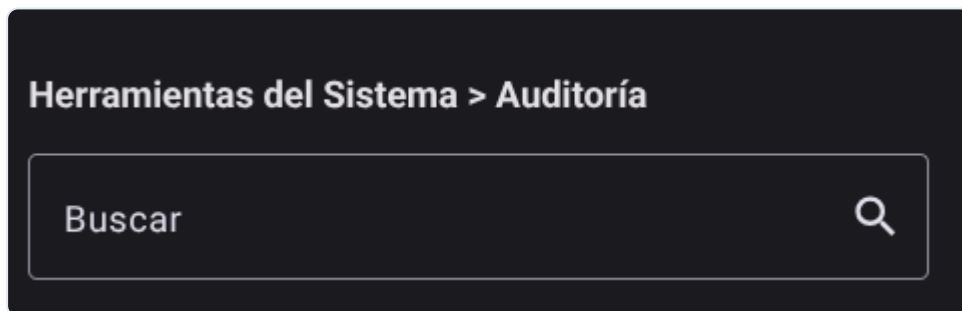
- **Visual Indicator:** A colored icon that summarizes the category of the operation:
 - **Green:** Creation of a new element.
 - **Blue:** Modification of an existing record.
 - **Red:** Deletion of system information.
- **Date:** Exact timestamp (day, month, year and hour) when the action was executed.
- **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": "FoAgYtFMwKBNx7IUSP", "project": "EL3yJUI3jU0IOMzdTh0e", "role": "6r0MLFJ73ypGEF0zR0Z", "status": "ACTIVE", "created_date": "2026-08-22T22:17:57.665Z" }	
Aug 21, 2026, 7:28:47 PM	Creó etiqueta prueba en el menú /tags	{}	{ "deleted": false, "name": "etiqueta prueba", "description": "etiqueta prueba", "color": "#243aa8", "created_date": "2026-08-22T00:28:46.973Z", "id": "426f6ab7-ce73-471c-8433-6849563ae86b" }	

2. Search Specific Events

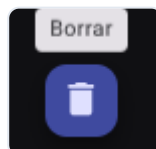
In the top bar, enter any term (such as the name of a menu, the name of a user, or a particular action). The table will update in real time showing only the records that match the search.



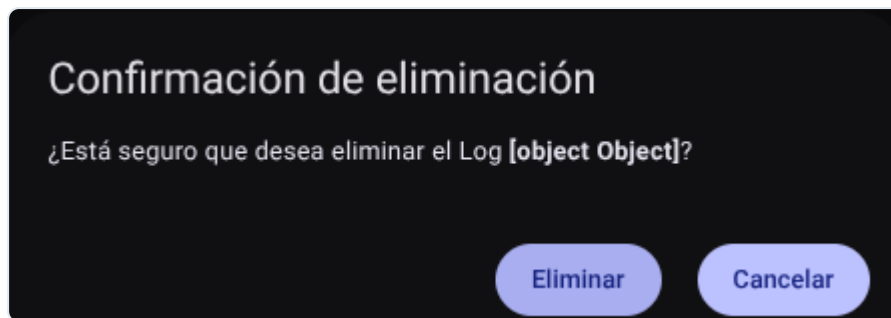
3. Delete a Log Record (If applicable)

If the administrator user has advanced log debugging permissions:

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



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



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

Required Technical Permits

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

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

Incident Management and Technical Support

Description, Purpose and Objective

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

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

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

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

Context of Use

This module is used by:

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

Possible Actions

1. Consult and Filter Incidents

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

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

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

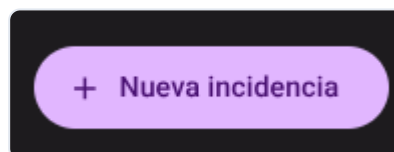
Tipo: Todos Estado: Abierto

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

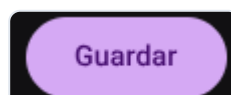
Opcional pero muy útil para reproducir el error.

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.

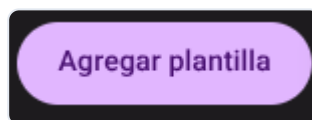
Herramientas del Sistema > Plantillas						
Buscar Q				Agregar plantilla 		
Nombre	Título	¿Tiene parámetros?	Canal	Cuerpo	Fecha de registro	Acciones
welcome_quattrol_template	Bienvenido a Quattrol365	Si	SMTP	Estimado usuario Labcare de Colombia le da la bienvenida a Quattrol365. A continuación relacionamos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

Items por pagina 20 Mostrando 1 - 5 de 5

2. Add a New Template

To design and incorporate a new template into the system:

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



2. Fill out the form with the required fields:

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

Nombre* welcome_quattrol_template	Titulo* Bienvenido a Quattrol365
Canal * SMTP	☒ ¿Tiene parametros?
Cuerpo* <pre><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</pre>	

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

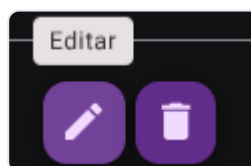
3. Click **"Add"** to register the template.



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

Canal *

SMTP

Titulo*

Bienvenido a Quattrol365

☒ ¿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 %>

Previa

Estimado usuario

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

Nombre de la institución: <%= orgName %>

Correo electrónico registrado: <%= email %>

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

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

Actualizar

Cancelar

3. Use the interactive preview to validate your changes.

Previa

Estimado usuario

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

Nombre de la institución: <%= orgName %>

Correo electrónico registrado: <%= email %>

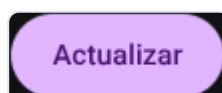
Ingrese [aquí](#) para asignar su contraseña.

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

Actualizar

Cancelar

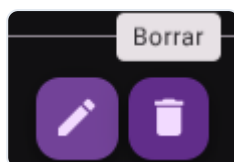
4. Click **"Update"** to apply the changes immediately to system notifications.



4. Delete a Template

To permanently delete a template:

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

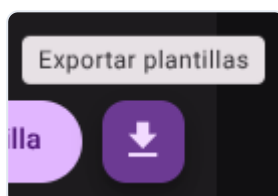


2. confirm the action in the popup modal.

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

5. Export Templates

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



Required Technical Permits

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

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

Repair Scripts Console

Description, Purpose and Objective

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

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

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

Context of Use

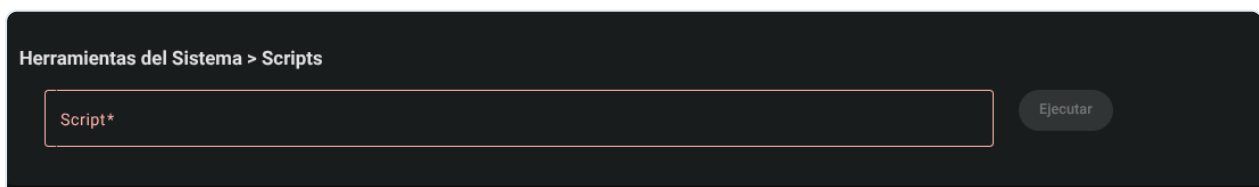
This advanced dashboard is restricted exclusively to Senior Support Engineers and Super Administrators to:

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

Possible Actions

1. Select a Script from the Gallery

The system has a catalog of predefined scripts.

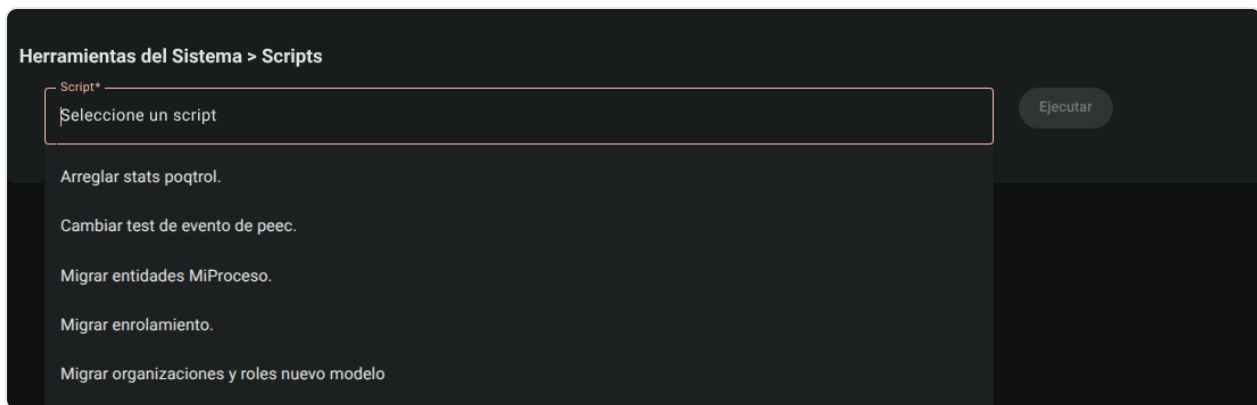


Herramientas del Sistema > Scripts

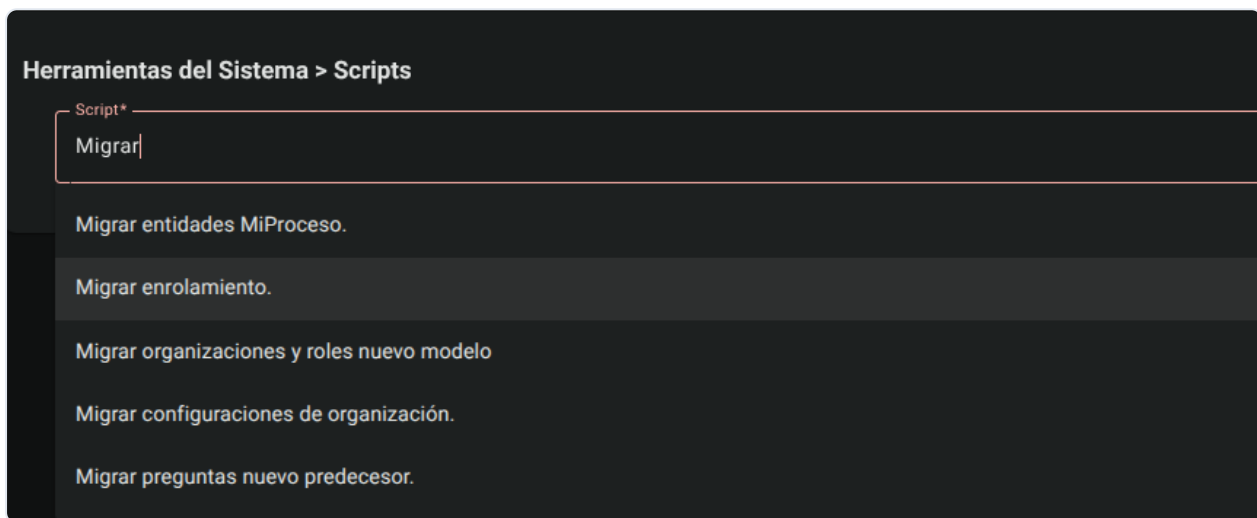
Script*

Ejecutar

1. Click the **Script** field.



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

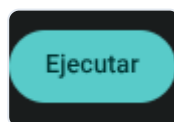


3. Select the required script.

2. Run Maintenance Script

Once the script is selected:

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



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

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

Roles and Permissions Required

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

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

Partnership and Alliance Management (CMS)

Description, Purpose and Objective

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

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

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

Context of Use

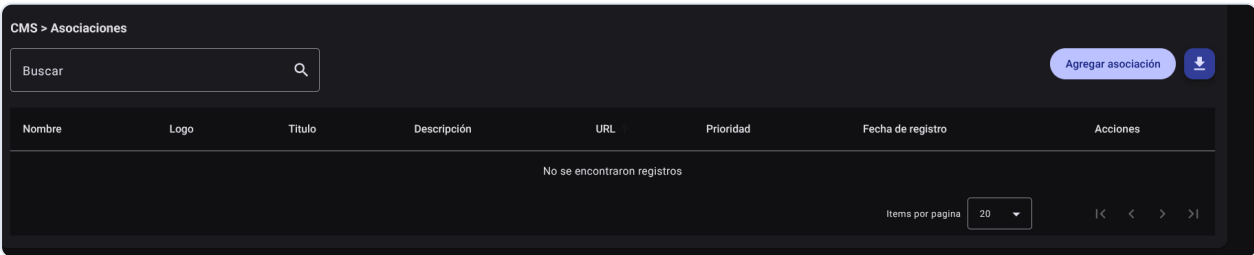
This module is used by:

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

Possible Actions

1. Consult the Catalog of Associations

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

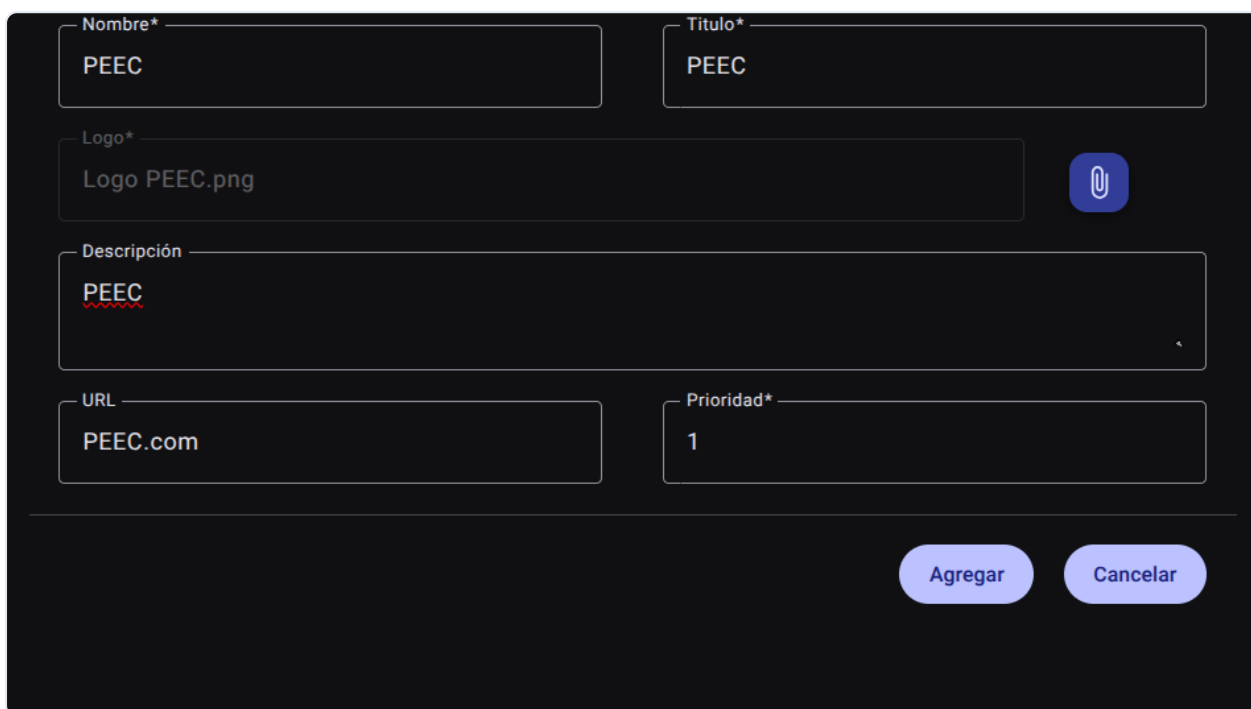


2. Register a New Association

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

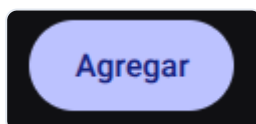
2. Complete the data in the drop-down side form:

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



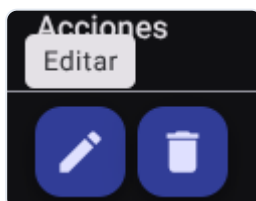
A form for adding a new ally association. It contains the following fields: 'Nombre*' with the value 'PEEC', 'Titulo*' with the value 'PEEC', 'Logo*' with the value 'Logo PEEC.png' and a file upload icon, 'Descripción' with the value 'PEEC', 'URL' with the value 'PEEC.com', and 'Prioridad*' with the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

3. Click "Add".

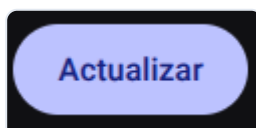


3. Edit or Delete an Association

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

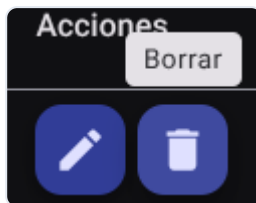


2. Modify the desired fields and save the changes to the **Save** button.

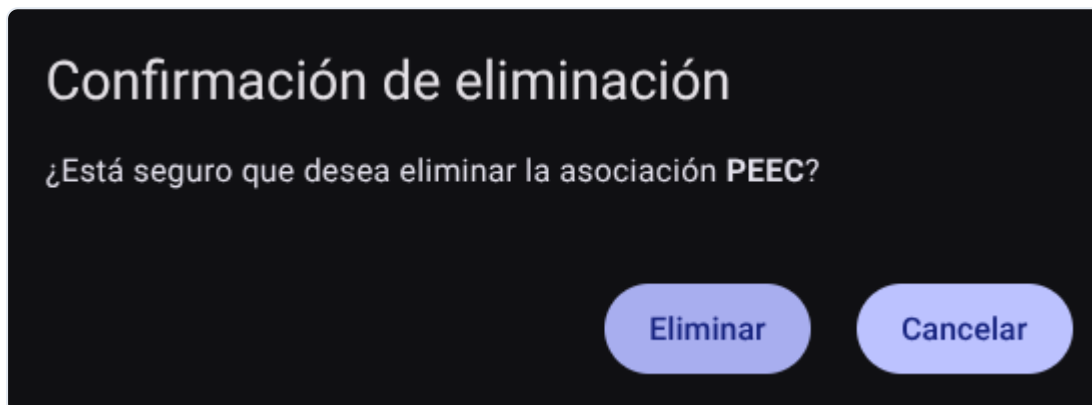


4. Delete an Association

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

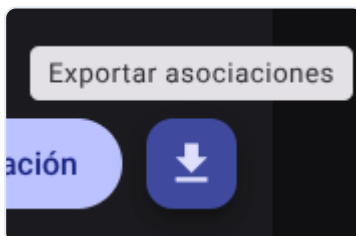


2. confirm the action.



5. Export the Association Catalog

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



Required Technical Permits

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

Consumer Management (CMS)

Description, Purpose and Objective

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

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

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

Context of Use

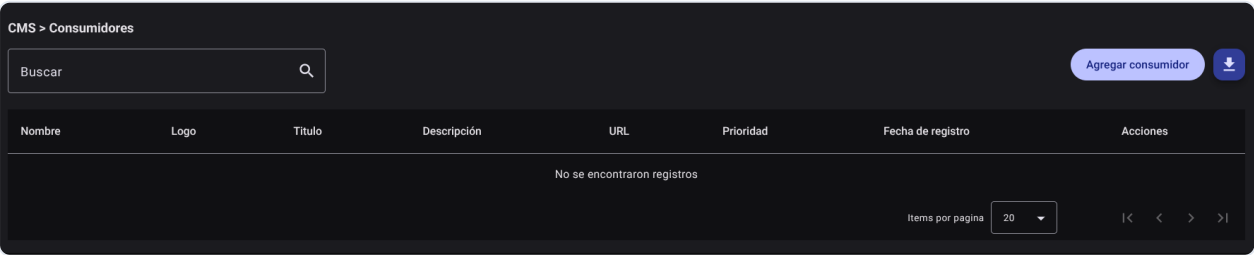
This module is used by:

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

Possible Actions

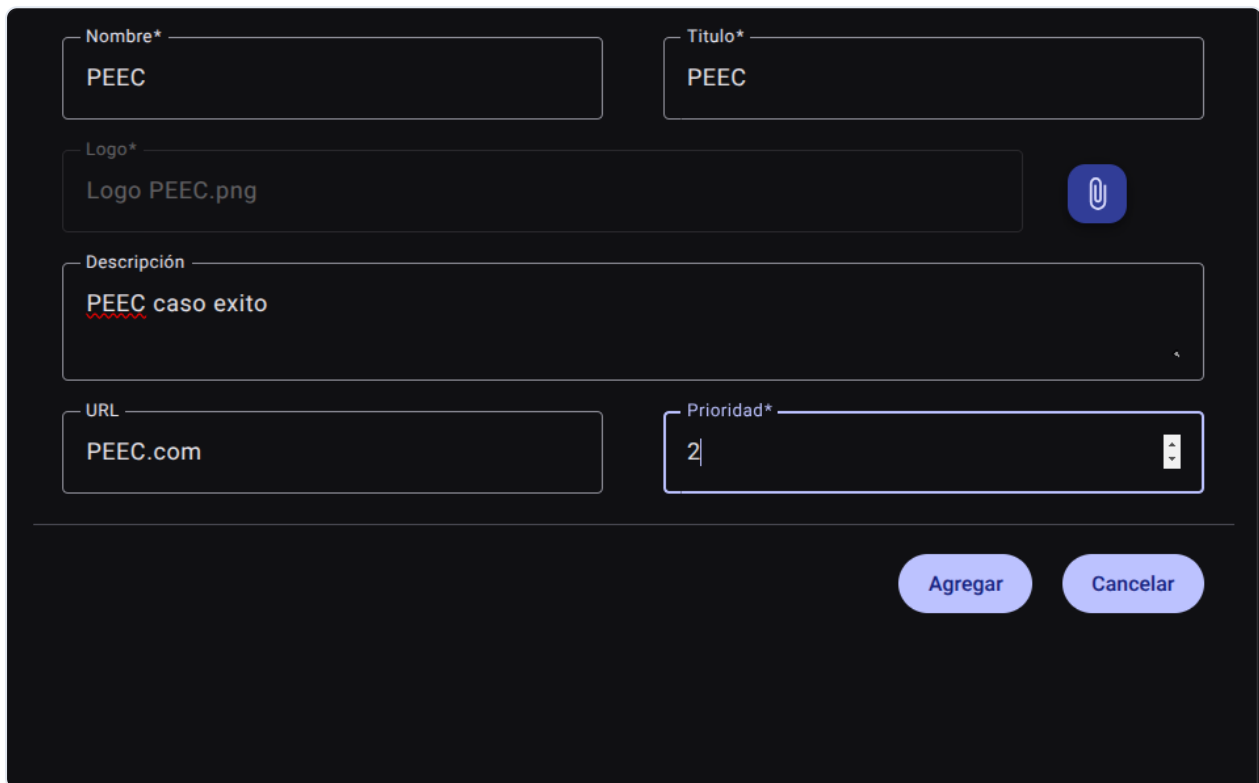
1. Consult the List of Consumers and Clients

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



2. Register a New Consumer or Client

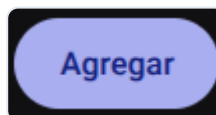
1. Click the **"Add Consumer"** button.
2. Fill in the requested information on the side panel:
 - **Name:** Company name or commercial name of the client.
 - **Title:** Descriptive heading or title of the reference.
 - **Logo (URL / File):** Official logo link or upload.
 - **Description:** Customer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



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

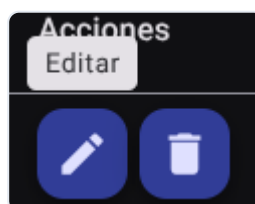
- Nombre***: Text input containing "PEEC".
- Titulo***: Text input containing "PEEC".
- Logo***: File upload area showing "Logo PEEC.png" and a blue paperclip icon.
- Descripción**: Text area containing "PEEC caso exito".
- URL**: Text input containing "PEEC.com".
- Prioridad***: Number input containing "2" with a dropdown arrow.
- Buttons**: "Agregar" (Add) and "Cancelar" (Cancel) buttons at the bottom right.

3. Click **"Add"**.

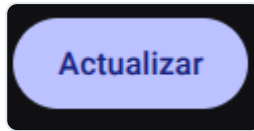


3. Edit or Delete a customer

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

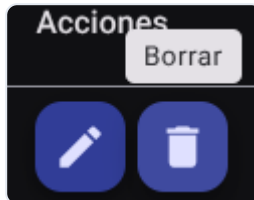


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a consumer

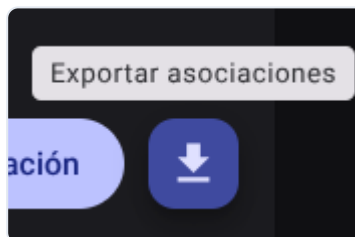
1. To unsubscribe a consumer, use the delete button (trash can icon ) in the actions column.



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

|<

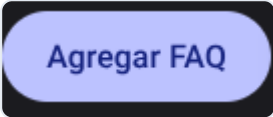
<

>

>|

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

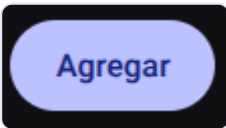
Respuesta*

Configuración completa

Agregar

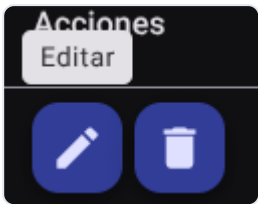
Cancelar

3. Click "Add".

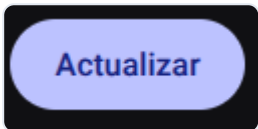


3. Edit an FAQ

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

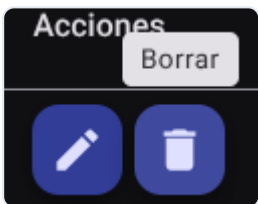


2. Modify the desired fields and save the changes to the **Save** button.

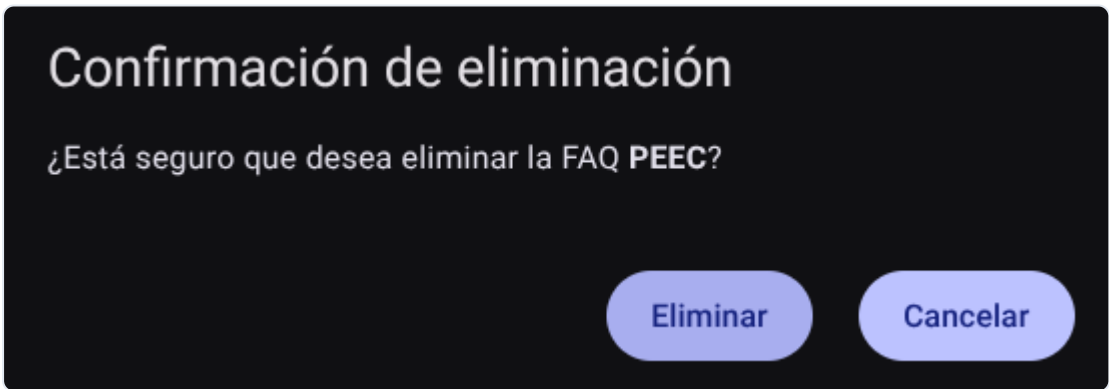


4. Delete an FAQ

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

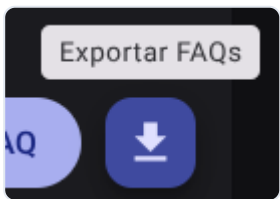


2. confirm the action.



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.

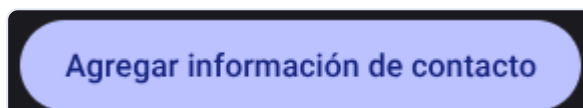
CMS > Informaciones de Contacto

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

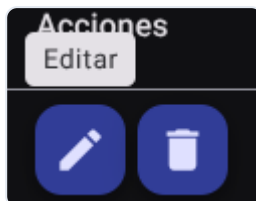
Cancelar

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

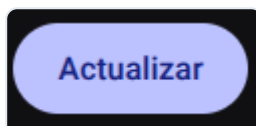


3. Edit a Contact Channel

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

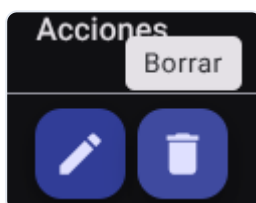


2. Modify the desired fields and save the changes to the **Save** button.

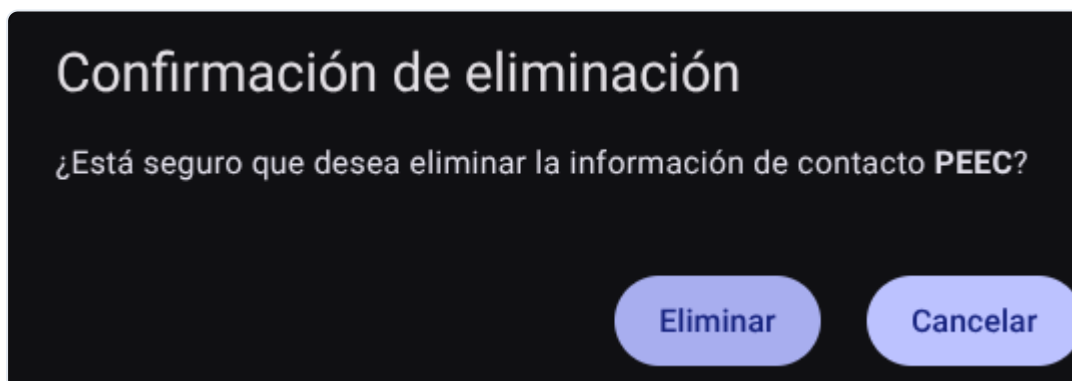


4. Delete a Contact Channel

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

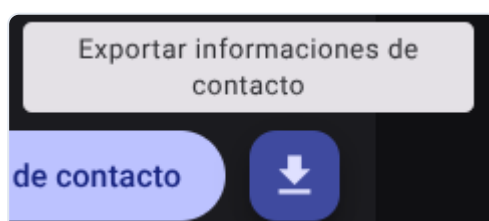


2. confirm the action.



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

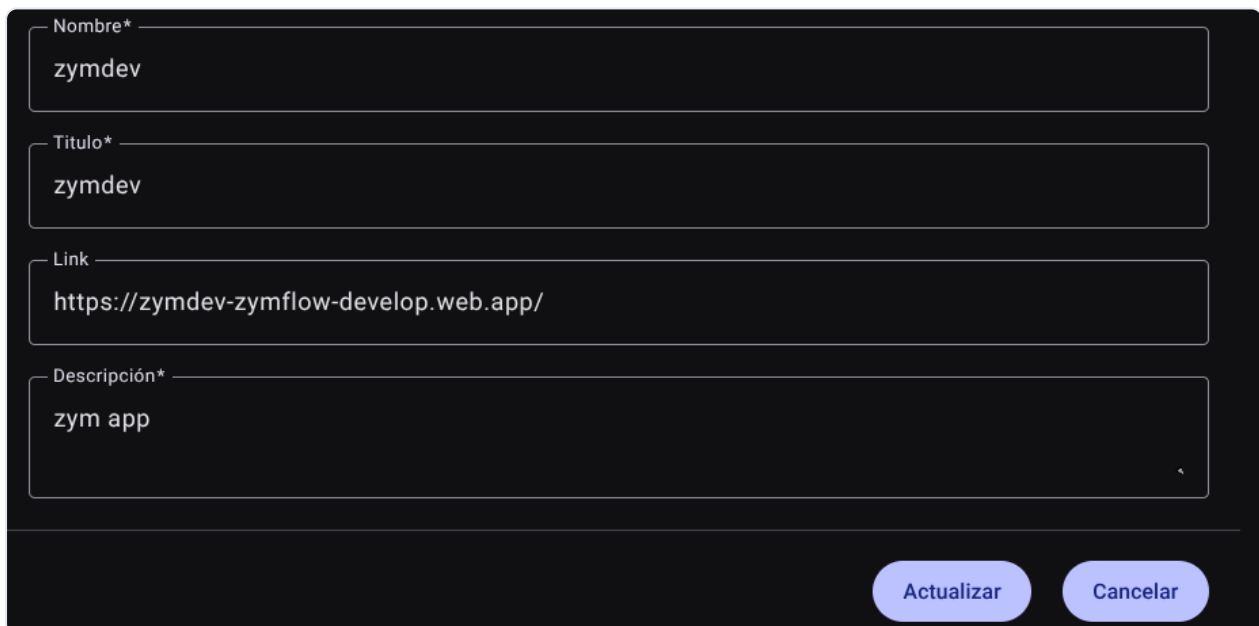
2. Modify Institutional Information

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

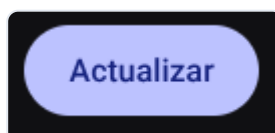
Titulo*
zymdev

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

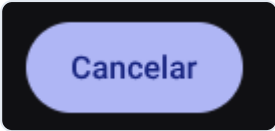
Descripción*
zym app

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.

Cancelar

Required Technical Permits

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

Digital Product Catalog (CMS)

Description, Purpose and Objective

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

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

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

Context of Use

This module is used by:

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

Possible Actions

1. Consult the Product Catalog

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

CMS > Productos

Buscar

Agregar producto

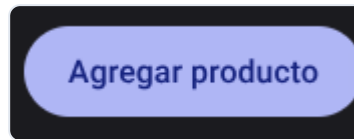
Nombre	Título	Icono	Descripción	URL	Video	Prioridad	Fecha de registro	Acciones
No se encontraron registros								

Items por página

20

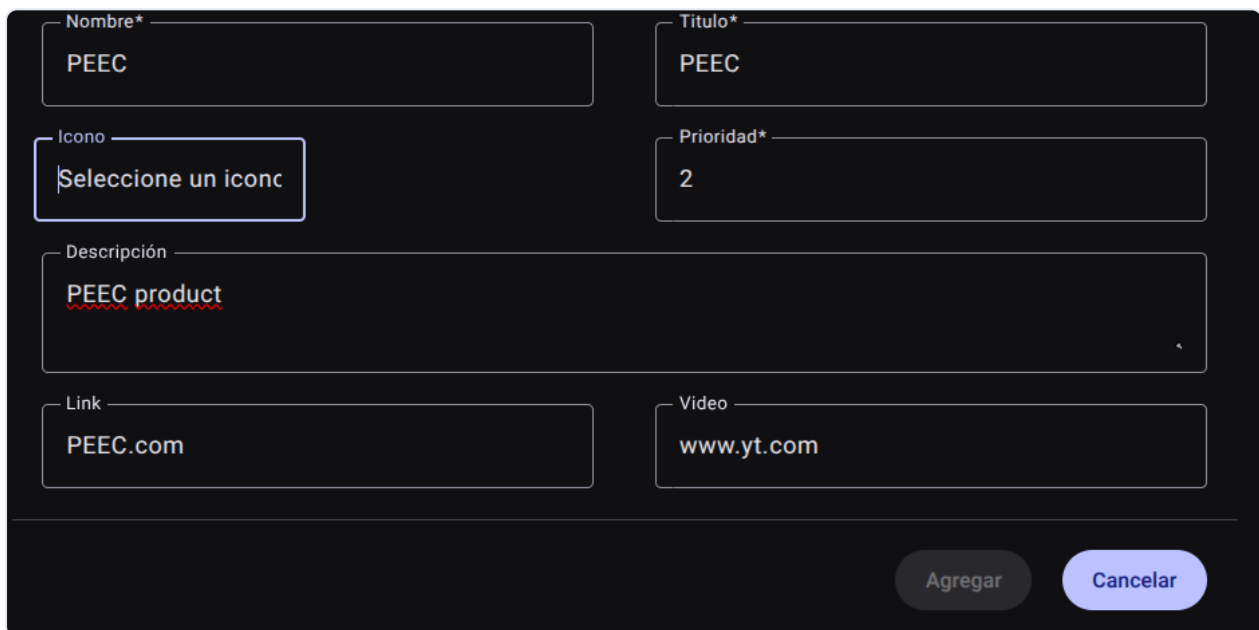
2. Register a New Digital Product

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



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

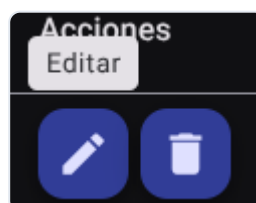
- **Name:** Commercial name of the digital product (e.g. Labcare Cloud, My Process, PEEC).
- **Title:** Slogan or main value proposition of the product.
- **Icon:** Icon identifier for the Material Icons library.
- **Description:** Detailed descriptive text with the modules and scope of the product.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



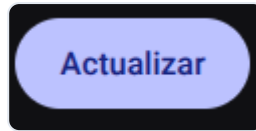
3. Click **"Add"**.

3. Edit a Product

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

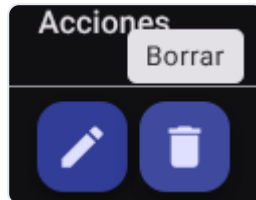


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a Product

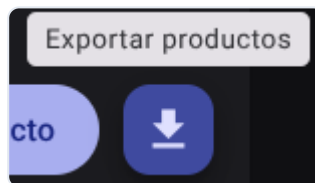
1. To delete a product, use the delete button (trash can icon ) in the actions column.



2. Confirm the action.

5. Export the Product Catalog

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



Required Technical Permits

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

Catalog of Published Services (CMS)

Description, Purpose and Objective

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

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

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

Context of Use

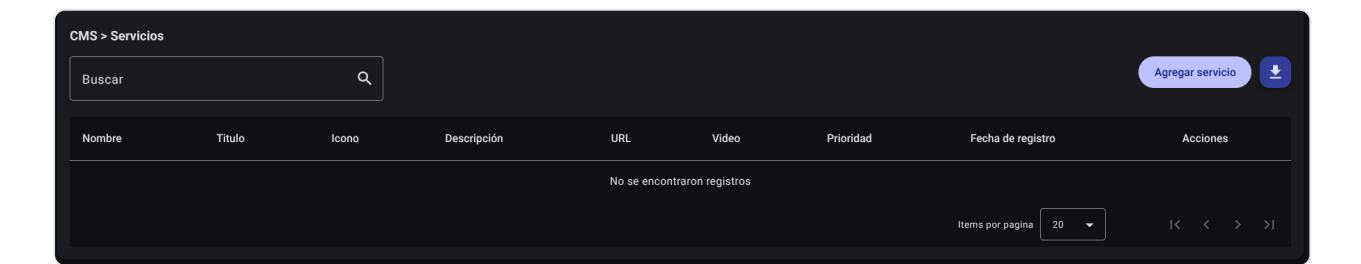
This module is used by:

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

Possible Actions

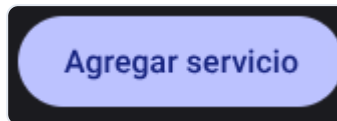
1. Consult the Service Catalog

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



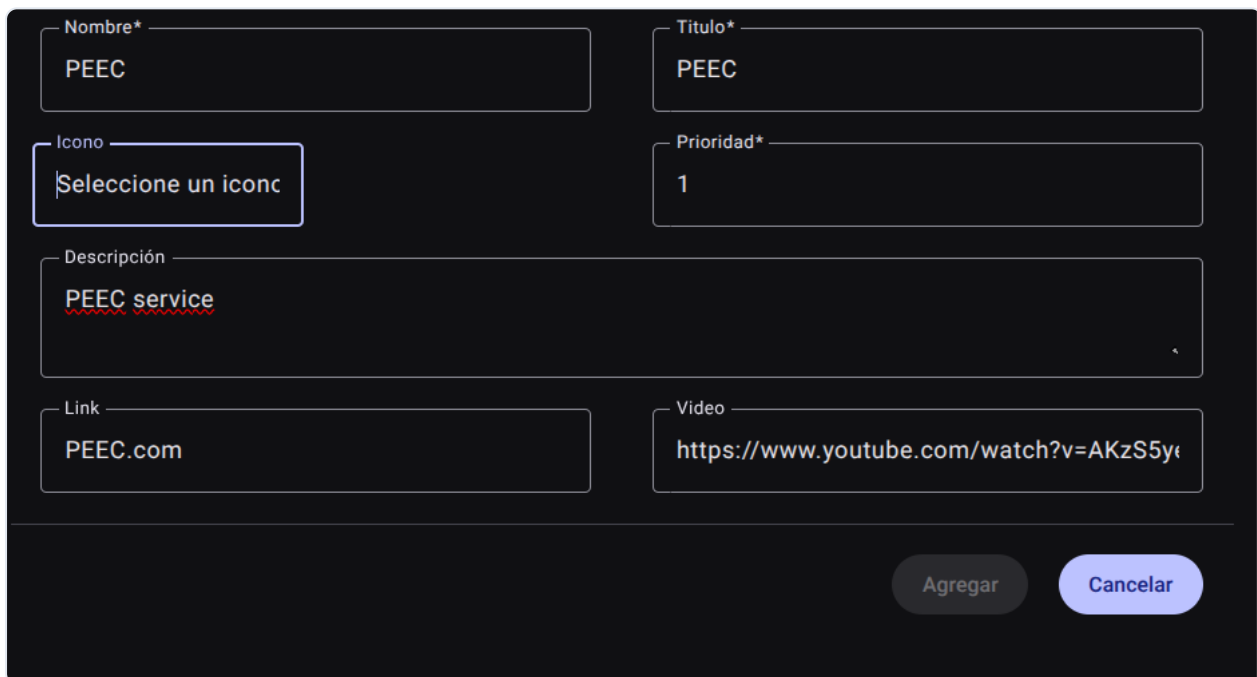
2. Register a New Service

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



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

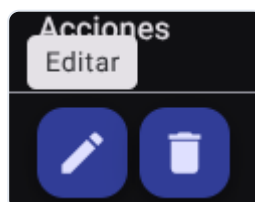
- **Name:** Service identifier name.
- **Title:** Slogan or short heading of the service.
- **Icon:** Name of the Material Icons icon for the cover.
- **Description:** Explanatory detail of the value proposition of the service.
- **URL:** Link to the detailed or service contracting page (optional).
-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



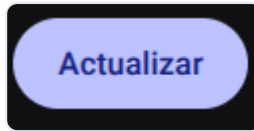
3. Save the changes using the **"Add"** button.

3. Edit a Service

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

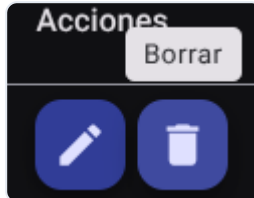


2. Modify the desired fields and save the changes with the **Actualizar** (Update) button.



4. Delete a Service

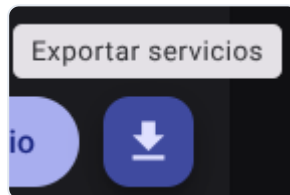
1. To delete a service, use the delete button (trash can icon ) in the actions column.



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

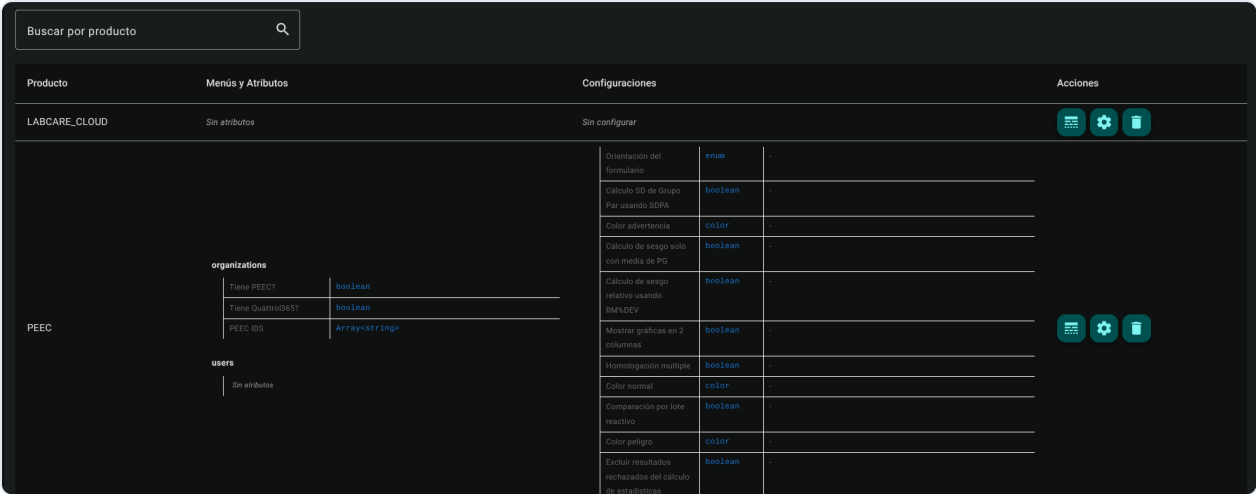
Follow the operation procedures to manage the system parameter grid:

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*

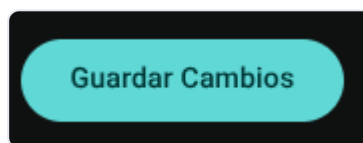
has_quattrol

Nombre*

Tiene Quattrol365?

Tipo*

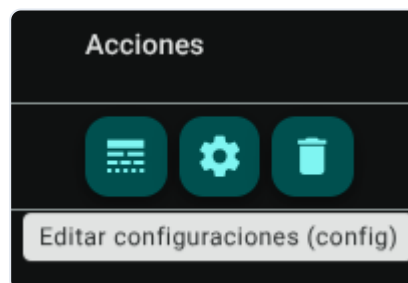
3. Once the parameters are completed, click the **Save Changes** button to apply and consolidate the product forms.



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):

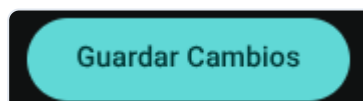
☐ Excluir resultados rechazados del cálculo de estadísticas

+ 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	

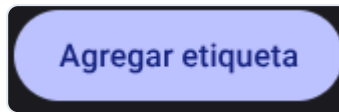
Items por pagina

10

Mostrando 1 - 1 de 1

2. Create a New Tag

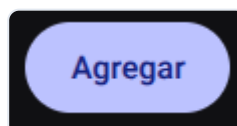
1. Click the **Add Tag** button in the upper right corner.



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

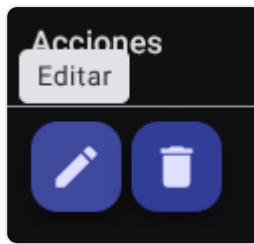
- **Name***
- **Description***
- **Color*** (Click on the bar to open the color selector/palette and define the tone).

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

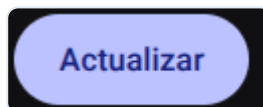
1. In the row of the desired label within the main table, locate the **Actions** column. click **pencil (Edit).



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

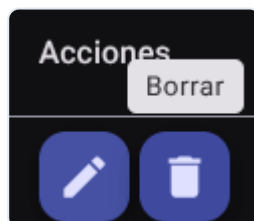
A dark blue form with three input fields. The first field is labeled 'Nombre*' and contains the text 'etiqueta prueba'. The second field is labeled 'Descripción*' and also contains 'etiqueta prueba'. The third field is labeled 'Color*' and shows a blue color bar. At the bottom right, there are two light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

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



4. Delete a Tag

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

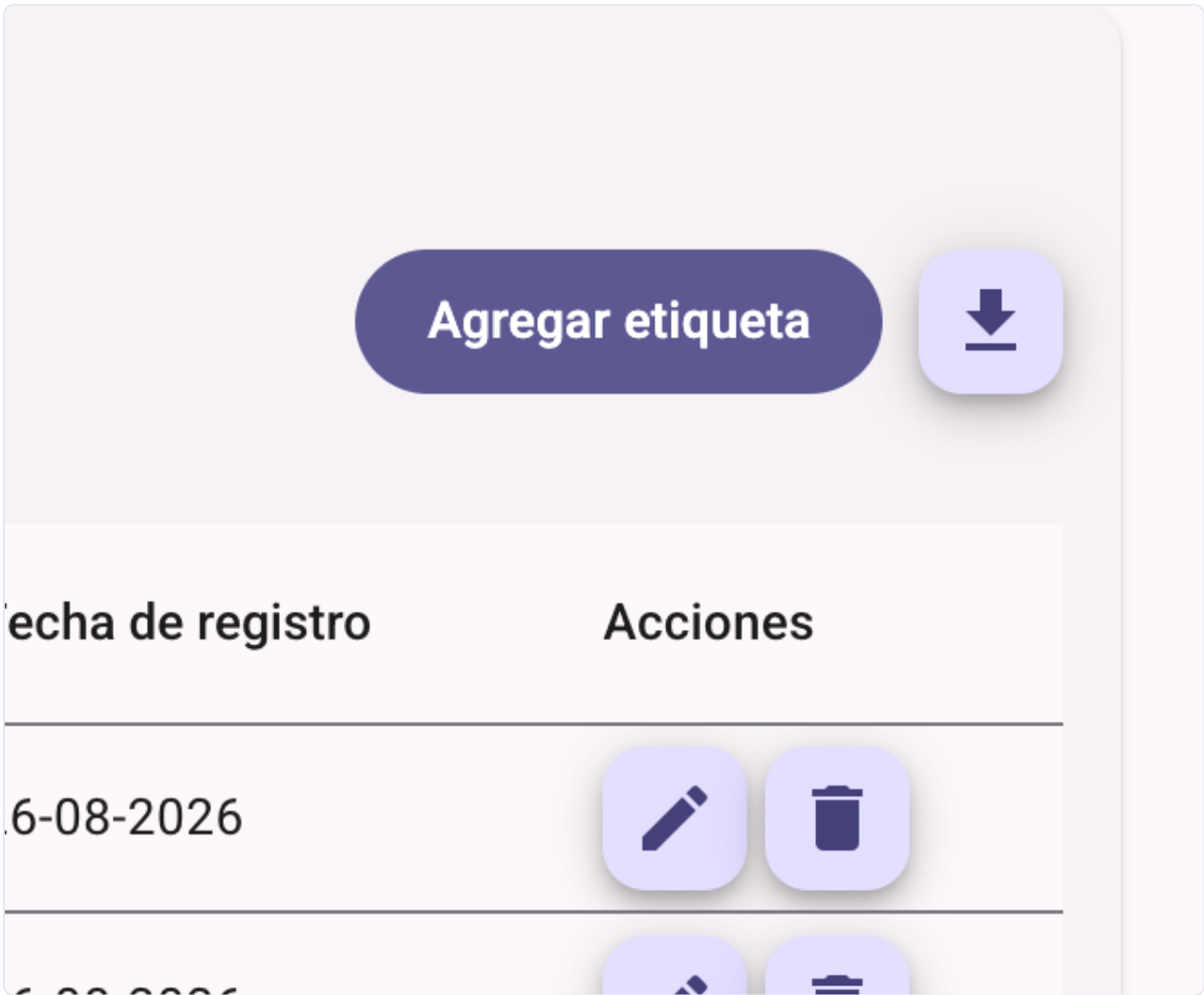


2. The system will display a direct confirmation box.

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

5. Export Tags

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



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

Roles and Permissions Required

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

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

System Languages (Internationalization)

Description, Purpose and Objective

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

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

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

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

Context of Use

This module is used by system administrators to:

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

Possible Actions

1. Check and Filter Languages

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

Configuraciones Generales > Lenguajes del Sistema

Buscar

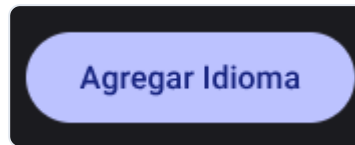
Agregar Idioma

Nombre	Abreviación	Acciones
Español de Colombia	es-co	

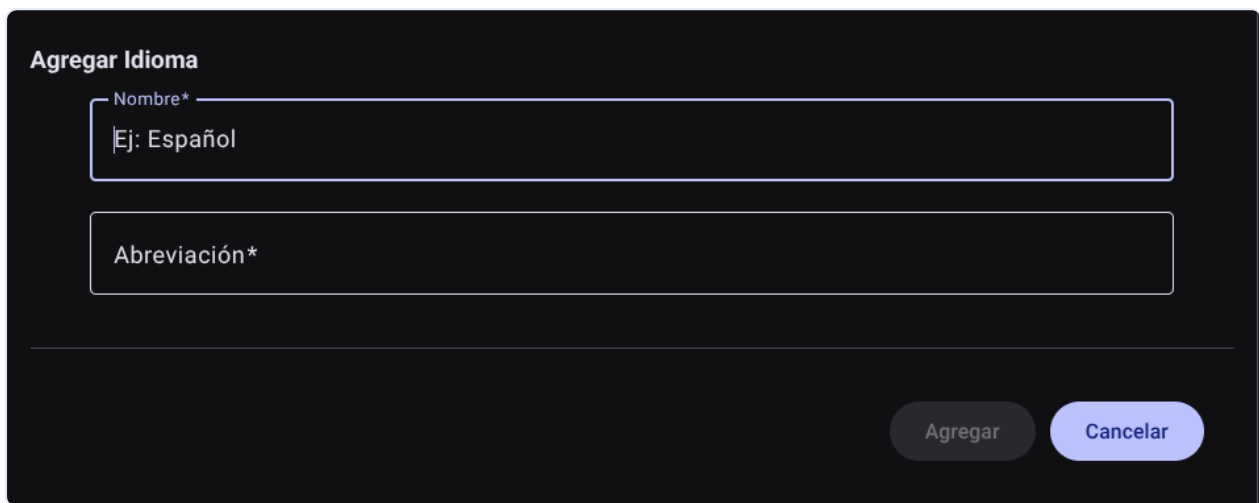
Items por página20Mostrando 1 - 1 de 1<<<>>>

2. Create a New Language

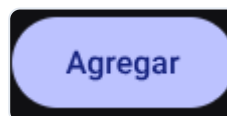
1. Click the **"Add Language"** button in the upper right corner.



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

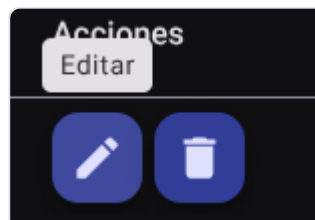


3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new language will be incorporated into the table list.

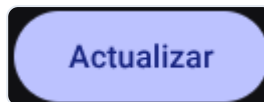


3. Edit an Existing Language

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

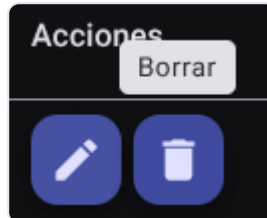


2. Open the side panel with the loaded information to modify the language name or abbreviation.
3. Press the **"Update"** button to save the changes to the system.

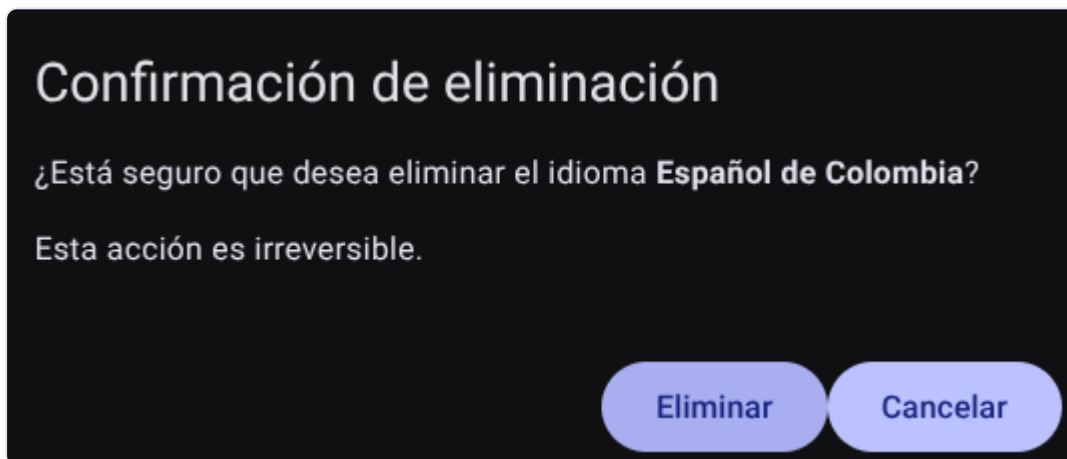


4. Delete a Language

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



2. The system will display a direct confirmation box



Roles and Permissions Required

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

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

Membership Administration

Description, Purpose and Objective

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

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

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

Context of Use

This module is used exclusively by global licensing administrators to:

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

Possible Actions

1. View and List Memberships

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

Configuraciones Generales > Membresías

Buscar

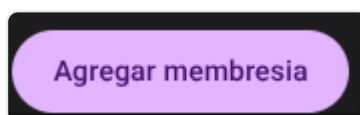
[Aplicar membresía](#)
[Remover membresía](#)
[Cambiar estado membresía](#)
[Agregar membresía](#)

Nombre	Descripción	Duración	Días de prueba	¿Es pública?	Costo general	Costo por día	Costo por mes	Periodo de pago	Productos	Fecha de registro	Acciones
Membresía Interna	Membresía Interna	Annual	900	Si	0	0	0	100	MIDNA, PEEC, QUATTROL, 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

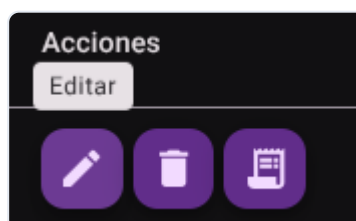
3. Click **"Add"** to register membership on the platform.



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?

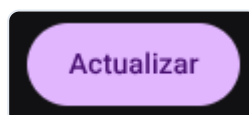
Costo*

Divisa*
 Periodo de pago en dias*

Cantidad de Usuarios*

☒ Midna
☒ PEEC
☐
☒ Quattrol 365
☐
☐
☐

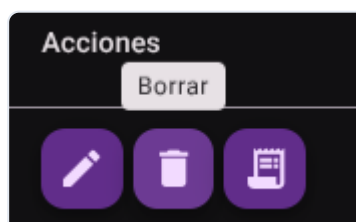
3. Click **"Update"** to apply the changes immediately.



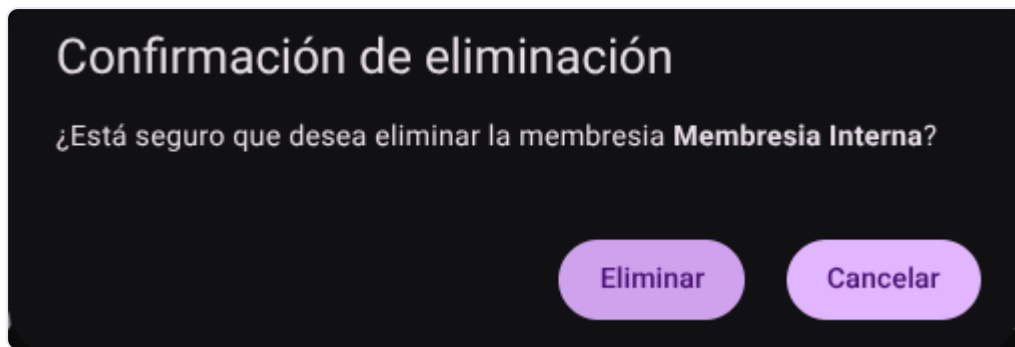
4. Delete a Membership

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.

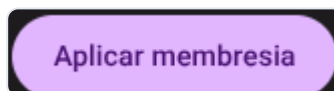


WARNING: The deletion action is irreversible and will be rejected by the system if the membership is currently assigned to any active organization on the platform.

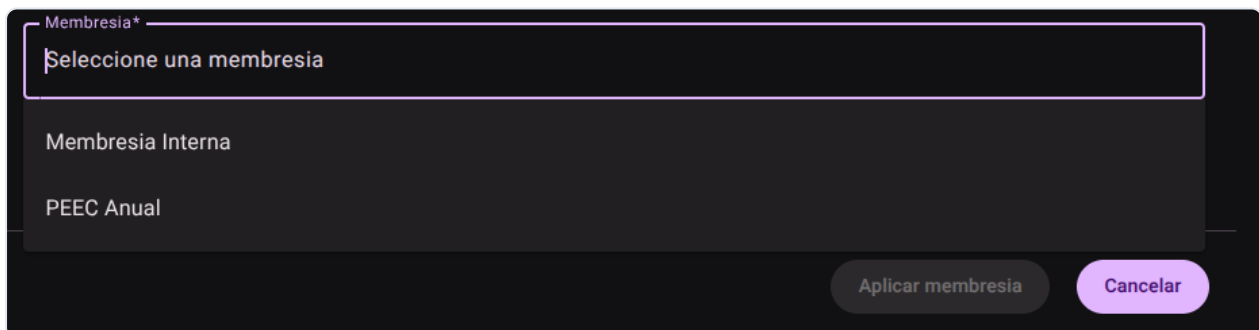
5. Apply Membership to Organizations

To associate a subscription with one or more client organizations:

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

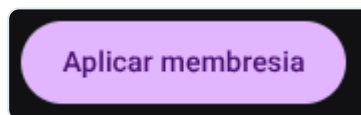


2. Select the desired membership from the drop-down list.



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

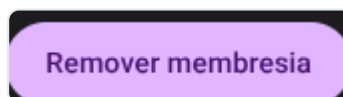
- Click **"Apply Membership"** to grant access to the platform.



6. Remove Membership

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

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



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

- 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

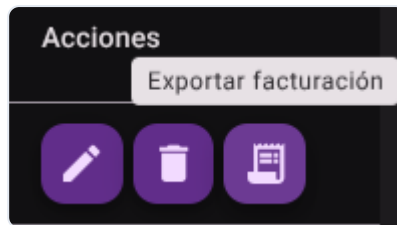
4. Press "**Apply Status**" button to apply.

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.

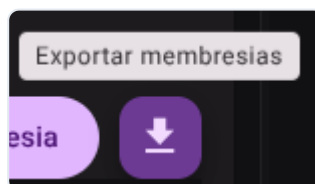
 A dark-themed pop-up window titled 'Exportar facturación Membresia Interna'. It features a text input field labeled 'Mes a registrar*' (Month to register*) with the value '08/2026' and a calendar icon. At the bottom, there are two light blue buttons: 'Exportar' (Export) and 'Cancelar' (Cancel).

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



9. Export Membership List

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



Roles and Permissions Required

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

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

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

System Menus and Navigation

Description, Purpose and Objective

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

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

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

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

Context of Use

This module is used by system infrastructure administrators to:

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

Possible Actions

1. Consult and Filter Menus

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

Configuraciones Generales > Menus del Sistema

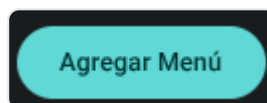
Buscar

Agregar Menú

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

2. Create a New Menu

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



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

Agregar Menú

Nombre*

Ej: Usuarios

Identificador*

Ruta*

Nivel*

Campos Adicionales

Productos:

☐ PEEC
 ☐ Quattrol 365
 ☐ Labcare Cloud

Debe seleccionar al menos un producto

Agregar

Cancelar

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



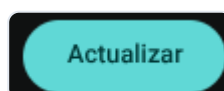
3. Edit an Existing Menu

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



 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.



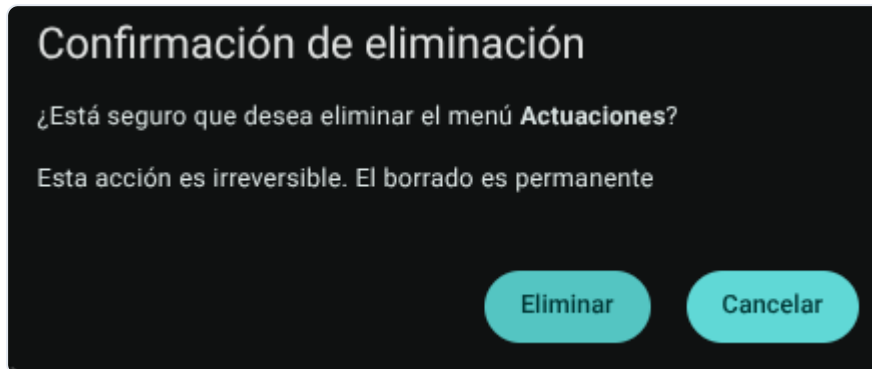
4. Delete a Menu

- 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 

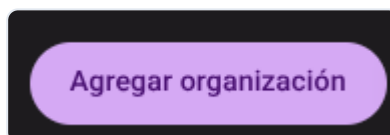
[Agregar organización](#) 

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?

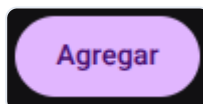
☐ Tiene Quattrol365?

PEEC IDS

+

Agregar Cancelar

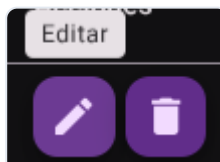
3. Press the **"Add"** button to save the record.



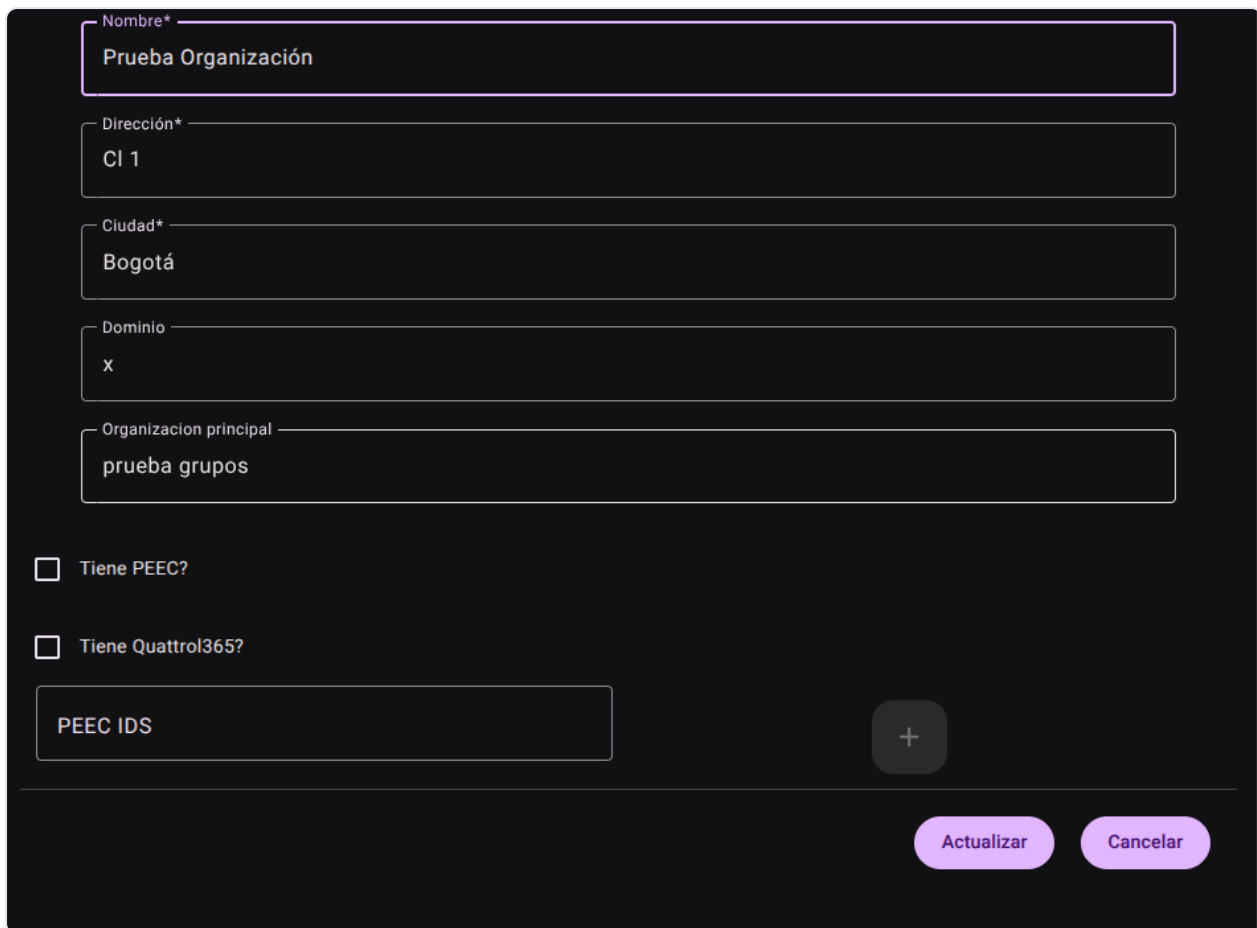
3. Edit an Organization

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

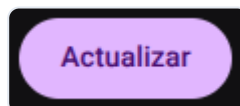
1. Locate the organization in the table and click the **"Edit"** action (represented by the pencil icon ).



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



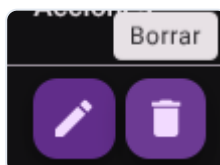
3. Make any necessary changes to the name, location, domain, or mapping of your parent hierarchical organization. There are no technical restrictions for updating these fields.
4. Click **"Update"** to apply the changes to the database.



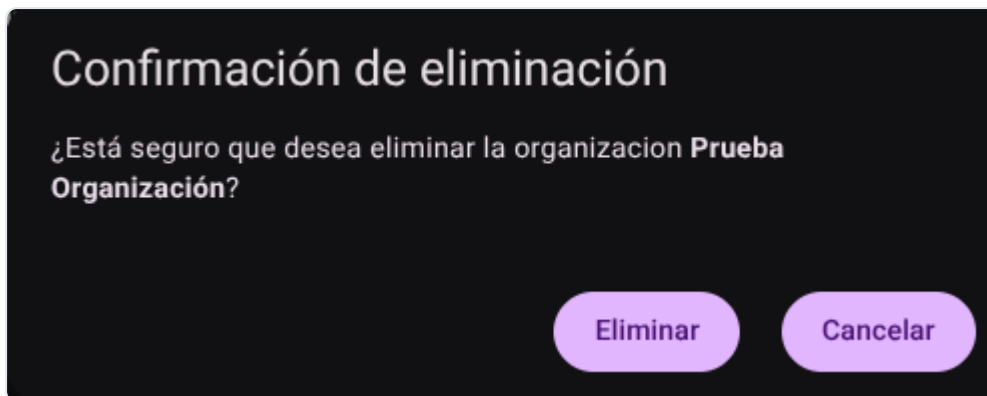
4. Delete an Organization

To permanently remove an entity from the platform:

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



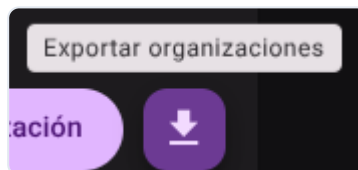
2. A confirmation modal will open warning that the action is irreversible and will affect the related data.



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`).

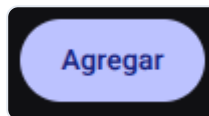
2. In the main table, consult the list of registered countries with their codes.

3. To register a new country, click **"Add Country"** and enter the Official Name and Code.

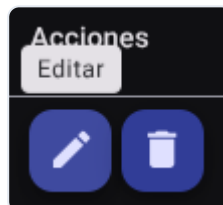


A dark-themed form for adding a new country. At the top, there is a blue button labeled "Agregar país". Below it, the form has two input fields: "Nombre*" with a placeholder "Ingrese el nombre" and "Código País*". At the bottom right of the form, there are two buttons: a grey "Agregar" button and a blue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

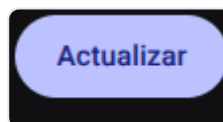
4. To add the country you must click the ****Add**** button



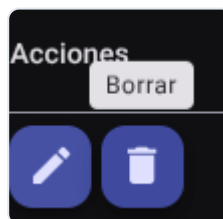
4. To modify an existing record, use the edit button (pencil icon).



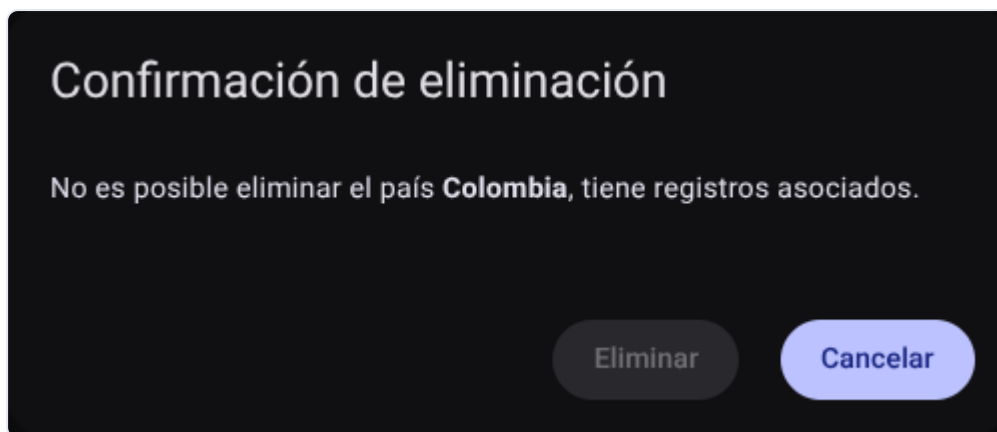
5. To save, click on the **Update** button at the bottom.



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.

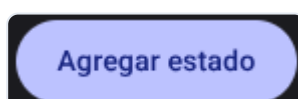
Configuraciones Generales > Estados

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)

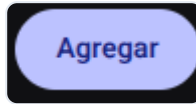
Agregar Cancelar

Ciudades (Presiona Enter o Coma para agregar)

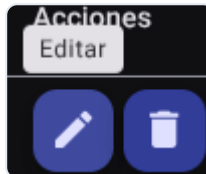
Bogotá ✕

Nueva ciudad...

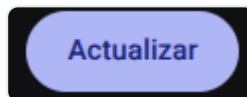
4. To add the **state** you must click the "**Add**" button.



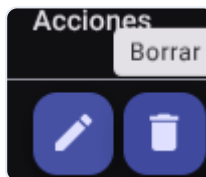
5. To modify an existing record, use the edit button (pencil icon).



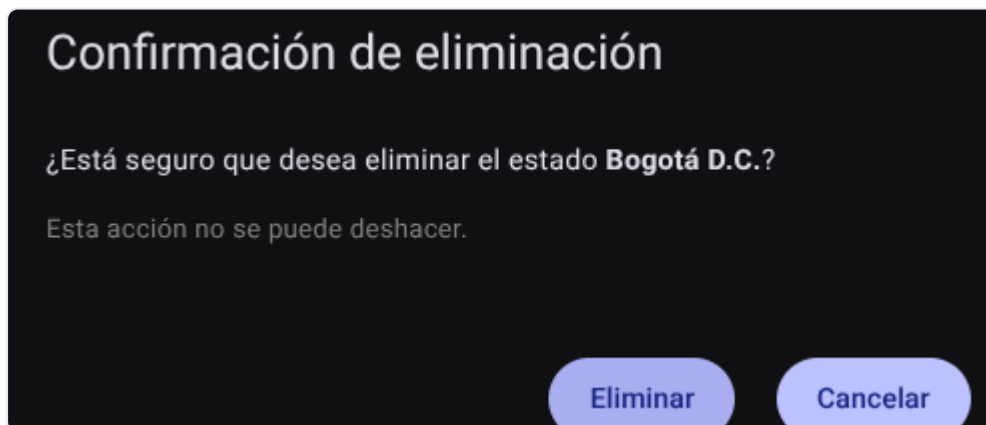
6. To save your changes, click the "**Refresh**" button at the bottom.



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

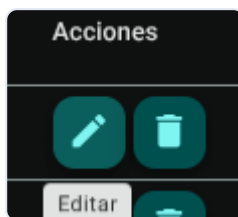
Cancelar

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

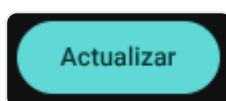
Agregar

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**).

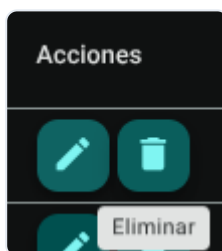


2. The panel with the loaded product information will be displayed, make the necessary adjustments and save using the "**Update**" button.

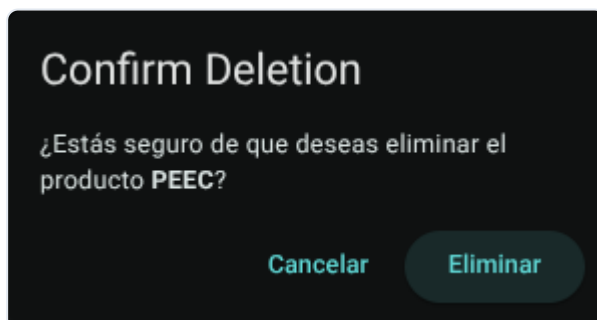


4. Delete a Product

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

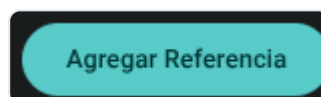
1. Consult and Filter References

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/WgMHLBjVooxnxwKqKKD	 
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:

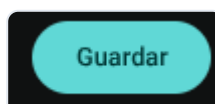
☒ URL
 ☐ Referencia BD

Valor o URL*

Guardar

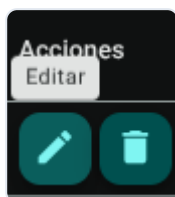
Cancelar

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

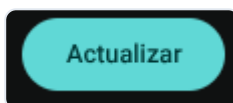


3. Edit an Existing Reference

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

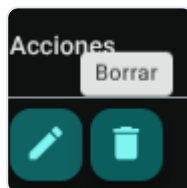


2. The **Edit Reference** panel will be displayed; Modify the key, change the mode (URL / BD) or update the route and save the changes using the **"Update"** button.

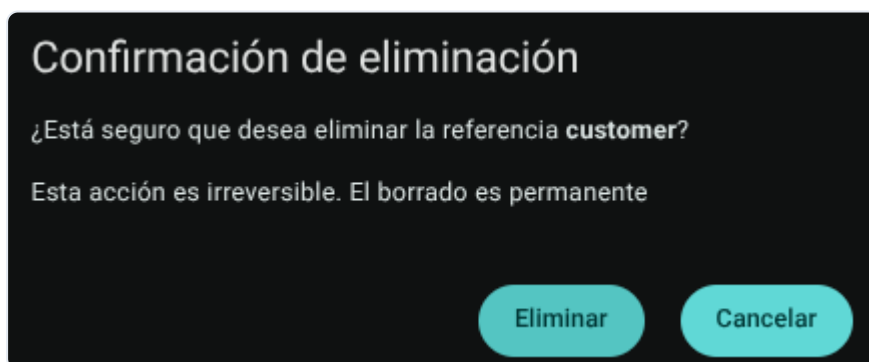


4. Delete a Reference

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

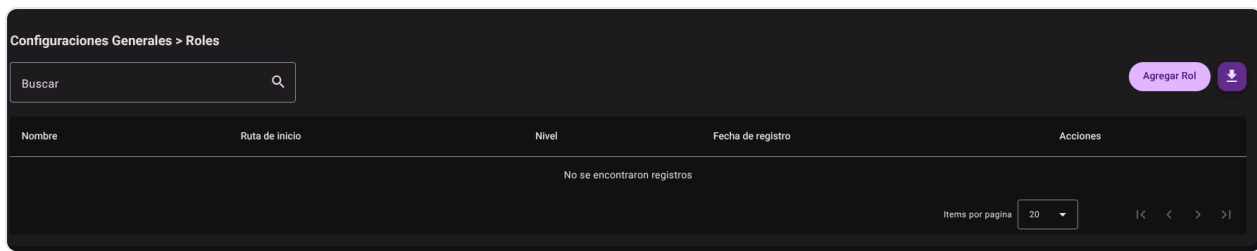
This module is used critically by Platform Administrators to:

- 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

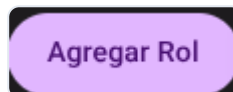
Shows the list of roles configured in the system with their essential data: the name of the role, its initial assigned path, the level and the entry date.



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

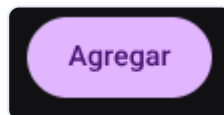
+

Roles ✕

Agregar

Cancelar

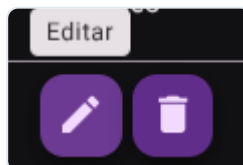
4. Click **"Add"** to save the role.



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

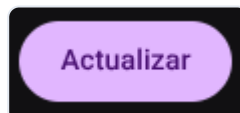
Roles

+

Actualizar

Cancelar

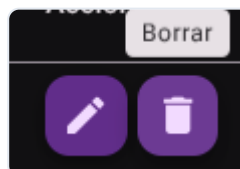
3. Click **"Update"** to apply the changes immediately.



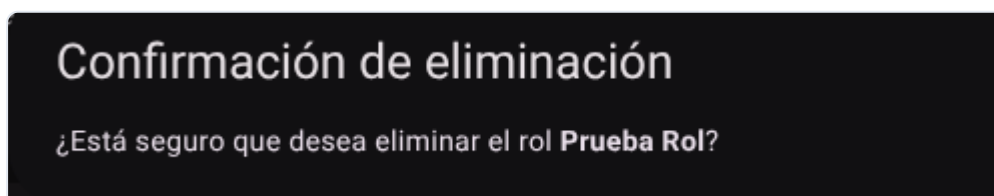
4. Delete a Role

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.

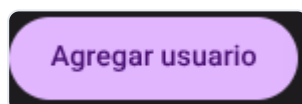
Configuraciones Generales > Usuarios												
Buscar										Agregar usuario		
Nombre	Apellido	Tipo de usuario	Nombre de usuario	Email	Telefono interno	Acepta TyC	Cargo	Idioma	Esta activo?	Fecha de registro	Acciones	
Astrid Camila	Martinez Medina	Usuario	Astrid Camila Martinez Medina	Astridcamila2009@hotmail.com	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	Bacteri(ologa	Español	No	14-11-2025		
Nancy Patricia	Martínez Barrera	Usuario	Nancy Patricia Martínez Barrera	nanpamaba@yahoo.es	3112372396	Si	NA	Español	Si	08-03-2024		
Diana	Quiñones Bacareo	Usuario	Diana Quiñones Bacareo	info@dqlaboratorio.com	3157280125	Si	NA	Español	Si	08-03-2024		

2. Add a New User

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

Add User

1. Click "Add User".



2. Fill out the form with the basic information:

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

Configuraciones Generales > Usuarios

Buscar

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

Nombre*

Santiago

Apellido*

Casallas

Email*

santiago.casallas@zymdev.com

Telefono*

3054070606

Cargo*

Administrative Assistant

Idioma*

Español

Dirección de residencia

el 1

Barrio

Ciudad

Bogotá

Estado

Pais

Tipo de documento de identidad

CC

Numero de documento de identidad

1234567890

Fecha de expedición del documento de identidad

Fecha de nacimiento

Organizaciones y roles

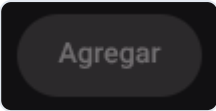
Organizacion

Oncólogos de Occidente

Rol principal

PEEC Química Clínica y Hematología

3. Click "Add" to create the account.

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

Add Internal User

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

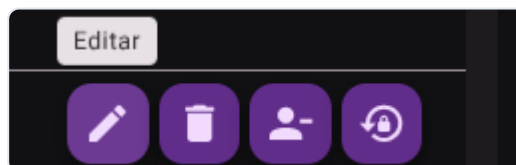
Add Patient

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

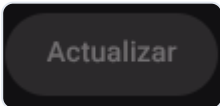
3. Edit a User

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

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



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

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

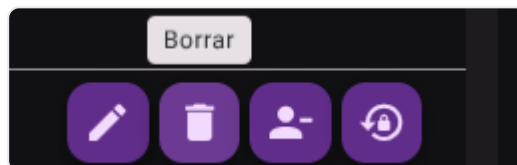
WARNING: For security and login integrity (authentication) reasons, the email address cannot be modified once the account has been created.

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

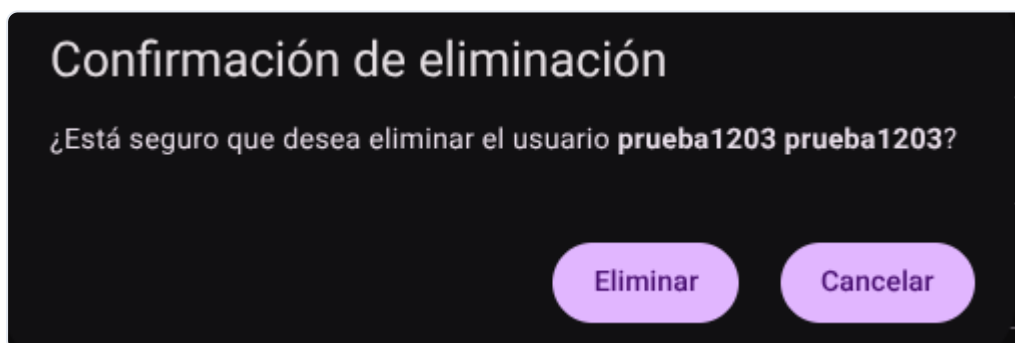
4. Delete a User

To permanently delete a user account:

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



2. confirm the action in the confirmation modal.



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

5. Activate or Deactivate User

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

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



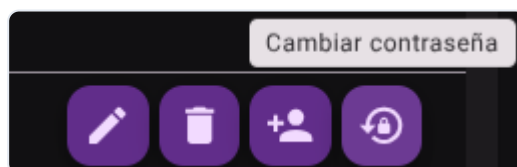
2. The system will toggle the **Are You Active?** between **Yes** (access allowed) **No** (access temporarily denied).

The image shows a vertical UI element with a dark background. It contains the text 'Esta activo?' in white. Below the text are two buttons: 'No' and 'Si', both in white text on a dark background.

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.

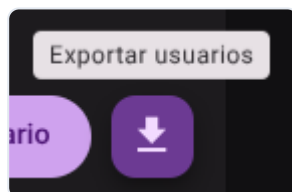


2. In the pop-up form, enter the new password and confirm it in the corresponding verification field.

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.

Certifications and Official Documents

Description, Purpose and Objective

NOTE: The **Certifications and Official Documents** view is the centralized module where the instructional documents of the events are consulted and downloaded, as well as the history of issued certifications organized by participant and year.

This module manages the consultation and download of documentary support through two main sections:

- **Program Documents:** Instructions and event guides available for direct download.
- **Certifications:** History of official certificates organized by participant, year and area of analysis.

The objective of this module is to offer immediate access to official documentation and event instructions, guaranteeing the traceability of the certificates issued.

Context of Use

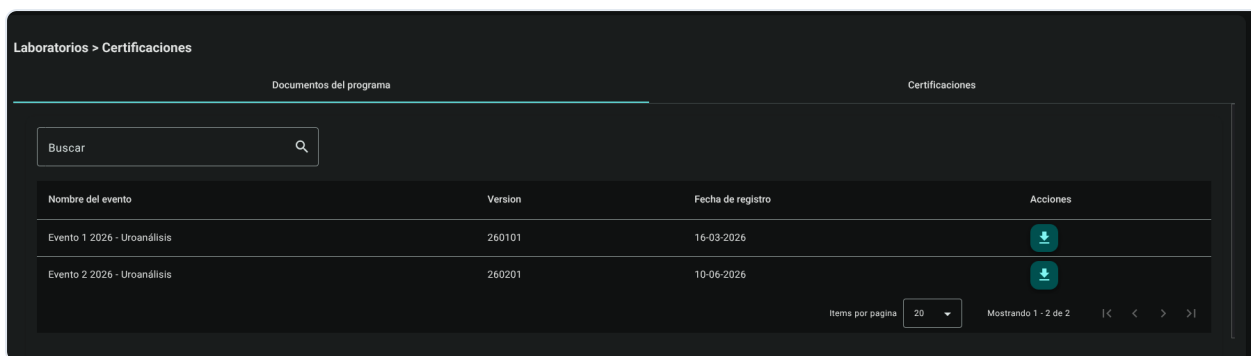
This module is used by:

- **Quality Directors and Auditors:** To consult and download the official certifications issued by participant and annual validity.
- **Organization Operational Personnel:** To obtain the necessary event guides and instructions before analytical processing.

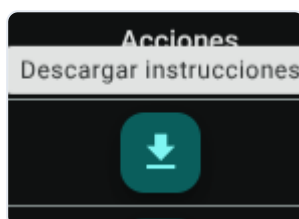
Possible Actions

1. "Program Documents" tab

1. **Search for events:** Use the search bar on the left to filter records by the name of the desired event.

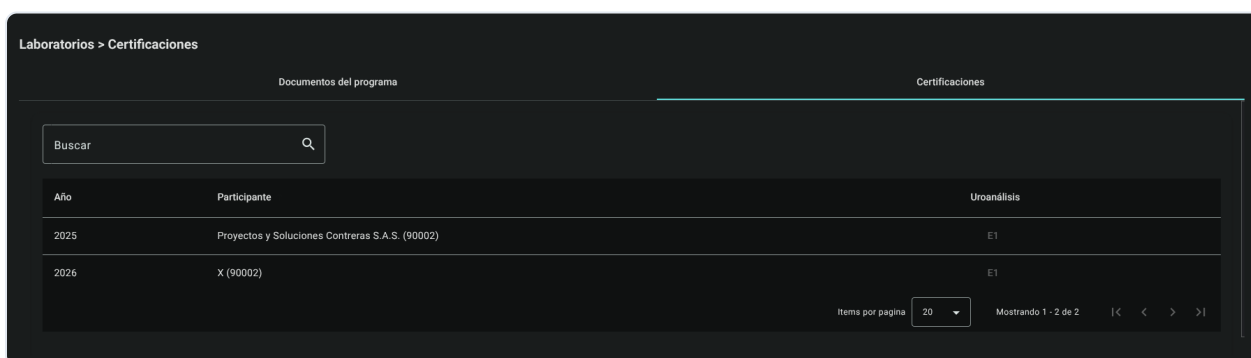


2. **Download instructions:** In the "Actions" column, locate the green download button (**Download Instructions**) corresponding to the desired record to obtain the instructional document. The download of the guide or instructions will begin directly when you press the action button.



2. "Certifications" tab

1. **Change view:** click on **the "Certifications"** tab located in the top menu.
2. **Consult records:** Review the table organized and filtered by the columns **Year**, **Participant** and the corresponding area/analysis. The certifications view automatically organizes the available history according to the recorded periods.



3. **Access the certification:** click on **the code or link in the cell of the analysis column** to view or download the certificate assigned to that year and participant.

Required Technical Permits

- **instructions_read** : Allows you to search and download event documents and instructions.
- **participation_certificate_read** : Authorizes the reading, consultation and download of certifications per participant and year. **

Event Documents

Description, Purpose and Objective

NOTE: The **Event Documents** view is the query console responsible for allowing you to explore, filter and sort the complete catalog of documents linked to events and evaluation rounds.

An **Event Document** brings together the technical guides, annexes and information files organized by:

- **Year:** Annual validity of the evaluation round.
- **File:** Official name of the technical document or insert.
- **Type of Equipment / Measurement:** Dynamic columns that contain direct access or download links according to the area or type of test.

The objective of this module is to guarantee the real-time availability of the documentary supports for each event through instant sorting and filtering tools.

Context of Use

This module is used by:

- **Laboratory Analysts:** To locate and inspect technical files for specific samples or events.
- **Quality Coordinators:** To audit the availability of documents by year and type of measurement.

Possible Actions

1. Consult and Search Files

1. **Search files:** Use the search bar (**Search**) and enter keywords to quickly filter the desired document. The list filters the data visible in real time according to the text entered in the search engine.
2. **Sort the table:** Click on any of the column headers (**Year**, **File** or the equipment/measurement type) to toggle between ascending and descending order. The table updates the order of the records immediately when you click any column header.
3. **Access the document:** Select the links or option codes available within the table rows to open or download the corresponding file.

Documentos de Eventos						
Buscar						
Año	Archivo	Glucometros				
2026	Webinar 3	E5	E6	E9		
2026	Presentación	E5	E6	E6		
2026	Acuerdo de confidencialidad	E5	E6	E6		
2026	Mesas de ayuda 1	E5	E6	E6		
2026	Mesas de ayuda 3	E5	E6	E6		
2026	Instrucciones de solicitudes de certificado e informes	E5	E6	E6		
2026	Mesas de ayuda 6	E5	E6	E6		
2026	Ficha técnica	E5	E6	E9		
2026	Instrucciones de anelacion	F5	F6	F6		

Required Technical Permits

- `event_documents_read` : Grants permissions to search, sort and access documents linked to events.

Events and Evaluation Rounds

Description, Purpose and Objective

NOTE: The **Events and Evaluation Rounds** view is the administrative console in charge of the comprehensive administration of events (creation, editing, duplication, export, generation of statistics, auditing and report management).

An **Event** constitutes the operational unit of analytical evaluation and is defined by the following components:

- **General Parameters:** Name, version, type of measurement and cut-off date (*deadline*).
- **Reports and Documents:** Technical guides, instructions and consolidated report files.
- **Statistical Processing:** Calculation of metrics, averages and analytical deviations.
- **Participation Control:** Enabling participating users and organizations.

The objective of this view is to orchestrate the entire life cycle of evaluation events, from their initial configuration to the issuance of statistical reports and audit of results.

Context of Use

This module is used by administrators and technical directors to:

- **Manage the entire event cycle:** Create, clone or modify round rules and deadlines.
- **Process data and generate statistics:** Run the calculation engines to consolidate comparative metrics.
- **Manage reports and documents:** Attach technical guides, issue consolidated reports and audit participations.

Possible Actions

1. Filter and Sort the Table

1. Enter text in the search bar (**Search**) to filter the table records in real time.
2. Click any column header (**Name, Version, Type, Date**) to toggle ascending or descending sorting.
3. The table responds immediately to the text entered and the interaction with the headers.

Participación > Eventos

Buscar

Asignar eventos actuales

Agregar evento

Nombre	Versión	Fecha de corte	Tipo	Secciones	Debug	Pruebas	Activo	Precargar todos los dropdowns?	Tipo de estadística	Fecha de registro	Acciones
Evento 1 2025 - Hematología	250103	21-04-2025	Hematología	Hematología	No	Muestra 1	No	Si	Sin Estadística	22-01-2025	
Evento 1 2018 - Uroanálisis	180101	01-08-2024	Uroanálisis	General	No	PU1, PU2	No	No	Sin Estadística	14-09-2024	
Evento 1 2018 - Química	180102	01-08-2024	Química	Química Clínica, Inmunoensayo	No	Muestra N. 1	No	Si	Sin Estadística	14-09-2024	
Evento 1 2018 - Hematología	180103	27-09-2024	Hematología	General	No	Muestra N. 1	No	No	Estadística Comparativa	14-09-2024	
Evento 1 2026 - Encuesta de satisfacción	260110	31-12-2026	Encuesta de satisfacción	General	No	Respuesta	Si	No	Sin Estadística	22-01-2026	
Evento 1 2024 - Uroanálisis	240101	01-08-2024	Uroanálisis	General	No	PU1, PU2	No	No	Sin Estadística	07-09-2024	
Evento 3 2022 - Uroanálisis	220301	01-01-2021	Uroanálisis		No		No	No	Sin Estadística	13-09-2024	
Evento 1 2022 - Química Molecular	220102	01-01-2021	Química		No		No	No	Sin Estadística	13-09-2024	

2. Create a New Event

1. Click the **Add Event** button located in the upper right corner of the view.
2. In the side panel, fill out the general parameters, deadlines and instructions for the event. Event Name and Version: Defines the identifier and version code of the event.
 - **Cut-off date:** Establishes the deadline for receiving or recording data.
 - **Type of event:** select the corresponding technical area from the drop-down menu (Uroanalysis, Chemistry, Hematology, Glucometers, etc.).
 - **Preload all** dropdowns: Activate this checkbox if you require the system to automatically load all associated dropdown lists by default.
 - **Type of statistics:** Choose the data processing model from the options: No statistics, Comparative Statistics or Individual Statistics.

Fecha de corte*

Tipo*

☐ Precargar todos los dropdowns

Tipo de estadística*

Sin Estadística

Secciones

Seccion

+

Pruebas

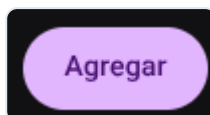
Prueba

+

Agregar

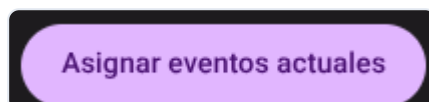
Cancelar

3. Click **Add** to log the event to the system.

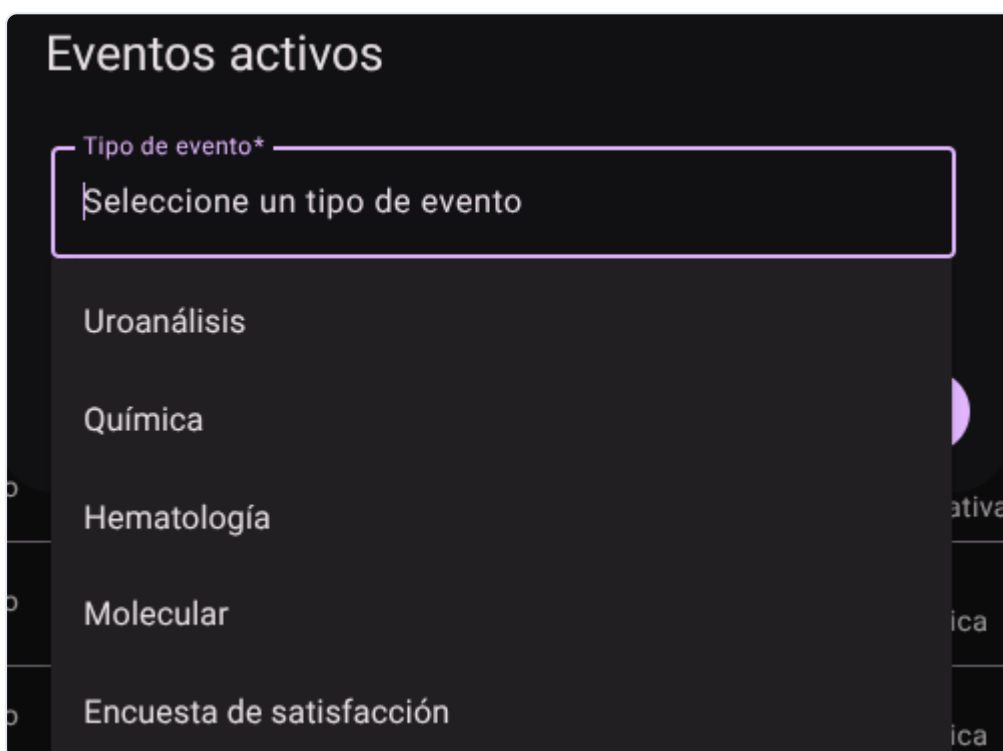


3. Assign Current Events

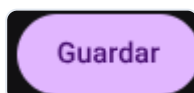
1. Click the **Assign Current Events** button on the top bar.



2. The system will display a list with the records available to the active period or work group.

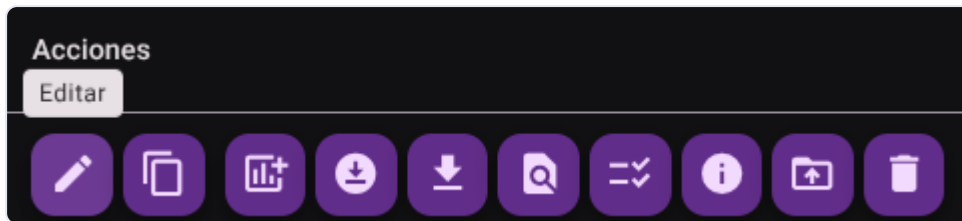


3. Click **Save** to add the event.



4. Edit an Event

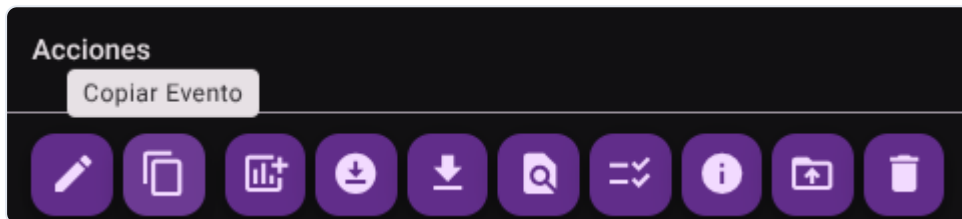
1. In the corresponding event row, locate the actions context bar and click on the **Edit** option (pencil icon).



2. Modify the general parameters, sections or rules of the event.
3. Press **"Save"** to update the changes.

5. Copy an Event (Duplicate)

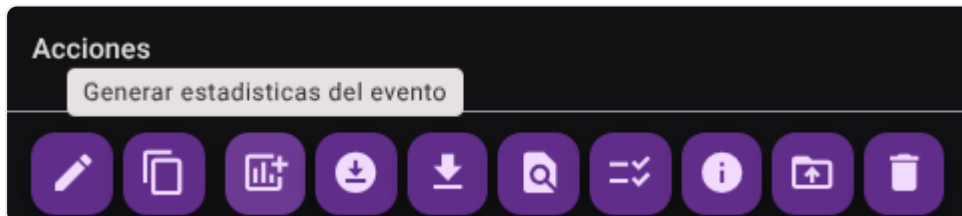
1. In the row of the event to duplicate, click on the **"Copy Event"** icon.



2. The system will clone the entire event configuration to generate a new editable record.

6. Generate Event Statistics

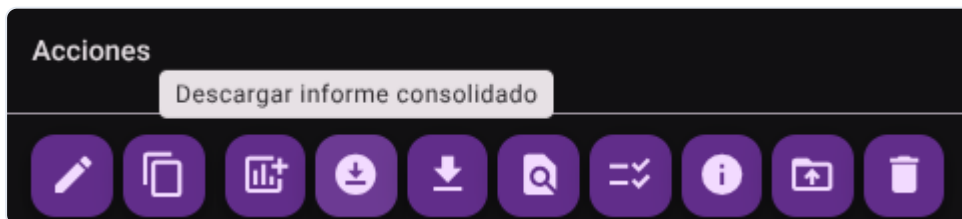
1. In the event row, click the **"Generate event statistics"** action.



2. The system will process the collected data to calculate comparative statistics and metrics, updating the operational status of the event.

7. Download Event or Consolidated Report

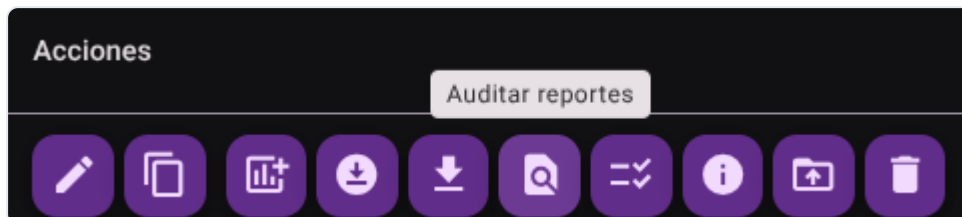
1. In the event row, click the **"Download Event Report / Consolidated"** icon.



2. The download of the individual report of the event or consolidated data will begin immediately.

8. Audit Event Reports

1. In the event row, select the **"Audit reports"** option.



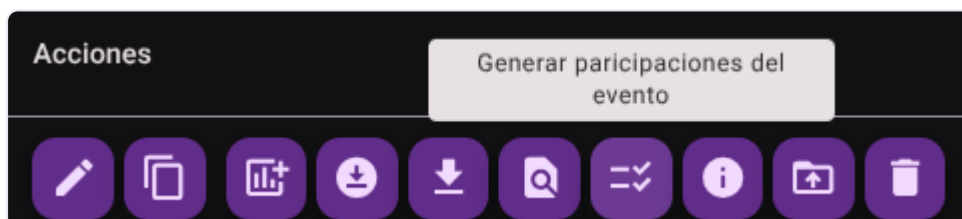
2. Review and validate the consistency of the reports generated before final publication.

9. Upload Instructions or Upload Reports

1. In the event row, select the **"Upload Instructions"** or **"Upload Reports"** action.
2. Attach the technical guide files or finalized reports to the system.

10. Generate Event Entries

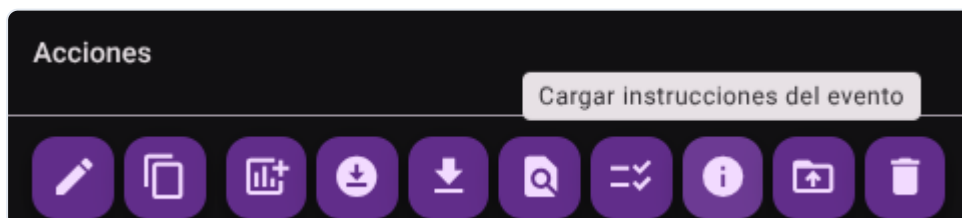
1. In the event row, click the **"Generate Entries"** action.



2. The system will automatically assign and enable the corresponding participations to the users and entities of the event.

11. Upload event instructions

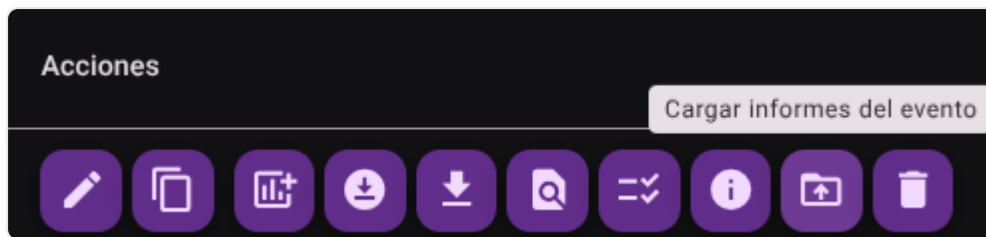
1. In the event row, click the **"Load Event Instructions"** action.



2. The system will load the instructions for the corresponding event.

12. Upload Event Reports

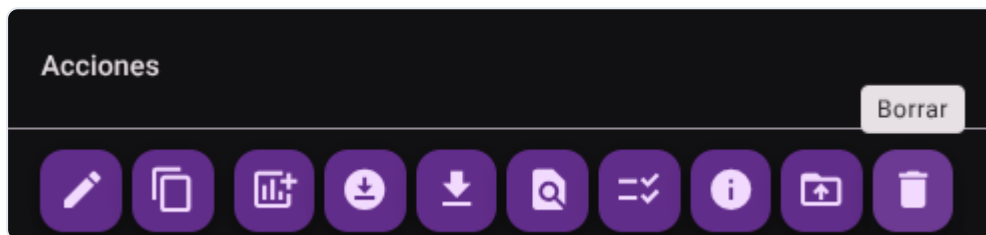
1. In the event row, click the **"Upload Event Reports"** action.



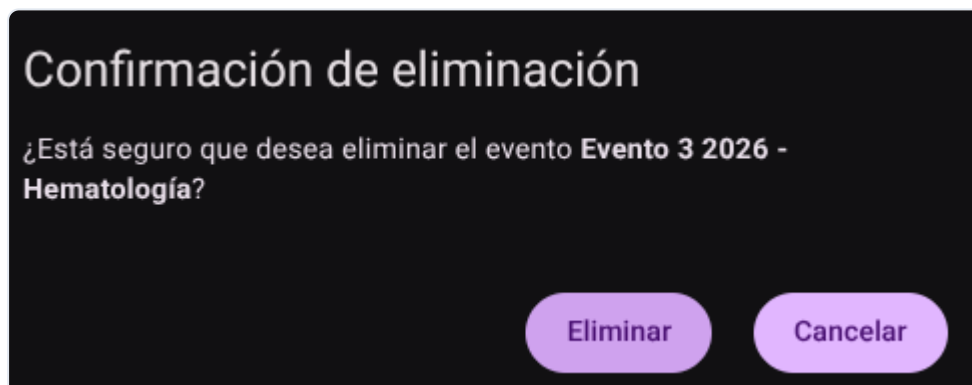
2. The system will load the corresponding event reports.

13. Delete an Event

1. In the row of the event to be removed, click the **Delete** icon (red trash icon).

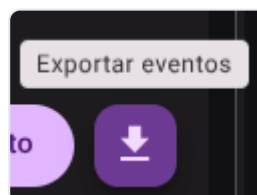


2. Confirm the action in the pop-up window to delete the event permanently.



14. Export the General List of Events

1. Click the download icon button (**Export**) next to the top actions.



2. The system will generate and immediately download a report file **.CSV** with the general list of events.

Statistical Models in Proficiency Testing (PEEC / POQTROL)

NOTE:

- **No Statistics:** Modality used for qualitative collection or descriptive surveys without parametric contrast between participants.
- **Individual Statistics:** Used when the participant's performance is directly contrasted against a pre-established reference value (e.g. manufacturer's target value or primary reference calibrator).
- **Comparative Statistics (Algorithm A of ISO 13528):** Robust interlaboratory consensus model. Calculates the robust mean ($\bar{x}$) and the robust standard deviation (s) minimizing the influence of extreme or atypical data (*outliers*) without the need to arbitrarily discard participants.

Required Technical Permits

- `event_read` : Allows you to consult the catalog and search for events.
- `event_create` : Authorizes the creation of new events and the duplication of configurations.
- `event_update` : Enables parameter editing, instruction loading and reporting.
- `event_delete` : Allows permanent deletion of events.
- `event_export` : Authorizes the massive export of data and download of consolidated data.

Molecular Biology Results Entry

Description, Purpose and Objective

NOTE: The **Molecular Biology Results Entry** console is the specialized interface of the PEEC platform designed to record methodological data, qualitative detection and quantification of viral load in samples associated with Molecular Biology programs.

The purpose of this module is to unify the analytical data load for key viral pathogens (such as HIV, HCV and HBV) evaluated by participating laboratories. Its objective is to ensure the methodological traceability of the laboratory (extraction and amplification platforms) and to standardize the quantitative report using a uniform logarithmic scale ($\log_{10}$), facilitating the subsequent comparative statistical analysis of the results.

Context of Use

This panel is operated in the laboratory routine by:

- **Bacteriologists and Molecular Biology Professionals:** To enter the qualitative and quantitative readings (viral load) obtained in the PCR analytical runs of the corresponding aptitude event.
- **Quality Coordinators:** To validate that the selected technologies and commercial platforms match the reagents in use and confirm correct shipment before the close of the PEEC round.

Step by Step for Recording Results

Follow the technical procedure to complete data capture in the module:

1. Uploading the Participant Form

1. Access the **Molecular Biology** screen (via the respective Dynamic Event path).
2. Click the **Participant Number*** drop-down field.
3. Type or select from the autocomplete list the ID of the assigned participant.
4. The system will automatically invoke the structure and active viral markers corresponding to the event phase in the lower grid.

Participación > Molecular

A continuación puede ingresar los resultados del programa PEEC de Evento 2 2026 - Molecular

Número de participante*

Participación > Molecular

A continuación puede ingresar los resultados del programa PEEC de Evento 2 2026 - Molecular

Número de participante*

Seleccione un ID

90002G

90002H

2. Filing of Results by Analyte (HIV, HCV, HBV)

For each of the molecular markers represented in the questionnaire sections, complete the following three fields in detail:

- Method:** Click on the drop-down list and select the commercial platform, reagent kit or amplification technology used by the laboratory.
 - Examples of options: COBAS AmpliPrep/COBAS TaqMan , COBAS 6800 , RealTime m2000 , GeneXpert System .
- Qualitative Value:** Select the diagnostic interpretation of the clinical trial run from the drop-down list.
 - Options: Detectable or No detectable .
- Quantitative Value:** Enter in the text field the absolute numerical value corresponding to the viral load of the sample expressed on a base 10 logarithmic scale ($\log_{10}$ IU/mL or copies/mL).
 - Note: Be sure to follow standard decimal notation to avoid cell integrity warnings.

Participación > Molecular

A continuación puede ingresar los resultados del programa PEEC de Evento 2 2026 - Molecular

Número de participante*

90002H

HIV

Método

Método

Valor cualitativo

Valor cuantitativo (Registre sus resultados en log10)

HCV

Método

Método

Valor cualitativo

Valor cuantitativo (Registre sus resultados en log10)

HBV

Método

Método

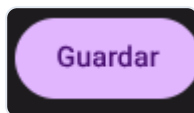
Valor cualitativo

Valor cuantitativo (Registre sus resultados en log10)

Guardar

3. Data Saving

1. Once you have completed entering the methodology and results for all the viruses corresponding to the event, scroll to the end of the interface.
2. Press the **Save** button located in the lower right corner.
3. The system will validate the structure of the fields and permanently store the information on the server, linking traceability to the evaluated participant.



Methodology and Standardization of Viral Load in Molecular Biology

IMPORTANT: Standardization Guidelines for the Molecular Biology Professional:

- **Logarithmic Transformation ($\log_{10}$):** The quantification of viral nucleic acids (HBV DNA, HIV and HCV RNA) presents wide dynamic dispersion. The report is standardized in logarithm to base 10 ($\log_{10}$) to allow linear comparison and evaluation of interlaboratory performance: $\log_{10}(\text{Viral Load}) = \log_{10}(\text{Copies/mL or IU/mL})$ *Example:* A result of $100,000 \text{ IU/mL}$ is exactly equivalent to $5.00 \log_{10} \text{ IU/mL}$.
- **Lower Limit of Detection (LoD):** If the sample is below the analytical quantification limit of the method, select **Detectable** only if there was an amplification signal and document if it is a value

Roles and Permissions Required

The consultation and entry of data in the Molecular Biology module is conditioned by the following roles and permissions:

The roles enabled to interact with this console are **Clinical Bacteriologists**, **Molecular Diagnostic Specialists** and **Laboratory Directors**.

- **Display and Access:**
 - **dynamic_event_read** : Allows you to load the dynamic screen of the Molecular Biology event and consult the list of participants.
- **Capture and Modification:**
 - **dynamic_event_create** /
- **Elimination:**
 - **dynamic_event_delete** : Authorizes the restart or cleaning of the participant's questionnaire in case of justified cancellation of the round.

Entry of Chemistry and Hormones Results

Description, Purpose and Objective

NOTE: The **Chemistry and Hormones Results Entry** console is the unified interface of the platform designed to capture, plot and record the technical measurement parameters and quantitative results corresponding to the **Immunoassay** and **Clinical Chemistry** programs (including POQTROL Chemistry).

The purpose of this module is to centralize the analytical reporting of high-turnover quantitative and semiquantitative analytes (such as hormones, metabolites, enzymes, infectious markers, and electrolytes) under a dynamic environment structured per participant. Its objective is to guarantee complete traceability of the analyzing equipment, the methodological principle and the batch of commercial reagent used, ensuring the consistency and integrity of the numerical format according to the specific measurement units of each measurand.

Context of Use

This panel is operated on a daily basis by:

- **Bacteriologists and Analytical Technicians:** To enter the readings of the controls, calibrators or samples of the PEEC/POQTROL event corresponding to the chemistry or immunoassay analytical run of the shift.
- **Quality Coordinators:** To review the batch numbers and methodologies reported by the operators and confirm the final sending of the entries to the external evaluation system.

1. Immunoassay Submodule (Infectious / hCG)

Purpose

Entry of analytical data for the evaluation of serological tests, infectious markers, hormonal immunoassays and special qualitative and quantitative determinations.

Participant Selection

When accessing the event-specific section (*Infectious* or *hCG*), select **Participant Number*** from the top drop-down menu. The system will automatically load the matrix of analytes and samples corresponding to the active round.

Participación > Química

A continuación puede ingresar los resultados del programa PEEC de Evento 3 2026 - Química

Número de participante*

Test Traceability Parameters

For each of the tests on the list, complete the following methodological traceability fields before capturing the result:

- **Instrument:** Select the analyzer device or reading system from the drop-down list.
 - *Examples of options:* Architect , Cobas e series , Access , Vitros Eci , Lumipulse , Lectores POCT ,
- **Method:** Define the analytical technique or immunological principle used.
 - *Examples of options:* Quimioluminiscencia – CLIA , Electroquimioluminiscencia – ECLIA , ELISA , Inmunocromatografía / Prueba Rápida , Fluorescencia .
- **Reagent Lot:** Enter or select the lot code printed on the immunoassay reagent kit used.

Participación > Química

A continuación puede ingresar los resultados del programa PEEC de Evento 3 2026 - Química

Número de participante*
90002C

Fecha final de reporte para Evento 3 2026 - 16 de Septiembre

Química Clínica

-

Si su instrumento/método no se encuentra dentro del listado, por favor comuníquese a resultados@labcarecolombia.com

Acido Urico (mg/dl)	Acido Urico (mg/dl)
	Resultado
Albúmina (g/dl)	Albúmina (g/dl)
	Resultado

Response Capture

- **Numeric Result:** Enter the quantitative value or cut-off index obtained from the analyzer reading. It is reported in the units corresponding to the specific analyte (e.g. S/CO, COI, mIU/mL, IU/L, pg/mL).

Si su instrumento/método no se encuentra dentro del listado, por favor comuníquese a resultados@labcarecolombia.com

Acido Urico (mg/dl)	Acido Urico (mg/dl)
	Uricasa - catalasa
	Resultado
	Si

2. Clinical Chemistry Submodule (Chemistry / POQTROL Chemistry)

Purpose

Capture quantitative results for substrates, enzymes, metabolites, lipids and electrolytes on automated clinical chemistry platforms or point-of-care (POCT) devices.

The screenshot displays the 'Participación > Química' section of the POQTROL Chemistry interface. It includes a header with the text 'A continuación puede ingresar los resultados del programa PEEC de Evento 3 2026 - Química'. Below this, there is a text input field for 'Número de participante*' containing the value '90002C'. A date label indicates 'Fecha final de reporte para Evento 3 2026 - 16 de Septiembre'. A section titled 'Química Clínica' contains a large empty text area. At the bottom, a message states: 'Si su instrumento/método no se encuentra dentro del listado, por favor comuníquese a resultados@labcarecolombia.com'. Below this message, there are two columns of test names: 'Acido Urico (mg/dl)' and 'Albúmina (g/dl)'. To the right of these columns is a dropdown menu for 'Acido Urico (mg/dl)' with the text 'Seleccione una opción'. The dropdown list shows four options: 'Uricasa - catalasa', 'Uricasa peroxidasa con ascorbato oxidasa', 'Uricasa peroxidasa sin ascorbato oxidasa', and 'Uricasa- PAP'.

Participant Selection

Select the identification code in the **Participant Number*** field to display the samples and the grid of active measurands assigned to the analytical event.

Test Traceability Parameters

Complete the following required fields to contextualize the behavior of the chemistry team:

- **Instrument:** Select the chemistry analytical platform used from the drop-down list.
 - *Examples of options:* Cobas c series , AU480/AU680 , Architect c series , Mindray BS , Vitros Chemistry ,
- **Method:** Select the chemical or physical-chemical principle of the analysis.
 - *Examples of options:* Espectrofotometría / Colorimetría , Enzimático Punto Final , Cinético , Ion Selectivo – ISE Directo/Indirecto , Turbidimetría .
- **Reagent Lot:** Enter or select the active chemical reagent lot code.

Inmunoensayo

Si su instrumento/método no se encuentra dentro del listado, por favor comuníquese a resultados@labcarecolombia.com

TSH (uU/ml)	TSH (uU/ml) Seleccione una opción
Prolactina (ng/ml)	Aptasys Indra CLIA Aptasys Indra CLIA Autobio CLIA Autobio CLIA Biocheck Inc ELISA
PSA total (ng/ml)	PSA total (ng/ml) Resultado
T3 Libre (pg/ml)	T3 Libre (pg/ml) Resultado

Response Capture

- **Numeric Result:** Fill the cell with the absolute quantitative value obtained in the reading. The system validates the numerical range and formats the decimals according to the units of the measurand (e.g. *mg/dL*, *mmol/L*, *U/L*, *g/dL*).

Inmunoensayo

Si su instrumento/método no se encuentra dentro del listado, por favor comuníquese a resultados@labcarecolombia.com

TSH (uU/ml)	TSH (uU/ml) Aptasys Indra CLIA
	Resultado 5

Expected Results and Confirmations

- **Input Validation:** By pressing the **Save** button located at the footer of the page, the system verifies that all cells contain consistent numerical data and that the reagent lots are not left empty.
- **Successful Registration:** Readings and traceability data (equipment and method) are permanently associated in the Firestore database under the participation of the evaluated user.

Analytical and Metrological Considerations for the Report

IMPORTANT:

- **Units of Measurement and Conversion Factors:** Rigorously verify that the reporting units on the form match those configured on your analyzer (e.g. Glucose in \$mg/dL\$ vs. \$mmol/L\$; Enzymes in \$U/L\$ at \$37^{\circ}C\$). A unit error generates an artificial deviation attributable to the scale factor that will invalidate the evaluation of the event.
- **Cut-off indices (*Cut-off*) in Infectious Diseases:** In serological screening tests, report the exact numerical value of the cut-off ratio (\$S/CO\$ or \$COI\$) issued by the automated reader, avoiding

reporting only textual qualifiers (*Reactive/Non-Reactive*), since the numerical value allows the evaluation of interlaboratory reproducibility.

Roles and Permissions Required

The entry and consultation of results in the Chemistry and Immunoassay modules are governed by the following security directives:

The roles authorized to interact with these views are **Bacteriologist / Chemistry Analyst, Analyzer Operator** and **Quality Director**.

- **Access and Viewing:**
 -
- **Capture and Insertion:**
 - `dynamic_event_create` /
- **Elimination:**
 -

Urinalysis Results Entry

Description, Purpose and Objective

NOTE: The **Urinalysis Results Entry** console is the specialized interface designed to collect and record in a structured way the physical, chemical and microscopic analyzes of urine samples (partial urine and sediment) within the framework of external quality evaluation programs (PEEC).

The purpose of this module is to channel the results of the participants through parameterized dynamic questionnaires. Its objective is to standardize and validate the capture of the different components of the urine sample, organizing the fields into sequential thematic sections that use drop-down menus (*Dropdowns*) with qualitative, quantitative, semi-quantitative or binary qualification options, thus guaranteeing the consistency of the reported data.

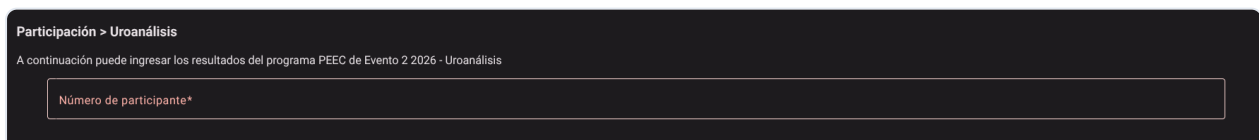
Context of Use

This panel is operated in the laboratory routine by:

- **Bacteriologists and Urinalysis Technicians:** To record organoleptic, chemical and instrumental measurements of samples from the assigned PEEC program.
- **Quality Coordinators:** To review and audit the biological and clinical correlation between the physical-chemical report and the findings of the urinary sediment in the microscope.

Sections of the Dynamic Capture Questionnaire

The form is organized into four consecutive sections:



The screenshot shows the top section of a web form. It has a dark header bar with the text 'Participación > Uroanálisis' in white. Below this, in a lighter grey bar, is the text 'A continuación puede ingresar los resultados del programa PEEC de Evento 2 2026 - Uroanálisis'. The main content area is white and contains a text input field with the placeholder text 'Número de participante*'.

1. Physical Analysis

Section dedicated to the organoleptic evaluation of the specimen through single selection lists:

- **Appearance:** Selection of the transparency or turbidity of the urine sample.
 - *Examples of options:* Normal/Límpido , Ligeramente turbio , Turbio , Espumoso .
- **Color:** Selection of the shade and visible pigmentation of the sample.

- *Examples of options:* **Amarillo claro** , **Amarillo oscuro** , **Ámbar** , **Incoloro** , **Naranja** , **Rojo** ,

Fecha final de reporte Evento 2 - 2026: 24 de Junio

Fecha final de reporte Evento 2 - 2026: 24 de Junio

Análisis Físico

Aspecto

Color

Color

Seleccione una opción

Amarillo claro

Amarillo oscuro

Ámbar

Azul o verde

Incoloro

Análisis Físico

Aspecto

Seleccione una opción

Espumoso

Ligeramente turbio

Normal/Límpido

Turbio

2. Biochemical Analysis (Reagent Strip / Automated)

Section for recording the chemical behavior of urine using test strips.

- **Technical Configuration (Equipment/Strip):** Initial mandatory drop-down to define the manufacturer or model of the analyzer or chemical reading strips.
 - *Examples of options:* **Acon/Insight strips** , **Arkray Aution Sticks** , **Analyticon Biotechnologies** .
- **Specific Gravity (Density):** Discrete numerical options that measure the concentration of solutes in urine.
 - *Examples of options:* **1.000** , **1.005** , **1.010** , **1.015** , **1.020** ,
- **pH:** Selection of the absolute level of acidity or alkalinity of the specimen.
 - *Examples of options:* **5.0** , **5.5** , **6.0** , **6.5** , **7.0** ,
- **Proteins / Glucose:** Semi-quantitative scale of protein and sugar concentration.

- Examples of options: **Negativo** , **0.1 g/L** , **0.3 g/L** / **Negativo** , **>= 1000 mg/dL** ,
- **Ketones / Bilirubin / Urobilinogen / Hemoglobin / Leukocyte Esterase:** Semiquantitative results represented by crosses, mass concentrations or volumetric intervals.
- Examples of options: **1+** , **0.1 mmol/L** , **0.2 mg/dL** , **10-25 Leu/uL** .
- **Nitrites:** Qualitative selection of reducing bacterial presence.
 - Examples of options: **Negativo** , **Positivo** .

Análisis Bioquímico	
Si su lectura es automatizada a continuación seleccione su instrumento, de lo contrario elija la marca o nombre de su tira para lectura manual	
Gravedad Específica	Gravedad Específica
pH	pH
Proteínas	Proteínas
Glucosa	Glucosa
Cetonas	Cetonas
Bilirrubina	Bilirrubina

Gravedad Específica

Seleccione una opción

1,000

1,001

1,002

1,003

1,004

Cetonas

pH

Selecione una opción

5

5,5

6

6,5

7

Bilirrubina

Proteínas

Selecione una opción

>= 1000 mg/dL

>=10 g/L

0,1 g/L

0,15 g/L

0,25 g/L

Cetonas

Selecione una opción

0,1 mmol/L

0,5 mmol/L

1 +

1,0 mmol/L

1,5 mmol/L

Nitritos

Seleccione una opción

Negativo

Positivo

3. Microscopic Analysis (Urinary Sediment)

Section intended for the reporting of insoluble structures in the urine sediment after centrifugation.

- **Method / Equipment:** Selection of the sediment counting system or method.
 - *Examples of options:* Cámara de Neubauer , Arkray Aution Eleven , Sysmex , Atellica Series .
- **Cellular Elements and Bacteria:** Drop-down menus for counting epithelial cells, leukocytes, red blood cells and bacteria, either by numerical range per high power field (HPF) or qualitative scale of crosses.
 - *Examples of options:* 0-5 /HPF , >= 100 /uL , 1+ , 2+ , 3+ ,
- **Cylinders and Crystals:** Abundance display for cylinders (Hyaline, Granular, Waxy or Cellular) and crystals of clinical significance (Calcium Oxalate, Uric Acid or Urates).
 - *Examples of options:* No se observa , 0-1 xC , 2-4 xC , 5-10 xC , 1+ to
- **Artifacts and Biologicals:** Options to report mucus, yeast/fungi and parasites.
 - *Examples of options:* Ausente , Presente , Escasas .

Análisis Microscópico

Tenga en cuenta que solo debe reportar NO SE OBSERVA para aquellos parámetros que reporta habitualmente en sus pacientes pero no vio en la muestra de control de calidad externo, deje en blanco los espacios de aquellos parámetros que NO reporta rutinariamente

Tenga en cuenta que solo debe reportar NO SE OBSERVA para aquellos parámetros que reporta habitualmente en sus pacientes pero no vio en la muestra de control de calidad externo, deje en blanco los espacios de aquellos parámetros que NO reporta rutinariamente

Bacterias	Bacterias
Leucocitos	Leucocitos
Hematíes	Hematíes
Cilindro Celular (eritrocitario)	Cilindro Celular (eritrocitario)
Cilindros Grasosos	Cilindros Grasosos
Cilindros Granulosos	Cilindros Granulosos

Seleccione una opción

Arkay Aution Eleven 4020

Atellica® Series Automated Urinalysis System

Aution Max Series

Cámara de Neubauer

Dirui FUS 2000/FUS 3000

Leucocitos

Seleccione una opción

>= 100 /HPF

>= 100 /uL

>= 100 xC

0 - 5 /HPF

0 - 5 /uL

Cilindros Cerosos

Seleccione una opción

0 - 1 xC

2 - 4 xC

5 - 10 xC

No se observa

Moco

Seleccione una opción

Ausente

Presente

Parásitos

4. Special and Semiquantitative Tests (Microalbuminuria, Creatinuria, hCG)

Complementary module for reports of special determinations in urine:

- **Reagent Selection:** Menu to select the manufacturer of the rapid test or reagent.
 - Examples of options: Abon , Acon/Insight , Beckman Coulter ICON , BTS 350 .
- **Results:** Quantitative cut-off ranges or binary qualitative readings.
 - Examples of options: 10 mg/L , 30 mg/L , 100 mg/L , Positivo/Negativo .

The screenshot displays a dark-themed software interface with three distinct sections for urine tests. Each section contains two input fields for numerical results and a dropdown menu for selecting the reagent manufacturer. The sections are: Microalbuminuria Semi-Cuantitativa, Creatinuria Semi-Cuantitativa, and hCG.

5. Final Save

- After completing the necessary spaces, you only need to click the **Save** button at the end of the form at the bottom right

Clinical-Pathological Correlation and Quality Control in Urinalysis

TIP: Critical Verification Points for the Bacteriologist:

- **Physical-Chemical Correlation vs. Microscopic:** Before sending, audit the internal consistency of the report:
- If the **Hemoglobin / Occult Blood** pad is clearly positive but no erythrocytes are observed in the sediment, consider hematuria with osmolar lysis (density < 1.010 o $\text{pH} > 7.5$) or presence of myoglobin.
- If the **Leukocyte Esterase** reaction is positive, it must necessarily be correlated with the presence of leukocytes (pyocytes) in the microscopic sediment.
- A **Positive Nitrite** reaction requires microscopic evaluation of significant bacteriuria, remembering that gram-positive bacteria and certain species (such as *Enterococcus faecalis*) do not reduce nitrates to nitrites.
- **Sediment Standardization:** Using traditional optical microscopy, verify that the sediment concentration meets the standard ratio of 12 mL of urine centrifuged at $400 \times g$ for 5 minutes and decanted to $0.5 - 1.0 \text{ mL}$.

Roles and Permissions Required

Access and registration of data in the Urinalysis module is conditioned by the following system permissions and roles:

The profiles enabled to operate this interface are the **Bacteriologist / Urinalysis Analyst** and the **Quality Director**.

- **Access and Viewing:**
 - `urinalysis_read` : Allows entry to the `/laboratory/urinalysis` console and viewing the form sections.
- **Capture and Insertion:**
 - `urinalysis_create` / `urinalysis_update` : Authorize the filling out of the drop-down menus (physical, chemical and microscopic) and enable the saving of the participant's data on the server.
- **Elimination:**
 - `urinalysis_delete` : Allows you to cancel or clear the participant's results form to restart their typing.

Registrations and Enrollments

Description, Purpose and Objective

NOTE: The **Registrations and Registrations** view is the administrative console where the complete process of consulting, registering, managing and exporting participant registrations on the platform is managed.

An **Registration** represents a participant's registration record and includes the following key fields:

- **Name and Email:** Identification and contact information of the participant.
- **Organization:** Entity or headquarters associated with the registry.
- **Participant ID:** Unique identifier code in the system.
- **Year:** Validity of the evaluation period.
- **Uploaded Events:** Selection of events or programs of the period enabled for the participant.

The objective of this module is to control the formal access of venues and participants to evaluation events, ensuring the traceability of their data and subscriptions.

Context of Use

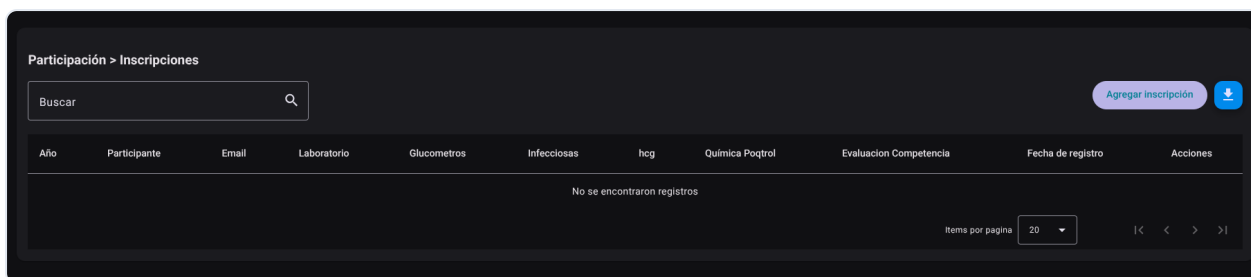
This module is used by administrative coordinators to:

- **Consult and export registrations:** Audit the active list of participants by year or location.
- **Register new registrations:** Link participants to organizations and upload their corresponding events.
- **Manage existing registrations:** Modify registration data or revoke active registrations.

Possible Actions

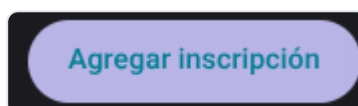
1. Consult and Filter Registrations

1. Use the search bar (**Search**) to quickly locate a participant by name, email, or organization.
2. Click on the header of any of the columns (*Year, Participant, Email, Organization*, etc.) to sort the table ascending or descending.
3. The list updates the data display in real time.



2. Register a New Registration

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



2. In the side panel that appears, fill out the required fields:

- **Name***
- **Email**
- **Organization***
- **Participant ID***
- **Year***

3. Press the *****Load Events**** button to enable the selection of events or programs for the period entered.
4. Finish the registration by clicking the **"Add"** button (or select **"Cancel"** to close the panel without saving).
5. The main table will update the list in real time after saving the registration.

3. Edit an Existing Registration

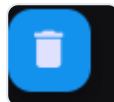
1. In the row of the desired registration within the main table, locate the **Actions** column.
2. Click the ****edit button (Edit, pencil icon)**.



3. Open the edit form to update the participant's information or active registrations.
4. Save changes to update the log in real time.

4. Delete an Entry

1. In the **Actions** column of the corresponding participant's row, click the ******Delete**" button (trash can icon).



2. Confirm the action to permanently delete the participant's registration from the system.

5.Export the Registration List

1. Click the **blue button with download icon (**Export Enrollments**) located at the top right of the view.
2. The system will directly download the file with the complete consolidated registrations.

Required Technical Permits

- `registration_read` : Authorizes the consultation and filtering of the registration register.
- `registration_create` : Allows you to register participants and load events from the period.
- `registration_update` : Enables editing of participant data and active registrations.
- `registration_delete` : Allows permanent deletion of enrollment records.
- `registration_export` : Authorizes the download of the complete registration report. **

Questions and Dynamic Form

Description, Purpose and Objective

NOTE: The **Questions and Dynamic Form** view is the administrative tool for the configuration, creation and administration of the question bank for forms, dynamically adapting the fields according to the type and subtype of response required.

A **Question** is defined by the following components:

- **Response Type and Subtype:** Technical classification of input control (**Dropdown** , **Description** , **File** , **Text** , **Number** , **Date**).
- **General Attributes:** Version*, Section*, Label*, Order*, box Allows enrollment? and Related Questions.
- **Contextual Validations:** Predefined options, correct answer, regular expressions (*RegEx*), file size limits, min/max values and date/time ranges.

The objective of this module is to allow the dynamic and parameterizable design of capture forms without the need to make modifications to the application source code.

Context of Use

This module is managed by program designers and analytics coordinators to:

- **Build data entry forms:** Parameterize adaptive response types with strict validations.
- **Import and export the question bank:** Bulk upload or download question banks in CSV format.
- **Manage order and sections:** Control the visual sequence and distribution of fields on end-user forms.

Possible Actions

1. Filter and Sort the Question Bank

1. Use the search bar (**Search**) to find specific questions by statement, version or type.
2. Click on the header of any of the columns (*Version*, *Type*, *Registration Date*, etc.) to sort the list in ascending or descending order.

Participación > Preguntas

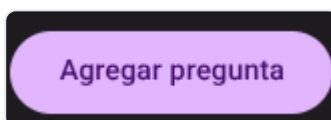
Buscar 

Agregar pregunta  

Version	Orden	Tipo	Subtipo	Sección	Etiqueta	¿Se puede enlazar?	Grupo de preguntas	Fecha de registro	Acciones
260202	47	dropdown	by_test	Química Clínica	Sodio (mmol/l)	Si	95d5555b-31c5-4189-8817-8fa8ff5e4e80	19-05-2026	 
260101	9	dropdown	by_test	Análisis Bioquímico	Bilirrubina	No	2ca0a28a-760a-463b-a633-b364682abc69	16-03-2026	 
250102	8	number	float	Química Clínica	Resultado	No	c7327029-6858-4d54-82b2-64054b2c03c8	24-02-2025	 
260303	21	number	float	Hematología	WBC (Óptico) x10 3/uI	No	6a80347f-b678-4a5b-bfc7-ddefbee68290	10-08-2026	 
250303	15	description	label	Hematología	Registre resultados para 1 (una) única opción por cada recuento, Óptico o Impedancia según aplique de acuerdo al método usado por su instrumento	No	8e5a8a41-3599-4c5f-ae62-78bd959f966d	14-08-2025	 
250203	16	number	float	Hematología	Plaquetas (Impedancia) x10 3/uI	No	269dbdf9-cd54-454c-afce-78476c54f605	13-05-2025	 
240301	30	dropdown	by_test	Análisis Microscópico	Moco	No	56ee6543-db8d-45bd-a5cc-0230e77d5a7c	07-09-2024	 
250402	36	number	float	Química Clínica	Resultado	No	3ceb7c20-d6f6-4917-8216-2940fbd86508	01-12-2025	 
250202	46	number	float	Química Clínica	Resultado	No	a6b12bfb-bc71-40f4-8ad6-384ecf4c17bf	13-05-2025	 

2. Create a New Question

1. Click the **Add Question** button.



2. In the side panel that appears, select the **Question Type** and its corresponding **Question Subtype**. The side form will dynamically adjust and invoke only the required fields based on the chosen combination:
 - **Dropdown** (*basic / by_test*): For dropdown lists. Allows you to add options, define the default option and mark the correct answer.
 - **Description** (*label / title*): To insert titles or explanatory labels that do not require a user response.
 - **File**: To attach documents. Requires defining the maximum size (MB), maximum number of files and file types allowed.
 - **Text** (*large / short*): For free text entries (short or long responses). Allows validation using regular expressions (*RegEx*).
 - **Number** (*integer / float*): For integer or decimal number inputs. Allows you to set limits with *Minimum value* and *Maximum value*.
 - **Date** (*date / datetime*): To capture dates and/or times. Allows you to define ranges (*Minimum Date/Time* and *Maximum Date/Time*).

The image shows a dark-themed user interface for selecting a question type. At the top left, there is a label "Tipo de pregunta*" followed by a text input field containing the placeholder text "Selecione un tipo de pregunta". Below this input field, a dropdown menu is open, displaying five options: "dropdown", "description", "file", "text", and "number". To the right of the dropdown menu, there is a red rounded rectangular button labeled "Cancelar".

3. Complete the mandatory and general contextual fields: **Version**, **Section**, **Label**, **Order**, the **Allows enrollment?** box (if applicable) and the association of **Related Questions**.

Tipo de pregunta*

dropdown

Subtipo de pregunta*

basic

Version*

Etiqueta*

Orden*

Opciones

Opción

+

Opción por defecto

Respuesta Correcta

☐ ¿Permite enrolar?

Preguntas Relacionadas

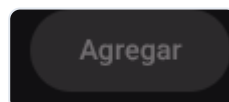
Pregunta

+

Agregar

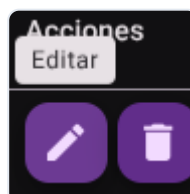
Cancelar

4. Click **"Add"** to save the question or **"Cancel"** to exit without keeping your changes. The main table will update the list and endorse the structure according to the assigned order.

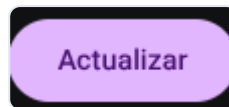


3. Edit an Existing Question

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

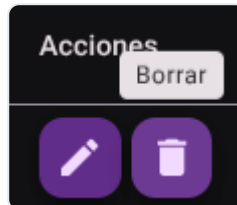


2. Open the side panel with the loaded information to modify the type, subtype, labels, order or validation options. 3. Press **"Update"** to update the question in the system.

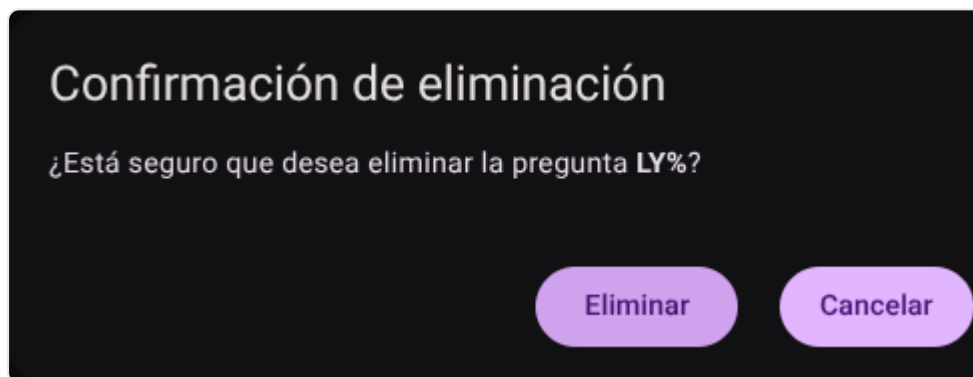


4. Delete a Question

1. In the **Actions** column of the row of the question to be removed, click the **Delete** button (trash can icon).

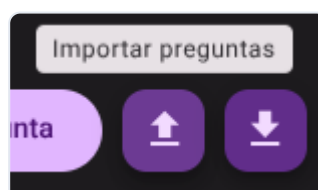


2. Confirm the action to permanently remove the question from the system.

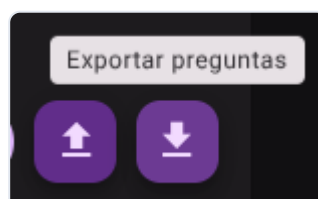


5. Import and Export Questions Massively

1. Locate the arrow icon buttons (up/down) next to "Add Question".
2. **Bulk upload:** Press the **import button (up arrow) to upload a CSV file with the battery of questions.



3. **Bulk Download:** Press the **export button (down arrow) to get a CSV file with the complete parameterized question bank.



Required Technical Permits

- `questions_read` : Allows consultation and filtering of the question bank.
- `questions_create` : Authorizes the creation and mass import of questions with dynamic validations.
- `questions_update` : Enables editing of question types, subtypes, tags, and ranges.
- `questions_delete` : Allows the permanent removal of questions from the catalog.
- `questions_export` : Authorizes the download of the question export file.

Download Reports and Certificates

Description, Purpose and Objective

NOTE: The **Download Reports and Certificates** view is the final module of the proficiency testing and external quality control (PEEC) program, responsible for storing, managing and distributing analytical and interpretive reports to participating organizations after the close of each evaluation round.

This console is divided into two operational sections:

- **Individual Report:** Allows administrators to upload results files and participation certificates in PDF format for each organization and round. Participants access this tab to download their individual report.
- **Report interpretation (Summary):** Stores consolidated reports and general interpretive summaries that explain the global behavior of all participants and the consensus values calculated for the round.

The objective of this view is to centralize the official delivery of evaluated results and accreditation certificates, eliminating manual sending of emails and guaranteeing that each organization accesses only the information that corresponds to it according to its permissions.

Context of Use

This panel is operated by:

- **Users of participating organizations:** To log in at the end of the monthly/annual cycle and download their official participation certificates and analytical performance reports.
- **Platform Administrators:** To upload and publish report PDF files (individually or through the bulk processor per mapping file).

Possible Actions

1. Consult and Download Individual Reports

In the **Individual report** tab, the participant views the list of events in which they have been enrolled. You can search by event name or round code.

Laboratorios > Reportes

Informe Individual

Interpretación del Informe

Buscar

🔍

Cargue masivo reporte de participación

Agregar reporte de participación

Participant ID	Alias del laboratorio	Evento	Fecha de registro	Acciones
10000B	Colsanitas	220101	14-09-2024	📄 🗑️
10068B	LA MERCED/ CALLE 122	210301	14-09-2024	📄 🗑️
10542E	Diagnosticar	250303	08-10-2025	📄 🗑️
10204A	Escuela Naval De Suboficiales Barranquilla	200301	14-09-2024	📄 🗑️
10253A	Policia Barranquilla	210301	14-09-2024	📄 🗑️
10059B	Cafam	200301	14-09-2024	📄 🗑️
10495C	Laboratorio Judy Andrea Diaz	240202	14-09-2024	📄 🗑️

2. Upload an Individual Report (Administrator)

If you have editing privileges:

- Click **"Add Participation Report"**.

Agregar reporte de participación

- The registration side panel will be displayed:

- **Event:** Select the event and analytical round.
- **Organization / Participant ID:** Indicate which organization and participant number the report belongs to.
- **Organization alias:** Enter the representative name that will appear in the list.
- **Upload file:** Click the clip  and select the PDF file of the report on your computer.

Evento

Evento 1 2025 - Hematología

Organizacion*

Fac Cacom 2

Participant ID*

10228A

Alias de la organización *

s

Cargar archivo

Screenshot 2026-08-24 10.14.55 AM.png

📎

Agregar

Cancelar

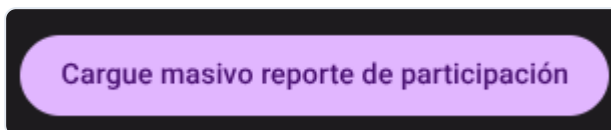
- Click **"Add"** to publish the report.

Agregar

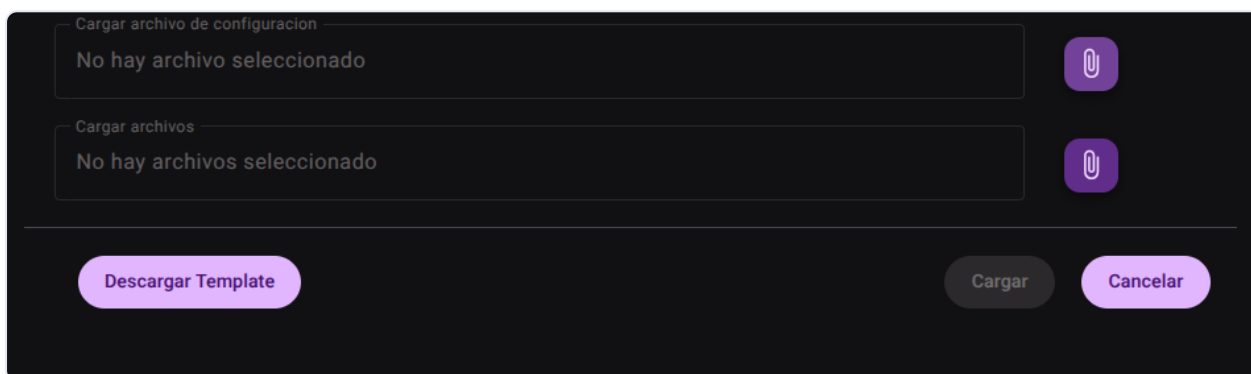
3. Bulk Upload of Reports (Administrator)

To avoid uploading dozens of PDFs one by one:

1. Click "**Bulk Upload**" on the side panel.



2. **Upload configuration file:** Upload a template file (CSV) that maps the PDF file name to the corresponding participant ID.
3. **Upload files:** Select and bulk upload all PDF files corresponding to the round.

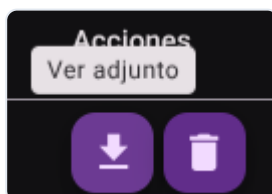


4. Click "**Upload**". The system will automatically distribute the files to each participant according to the mapping matrix provided.

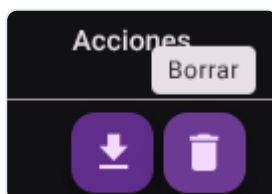


5. See current report attachment.

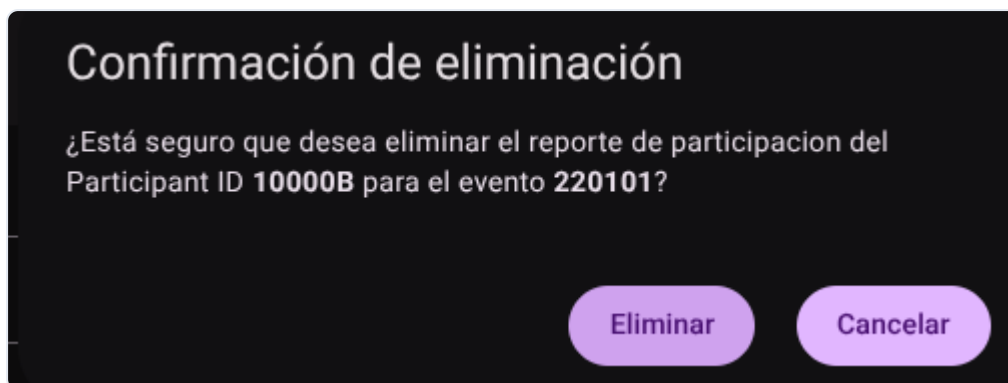
1. To see the report attachment you can click on the **Download** icon in the actions column.



###6. Delete current report. 1.To delete a report you can click on the **Trash** icon in the action column.



2. Confirm the action in the confirmation popup modal.



7. Download Interpretation and General Summary

On the **Report Interpretation** tab:

1. The system presents the list of events classified by areas (e.g. *Uroanalysis, Hematology*).
2. Click on the desired event to display the global summary files and statistical interpretations available for download.

Laboratorios > Reportes

Informe individual			Interpretación del informe									
Buscar												
Año	Archivo	Uroanálisis	Química				Hematología			Molecular		Encuesta de satisfacción
2025	Interpretación informe de desempeño	E1 E2 E3	E1	E2	E3	E4	E1	E2	E3	E4	E1	
2025	Interpretación del informe	E1 E2 E3	E1	E2	E3	E4	E1	E2	E3	E4	E1	
2018	Interpretación informe de desempeño	E1	E1				E1					
2018	Interpretación del informe	E1	E1				E1					
2026	Interpretación informe de desempeño	E1 E2	E1	E2	E3		E1	E2	E3	E1	E2	E1

Roles and Permissions Required

This performance visualization and analysis panel can be consulted by **Auditors**, **Quality Directors** and **Analysts**. The required permissions are:

- **Chart Display:** `ict_graphics_read` , `lv_graphics_read` , `histogram_read` , `peer_group_graphic_read` , `sigma_graphic_read` and `boxplot_graphic_read` .
- **Export and Reports:** `performance_report_read` and `report_statistical_read` to download management summaries and sigma performance reports.

Registration and Entry of Quality Control Results

Description, Purpose and Objective

NOTE: The **Registration and Entry of Results** suite is the daily operational core of the quality area on the Quattrol platform. Its purpose is to capture, validate, statistically analyze and export the analytical results obtained by measuring control materials (control sera), offering two work modalities: detailed and individual entry by **Test** and massive and structured capture by **Analytical Group**.

The main objective of this module is to process and apply in real time the Westgard rules and statistical calculations (Mean, SD, CV%, SDI and Sigma Index) on each saved result, immediately alerting the bacteriologist through visual alerts (⚠️) or rejection sirens (🚨) in case of analytical deviations, thus preventing erroneous results from being reported in patient samples.

Context of Use

This panel is operated in the daily routine of the laboratory by:

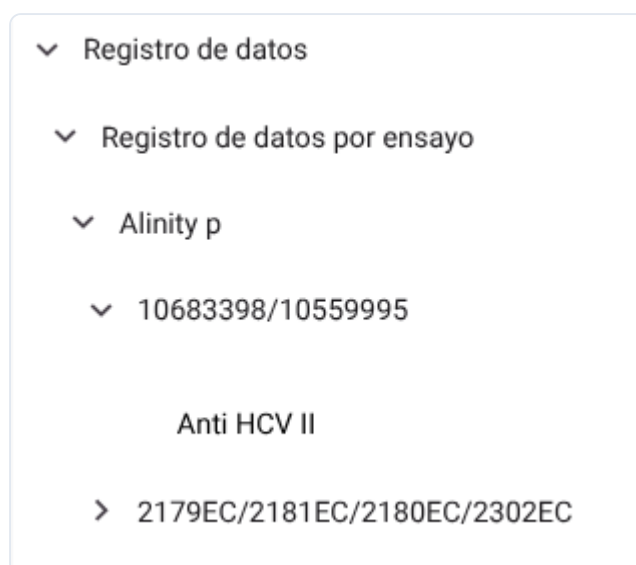
- **Bacteriologists and Instrument Operators:** To record control values at the start of the shift, verify the stability of the analyzer and justify deviations.
- **Quality Coordinators and Directors:** To perform control audits, authorize the manual acceptance of runs rejected by Westgard (overriding), evaluate comparative statistics of Grupo Par and export control logs for regulatory entities.

1. Navigation and Structuring (Left Side Panel)

For ease of access and consistency across the lab, the capture menu is organized hierarchically on the left side panel:

- **Hierarchical Organization:** The modules are grouped according to their physical infrastructure. By expanding the menu of an instrument (e.g. *Alinity p* or *Cobas 6000*), the associated quality control tests are displayed, clearly ordered and showing the nomenclature of the active reagent lot along with its identifying code.
- **View Selection:**
 - **Data recording by trial:** When selecting a specific test within this section, the central panel will be adapted with the control charts, history table and individual capture module for that trial.

- **Data logging by group:** When selecting an analytical group template, the interface will become a massive input matrix for typing multiple tests simultaneously.



2. Submodule: Data Recording by Test

When selecting an individual assay, the interface is divided into three operational sections:

Header Information and Filters

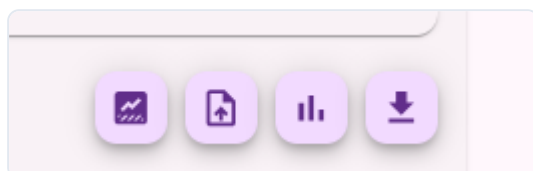
- **Test Metadata:** Displays the selected *Instrument*, *Test* and *Method* of analysis on a fixed card.
- **Filter by Date:** Allows you to delimit the query range (Start Date and End Date) using calendar selectors. Press the **Filter** button (funnel icon ) to update the results history list.

Fecha de registro	Registrado por	Resultado 10683398	Resultado 10559995	Acciones
2026/08/21 10:07:00	Santiago Casallas Galindo	1.000	1.000	   
2026/08/04 14:42:00	Lizeth Daniels Caamano Cruz	106.000	94.100	   
2021/02/27 00:00:00	Duvan Fernando Munoz Lopez	3.000	4.000	   
2021/02/19 00:00:00	Duvan Fernando Munoz Lopez	2.900	3.900	   
2021/02/12 00:00:00	Duvan Fernando Munoz Lopez	2.800	3.800	   
2021/02/05 00:00:00	Duvan Fernando Munoz Lopez	2.700	3.700	   

Analytics and Export Toolbar (Top Right)

The navigation buttons allow you to toggle the type of visual analysis of the selected test:

- **Import results:** Enables bulk import of results using flat data files.
- **Graphs:** Links directly to the interactive view of the **Levey-Jennings Graphs** and Pair Graphs of the essay.
- **Results:** Loads the detailed table view with the chronological measurement log.
- **Histogram:** Generates the frequency distribution of the values to analyze symmetry and dispersion.
- **Export results:** Download the database of visible or filtered records in a **.CSV** format file executable in spreadsheets.



Individual Capture Process (Add result)

1. Click the purple **Add Result** button at the top of the table.
2. An editable form row will be displayed in the first row of the grid:
 - **Registration Date and Time:** Enter the day (calendar) and time (clock) the check was processed.
 - **Registered by:** Automatically displays the name of the logged-in user making the transaction.
 - **Batch X Result:** Enter the numerical values obtained for each batch level configured in the test (e.g. Batch 1, Batch 2).
 - **Comment to:** If you require entering a note, define its scope in the drop-down list (e.g. *All* or a specific batch).
 - **Text field (Comment):** Enter the relevant technical observation (quick auto-complete templates are available).

3. Press the **Save** button (save icon) to confirm inserting the result and processing Westgard. Or press **X** (*Discard*) to void the row.

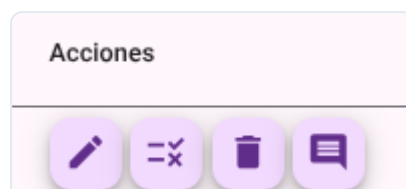


Record History Management (Actions Column)

Each stored result row has direct management options:

- **Edit:** Allows you to correct figures or reagent lots in a previously saved control.

- **Reject / Modify Status:** Allows quality users to apply manual *overriding*, that is, forcing a result to **Manual Rejected** status (excluding it from the statistics) or **Manual Accepted** despite violating automatic rules.
- **Comments:** Opens the complete history of notes associated with the control row and allows new corrective actions to be recorded.
- **Delete:** Irreversibly deletes the analytical record from the laboratory database.



Lower Statistical Analysis Module

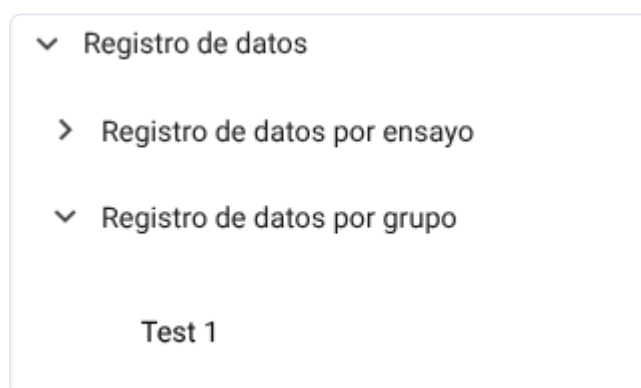
- **My statistics:** Displays in real time the laboratory metrics (*N, Mean, SD, CV%* and *Sigma Index*) calculated for each batch, divided into the **Month/Period** and **Accumulated** tabs.
- **Pair Group:** Shows in parallel the consolidated statistical data of the pair group of participating laboratories that use the same method, batch and period analyzed, facilitating the evaluation of bias.

3. Submodule: Data Registration by Group

For mass matrix entry of complete analytical profiles:

Group Heading and Operating Parameters

- **Identification:** Shows the name of the active **CC Group** (e.g. *Thyroid Profile* or *Basic Chemistry*).
- **General Parameters:** Select the **Registration Date** (calendar) and enter the **Registration Time** (*hh:mm*). This metadata will be automatically replicated across all results in the group. The system displays the user's session as **Registered by**.



Mass Capture Grid

The grid vertically lists all CC Tests linked to the group template:

- **Lot 1 Result / Lot 2 Result:** Enter the value obtained in the numerical cells for each control level of the test.
 - *Tip:* Press the **Enter** key on your physical keyboard to quickly move to the next field down the grid.
- **Comment for:** Choose the lot to which the comment is directed.
- **Enter or select a comment:** Free field or auto-complete template to detail incidents in the group run.

Registro de datos > Registro dato por grupo

Registro de información para:

Nombre: Test 1

Fecha de registro* 24/8/2026

Hora de registro 11:26

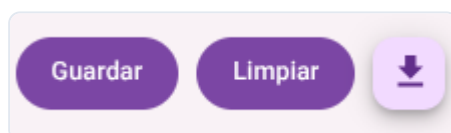
Registrado por: Santiago Casallas Galindo

Guardar Limpiar

Prueba CC	Resultado lote 1	Resultado lote 2	Comentario para	Comentario
Anti HCV II - Alinity p - Quimioluminiscencia - 10683398 - 10559995	10683398*	10559995*	Todos	Ingrese o seleccione un comentario

Control and Exit Buttons

- **Save:** Purple button that processes and inserts in a single block of transactions all the data entered in the matrix towards their respective tests.
- **Clear:** Resets the capture grid cells to zeros to initialize a new entry.
- **Export results:** Top button to download the consolidated group entered in **.CSV** format.



Manual Acceptance and Rejection Criteria (*Overriding*)

WARNING: Risk Management Guidelines for Directors and Quality Coordinators:

- **Manual Acceptance (Overriding to Accepted):** When a result violates a Westgard rule configured as rejection, the system excludes it from the accumulated averages. The director or coordinator can force its acceptance only if it is documented that the alarm was due to a transitory condition without impact on patient samples (e.g. false rejection due to excessively narrow control limit or $\pm 2s$ rule not associated with shift). **It is mandatory to document the technical justification in the Comments field.**
- **Manual Rejection (Preventive Exclusion):** If a control is numerically within $\pm 2s$ but the bacteriologist detects obvious signs of contamination, bubbles, thermal deterioration or clot in the aspiration needle, he must mark the data as **Manual Rejection**. This prevents an artificially altered measurement from contaminating the analyzer's monthly mean and standard deviation.

Roles and Permissions Required

The roles enabled to record, report and validate control data on the platform are **Bacteriologist / Laboratory Analyst**, **Instrument Operator** and **Director / Quality Coordinator**. The specific system permissions required to interact with these views are:

- **Essay Results Operation:**
 - `data_entry_read` : Allows reading access to the results log per test, temporal filters and visualization of local statistics.
 - `data_entry_create` : Enables the insertion of new analytical records and the addition of corrective action comments in the history.
 - `data_entry_update` : Enables correction and editing of previously saved results within the authorized shift.
 - `data_entry_delete` : Grants privileges to physically delete analytical records from the log.
 - `data_entry_manually_reject` (Reserved for Directors/Coordinators): Allows you to force the validation status (Manually Accepted/Rejected) by overwriting the automatic Westgard multi-rules.
 - `data_entry_export` : Allows you to export and download the filtered analytical log in `.CSV` format.
- **Results Operation by Group (Matrix Capture):**
 - `data_entry_group_read` : Allows access to the matrix interface and visualization of the configured analytical group profiles.
 - `data_entry_group_create` : Authorizes bulk saving of captured results in the grid and use of the form cleanup function.
- `data_entry_group_export` : Enables the download of the consolidated analytical group in `.CSV` format.