zymDev

SOFTWARE FACTORY

POQTROL

POQTROL External Quality Assessment / Quality Control for Rapid Tests (PoCT) for HIV, HBsAg, HCV and Syphilis.

Official User Manual

zymDev Core Platform v5.5.2

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Table of Contents

POQTROL External Quality Assessment / Quality Control for Rapid Tests (PoCT) for HIV, HBsAg, HCV and Syphilis.

📥 **Download:** Download User Manual in PDF

📚 Available Modules & Functionalities

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

📁 System Configurations

View	Submodule	Description	Link
Manufacturer Means & SD	-	The Manufacturer Means and Standard Deviations view is the module in charge of consulting, recording, exporting and managing the m...	Open Manual

📁 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
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

View	Submodule	Description	Link
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

View	Submodule	Description	Link
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
Competency Assessment	Formularios	The Competency Assessment Entry console is the operational interface designed to formally capture, complete and record the technic...	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
Glucometers Quality Control	Formularios	The Glucometer Quality Control console is the operational interface designed to capture, validate and record quantitative test res...	Open Manual
Hematology Results Entry	Formularios	The Hematology Results Entry console is the specialized interface designed to capture, validate and record the numerical and metho...	Open Manual

View	Submodule	Description	Link
Reports & Certificates	-	The Download Reports and Certificates view is the final module of the proficiency testing and external quality control (PEEC) prog...	Open Manual
Satisfaction Survey	Formularios	The Satisfaction Survey view is the qualitative module in charge of collecting, structuring and evaluating the perception of users...	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

Manufacturer Means and Standard Deviations

Description, Purpose and Objective

> **NOTE:** The **Manufacturer Means and Standard Deviations** view is the module in charge of consulting, recording, exporting and managing the manufacturer Means and Standard Deviation (SD) parameters assigned by certificate.
>
> A **Media / Manufacturer SD** record contemplates the following key parameters:
>
> - **Instrument:** Selected equipment or analyzer.
> - **Version:** Associated program or event.
> - **Batch and Cycle:** Identification of the control batch and evaluation cycle.
> - **Mean Assigned by Certificate:** Theoretical target value declared in the official insert or certificate.
> - **SD Assigned by Certificate:** Theoretical dispersion declared by the manufacturer.
>
> The objective of this module is to define the theoretical baseline assigned by certificate to compare the analytical performance obtained against the commercial parameters of the control input.

Context of Use

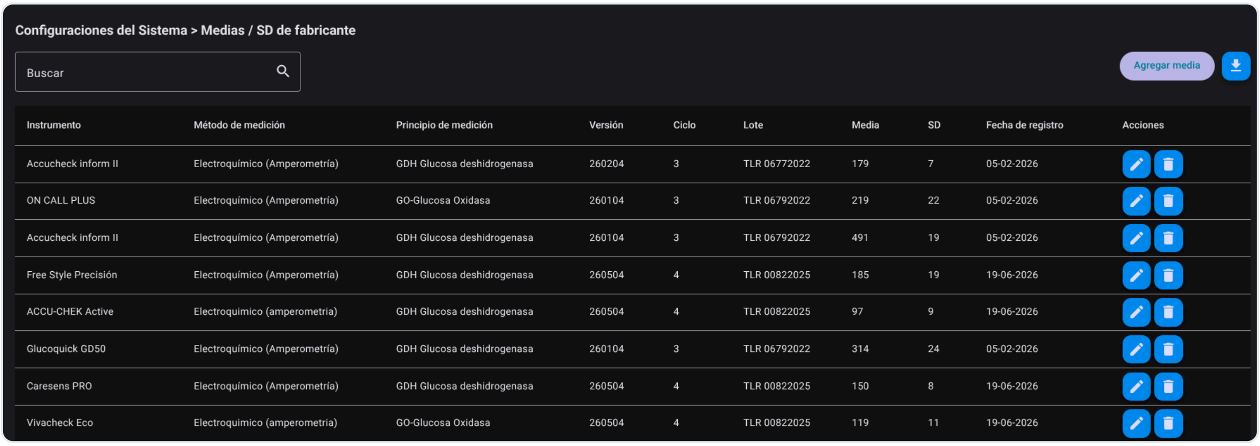
This module is used by technical directors and analytical coordinators to:

- **Record theoretical parameters:** Assign the Mean and SD values declared in the manufacturer's certificate.
- **Export and audit theoretical values:** Generate consolidated reports of current insert parameters.

Possible Actions

1. Consult and Filter Records

1. Use the search bar (**Search**) to locate specific data for means or deviations.
2. Click on the column headers (**Instrument**, **Version**, **Cycle**, **Batch**, etc.) to toggle the table sorting ascending or descending.
3. The table updates its values and order in real time after applying filters or changing the order of the columns.

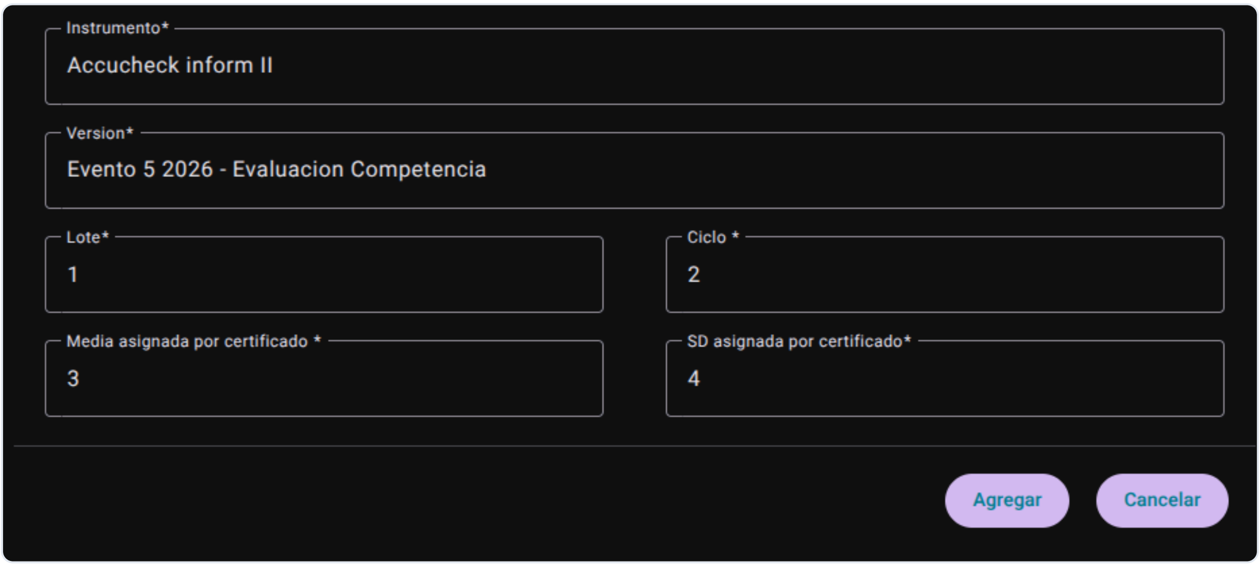


Instrumento	Método de medición	Principio de medición	Versión	Ciclo	Lote	Media	SD	Fecha de registro	Acciones
Accucheck inform II	Electroquímico (Amperometría)	GDH Glucosa deshidrogenasa	260204	3	TLR 06772022	179	7	05-02-2026	
ON CALL PLUS	Electroquímico (Amperometría)	GO-Glucosa Oxidasa	260104	3	TLR 06792022	219	22	05-02-2026	
Accucheck inform II	Electroquímico (Amperometría)	GDH Glucosa deshidrogenasa	260104	3	TLR 06792022	491	19	05-02-2026	
Free Style Precisión	Electroquímico (Amperometría)	GDH Glucosa deshidrogenasa	260504	4	TLR 00822025	185	19	19-06-2026	
ACCU-CHEK Active	Electroquimico (amperometria)	GDH Glucosa deshidrogenasa	260504	4	TLR 00822025	97	9	19-06-2026	
Glucoquick GD50	Electroquímico (Amperometría)	GDH Glucosa deshidrogenasa	260104	3	TLR 06792022	314	24	05-02-2026	
Caresens PRO	Electroquímico (Amperometría)	GDH Glucosa deshidrogenasa	260504	4	TLR 00822025	150	8	19-06-2026	
Vivacheck Eco	Electroquimico (amperometria)	GO-Glucosa Oxidasa	260504	4	TLR 00822025	119	11	19-06-2026	

2. Register New Media / Manufacturer SD

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

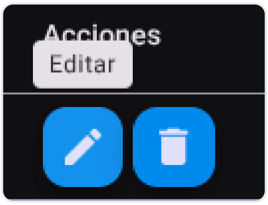
2. In the side form that is displayed, fill out the required fields:
   - **Instrument*** (select equipment from drop-down menu).
   - **Version*** (select the associated program or event).
   - **Lot***
   - **Cycle***
   - **Average assigned per certificate***
   - **SD assigned by certificate***



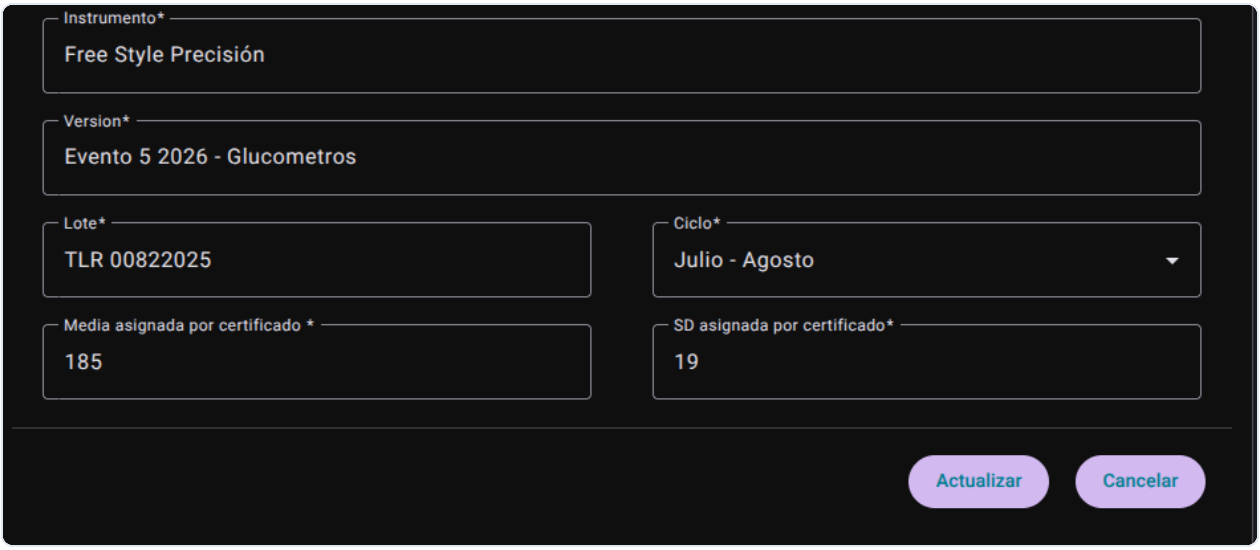
3. Press the **"Add"** button to save the settings (or **"Cancel"** to close the panel without keeping the changes).

3. Edit an Existing Record

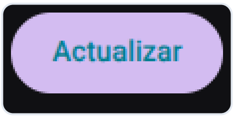
1. In the corresponding record row within the main table, locate the **Actions** column. Click the edit button (**Edit**, pencil icon).



3. Open the side panel with the loaded information to modify the batch, cycle, assigned mean, or assigned SD values.

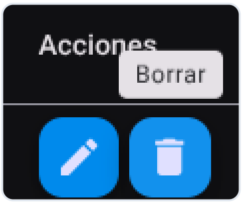


4. Press **"Refresh"** to update the log in real time.

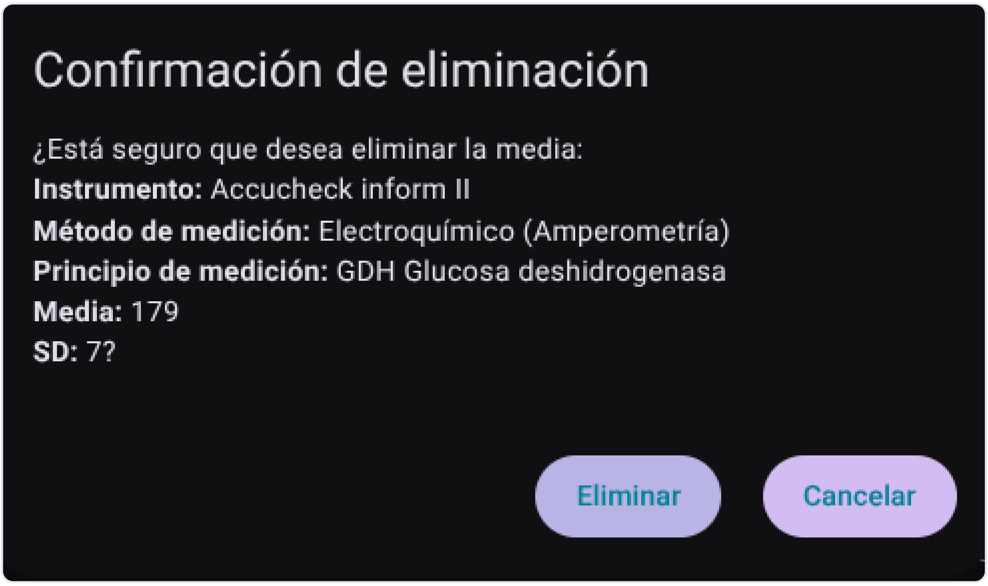


4. Delete a Record

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

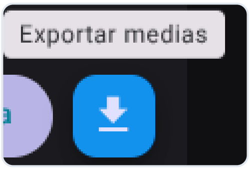


2. Confirm the action to permanently delete the selected record from the system.



5. Export Manufacturer Stockings

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



2. The file `.CSV` with the consolidated report of the registered averages will be downloaded directly.

Roles and Permissions Required

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

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

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

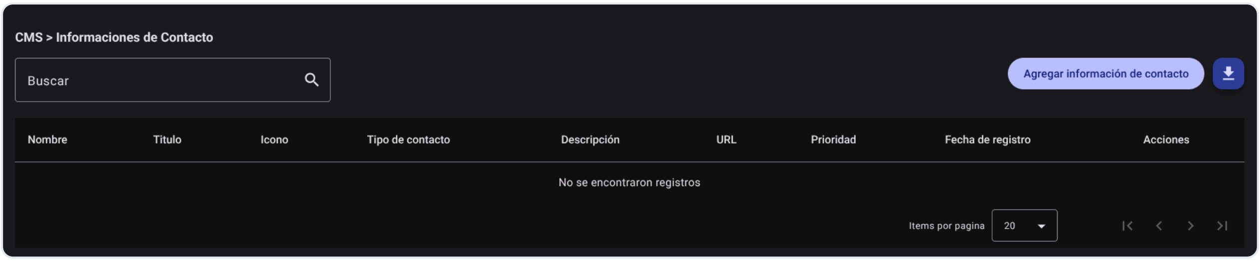
This module is used by:

- **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

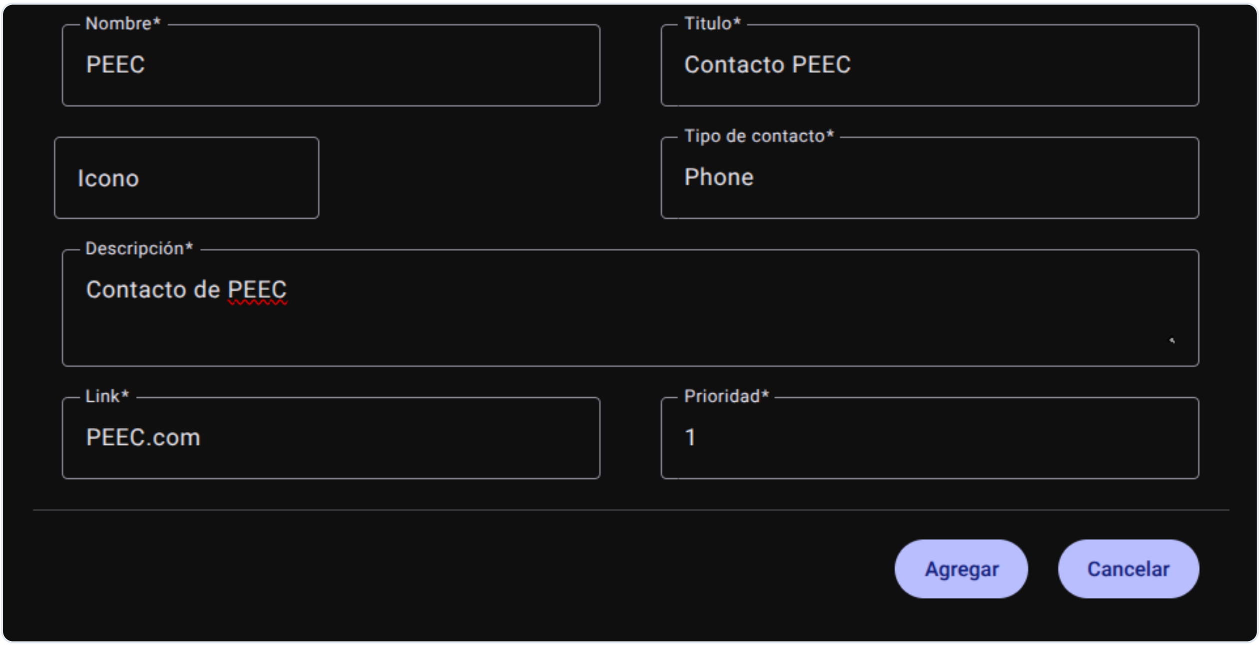
1. In the main administration table, display the contact channels with the columns: Name, Title, Icon, Contact Type, Description, URL, Priority, Registration Date and Actions.
2. Use the **"Search"** field to filter channels by type (e.g. WhatsApp, Email), name or description.
3. Sort the rows according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



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.

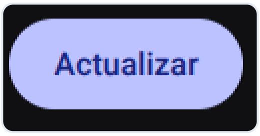


3. Save the record by clicking **"Save"**.

3. Edit a Contact Channel

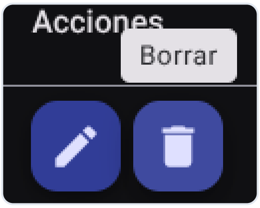
1. Locate the channel in the table and click the edit button (pencil icon✏️) in the actions column.

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

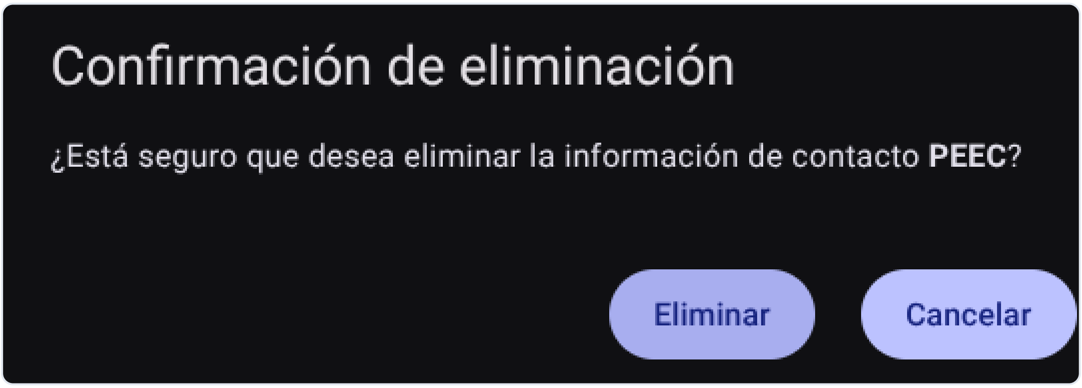


4. Delete a Contact Channel

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

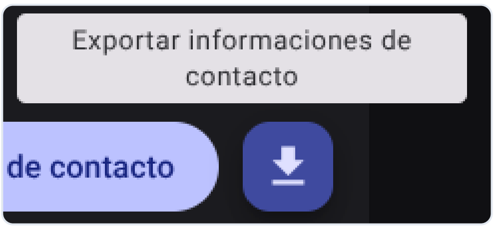


2. Confirm the action.



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.

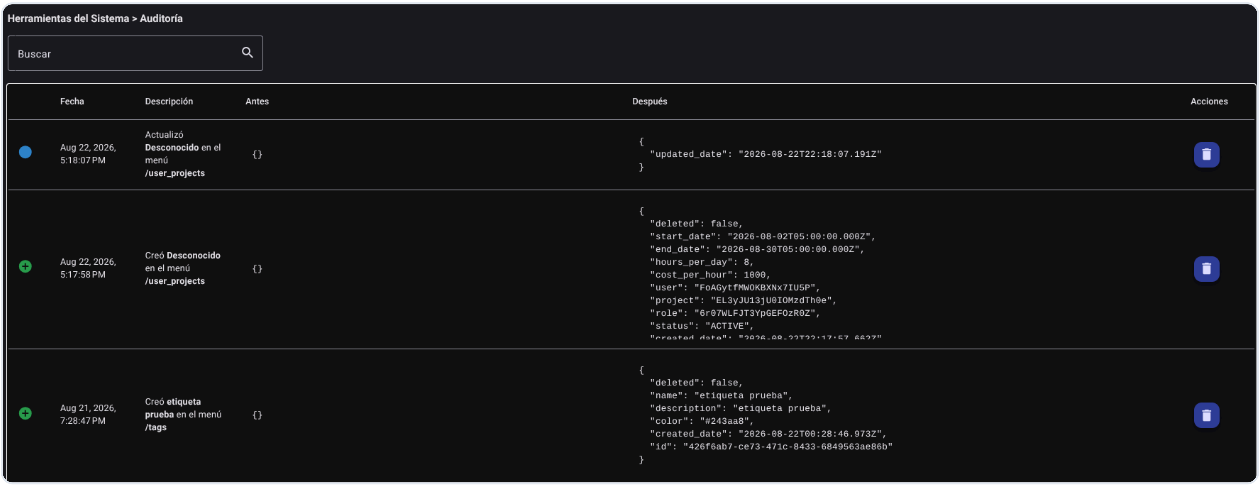
Possible Actions

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:

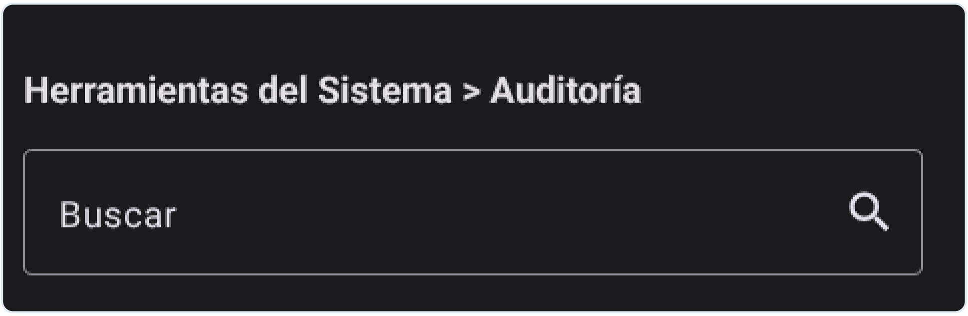
- **Visual Indicator:** A colored icon that summarizes the category of the operation:
  - **Green:** Creation of a new element.
  - **Blue:** Modification of an existing record.
  - **Red:** Deletion of system information.
- **Date:** Exact timestamp (day, month, year and hour) when the action was executed.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



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.

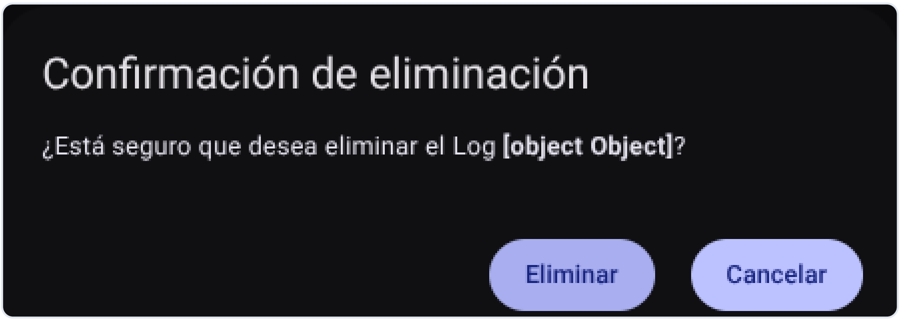


3. Delete a Log Record (If applicable)

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:

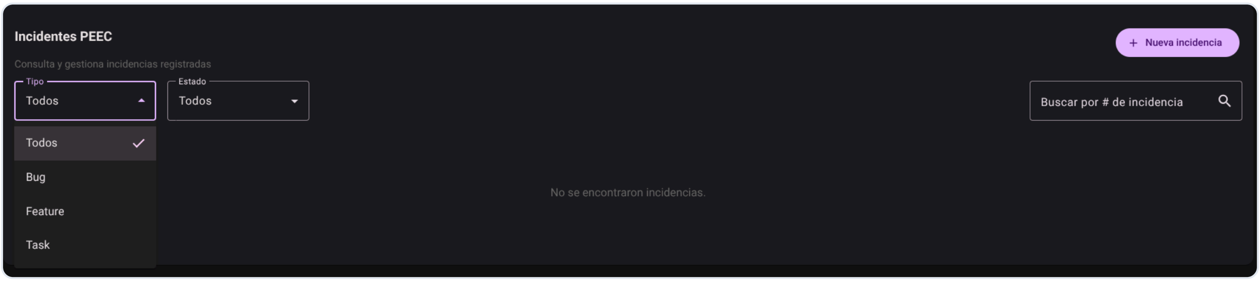
- **Users or Organization Operators:** To report technical non-conformities, screen errors or request improvements.
- **Technical Support Agents and Developers:** To audit, diagnose and track the progress of the registered ticket.

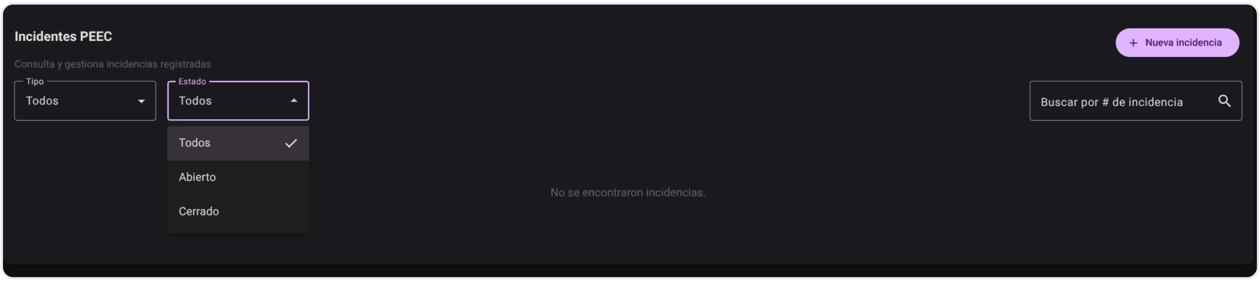
Possible Actions

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*).

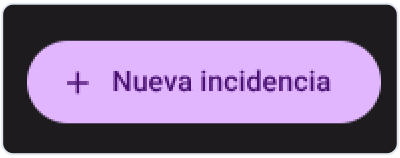
2. Enter the code in the **"Search by Issue #"** field to find a specific ticket and check the progress status of its review.



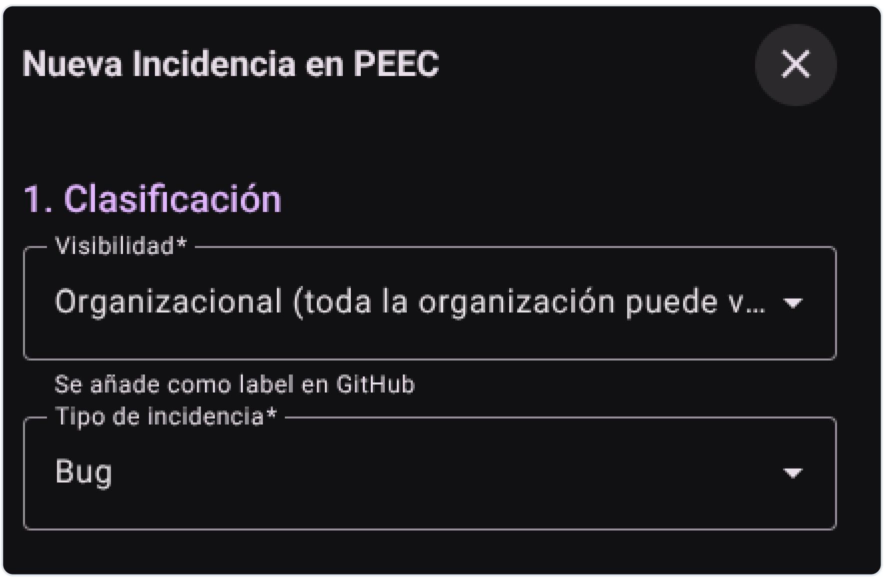


2. Register a New Incident

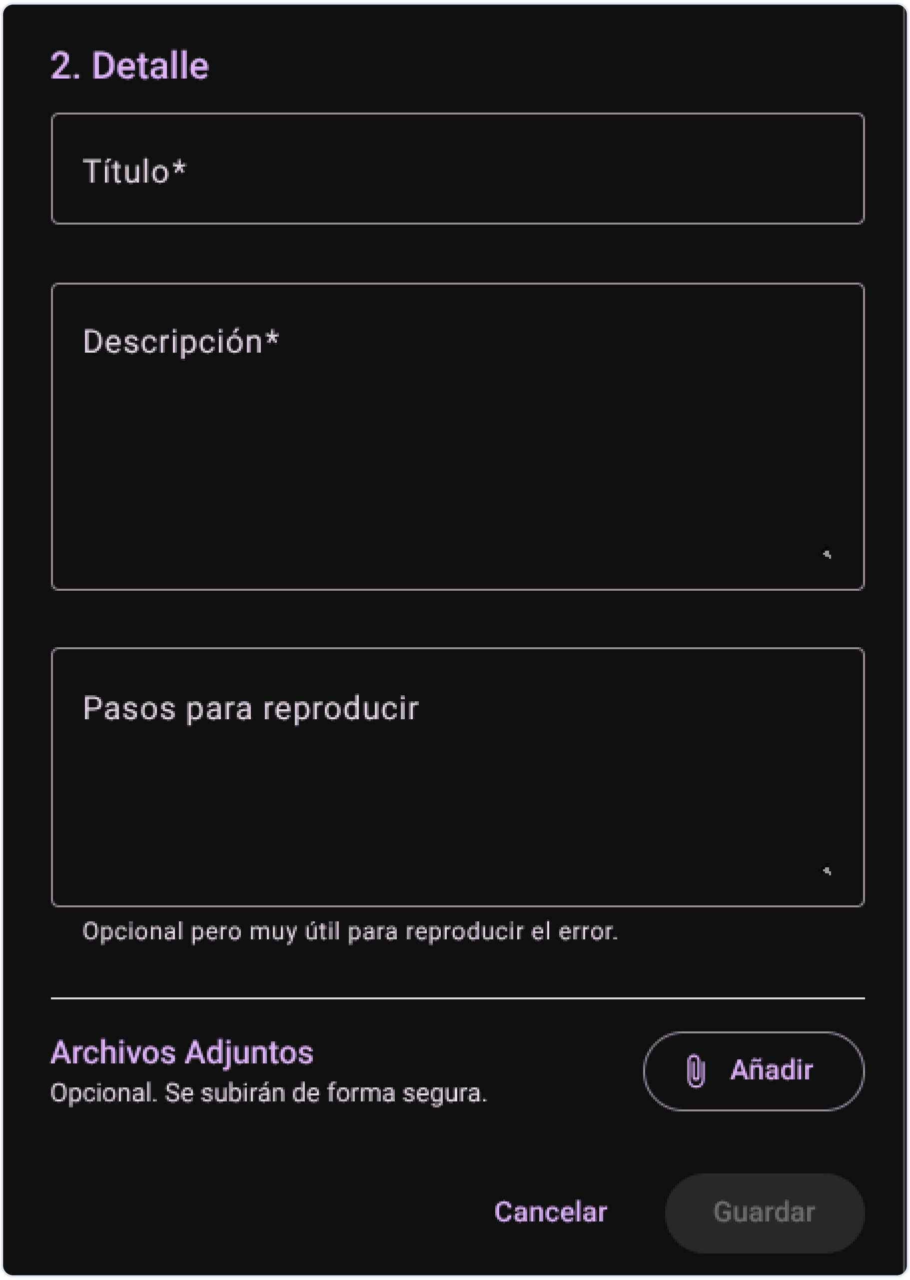
1. Click the *++New Incident"** button located in the upper right corner.



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).



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.



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

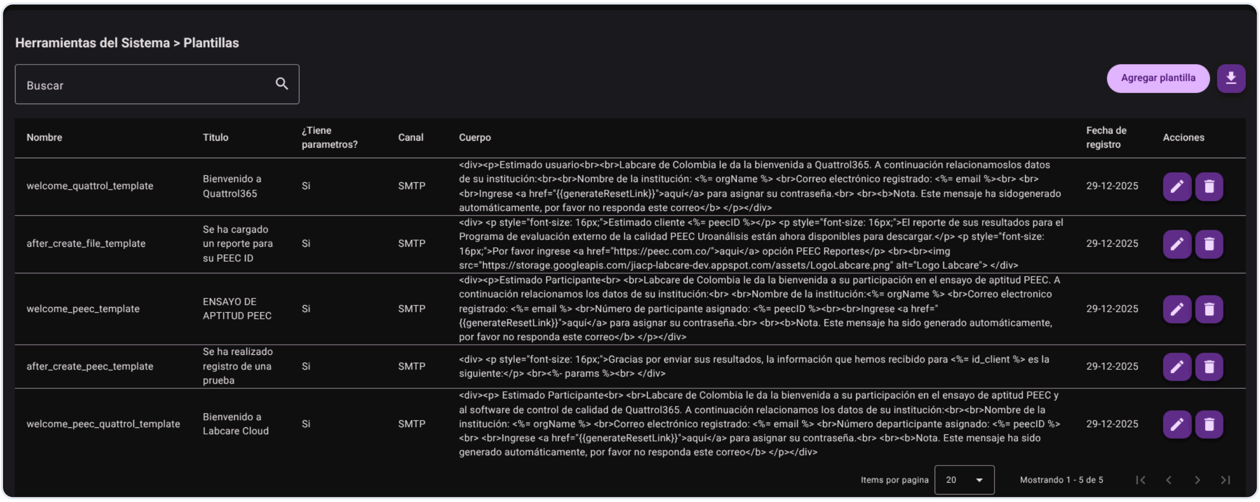
This module is used by Product Managers to:

- **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.

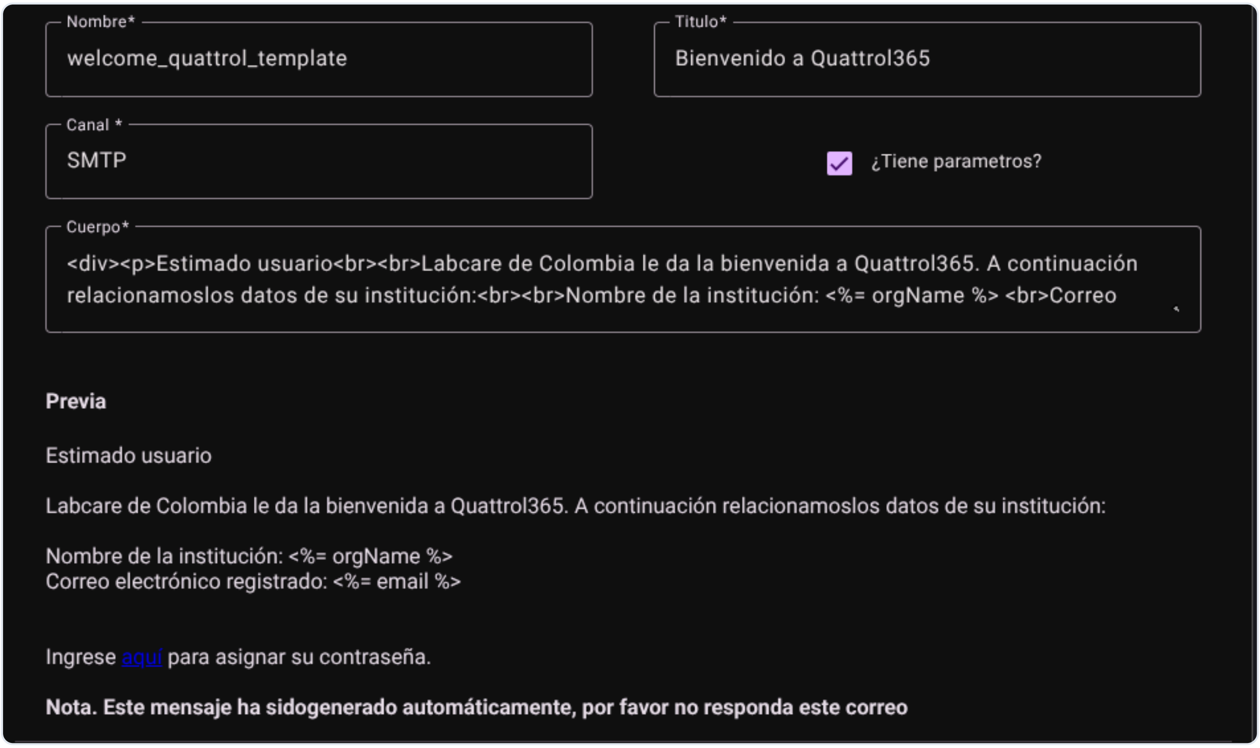


2. Add a New Template

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.

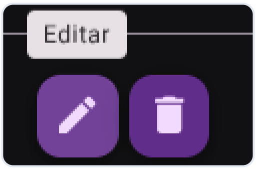


3. Click **"Add"** to register the template.

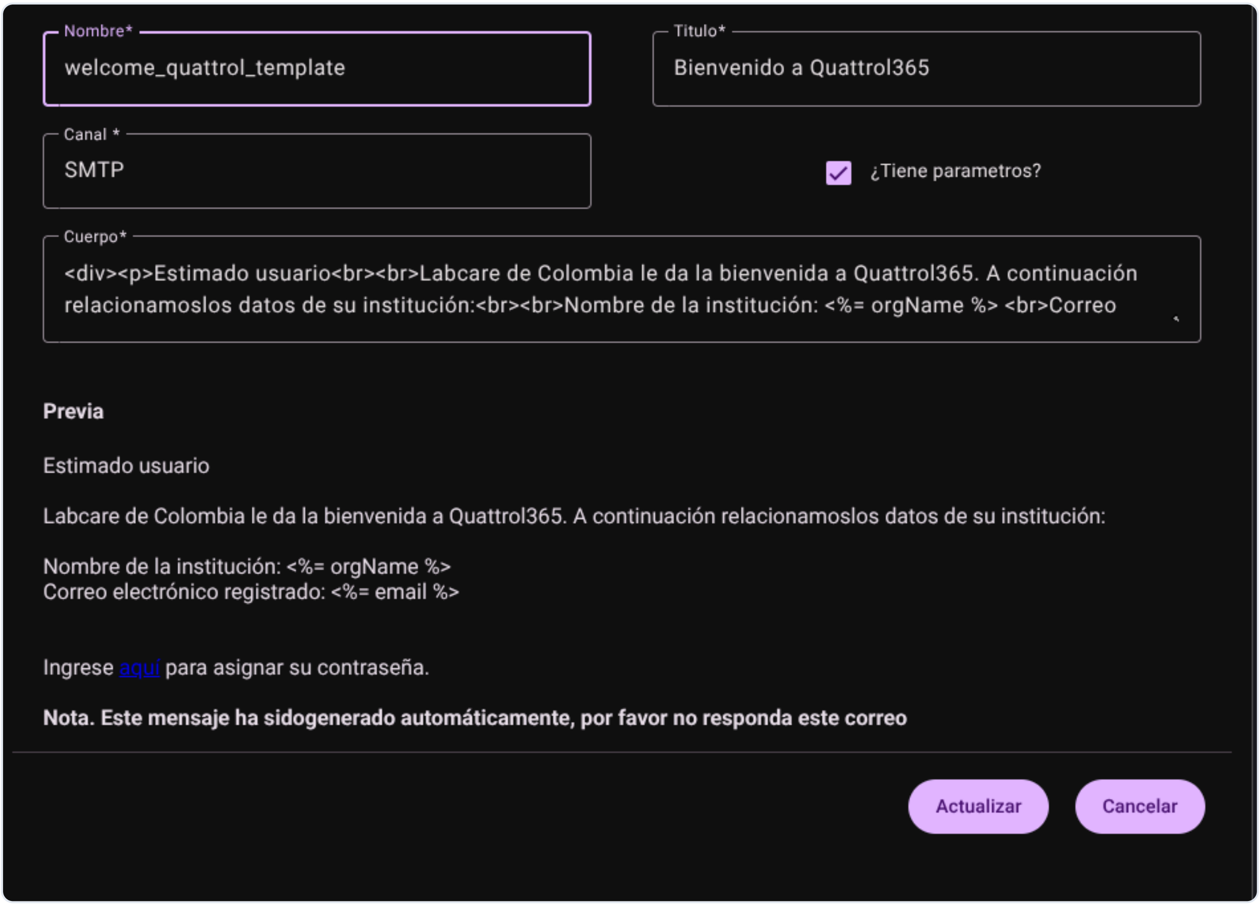
3. Edit a Template

To modify the layout or subject of a saved template:

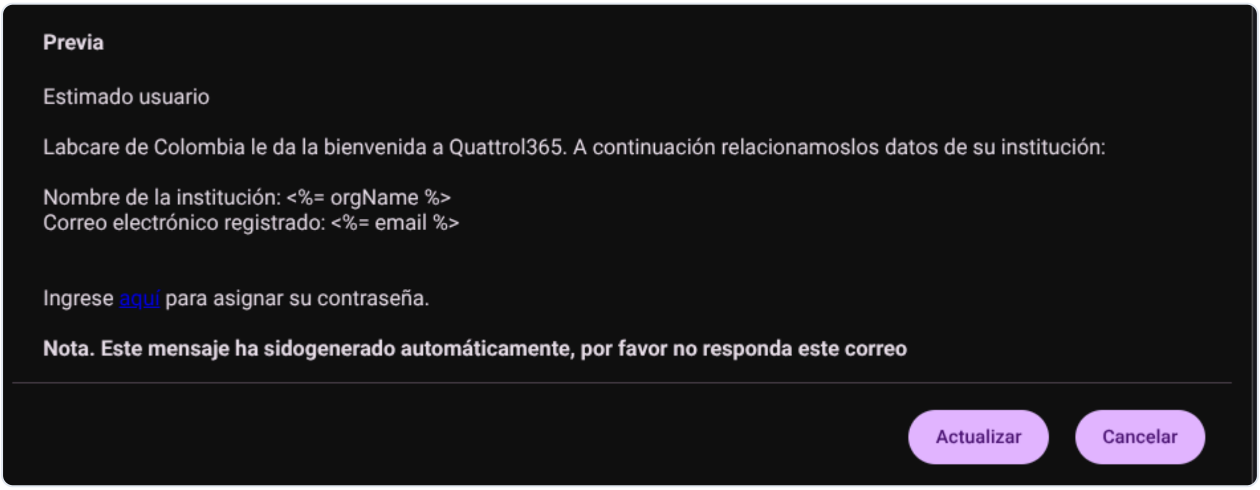
1. Find the corresponding record and click **"Edit"** (pencil icon ✏️).



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



3. Use the interactive preview to validate your changes.

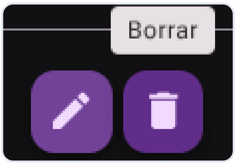


4. Click **"Update"** to apply the changes immediately to system notifications.

4. Delete a Template

To permanently delete a template:

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

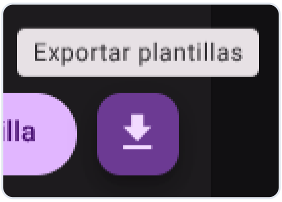


2. confirm the action in the popup modal.

> **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:

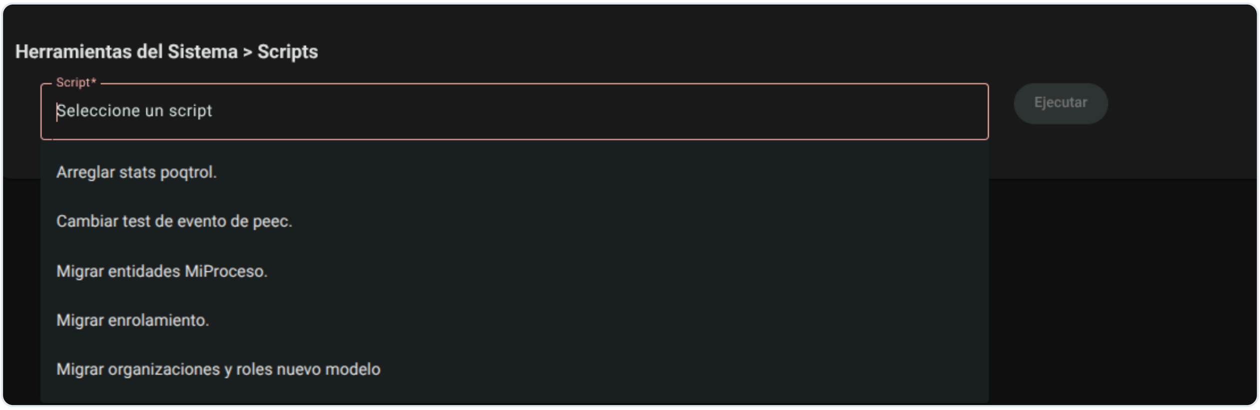
- **Fix massive inconsistencies:** Repair damaged or orphaned records generated by random network failures.
- **Recalculate reports:** Force manual recalculation of metrics on historical quality events.
- **Hot Updates:** Run database patches directly from the administration web frontend securely.

Possible Actions

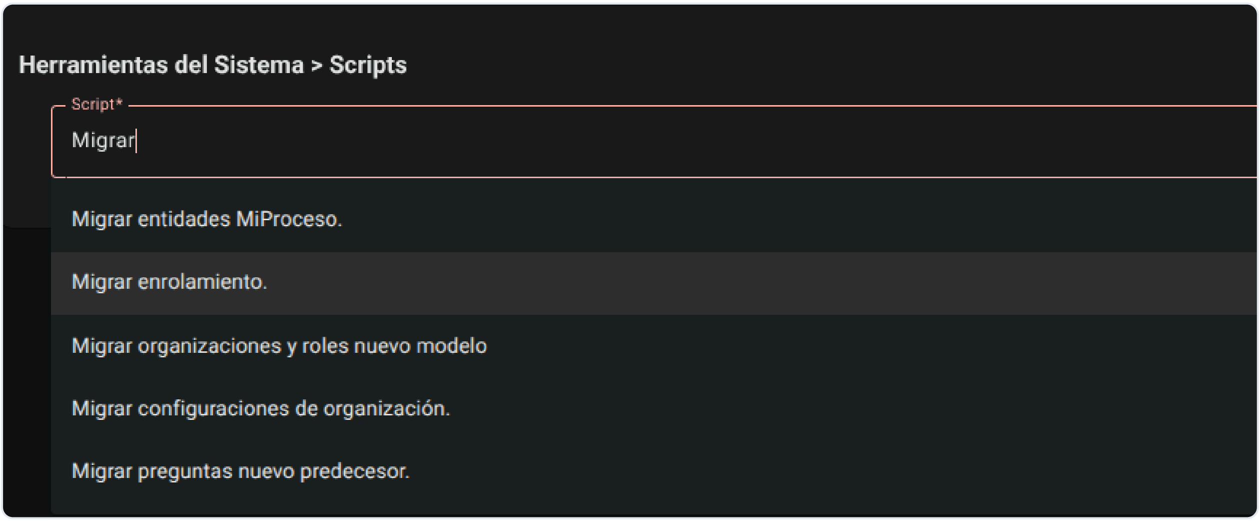
1. Select a Script from the Gallery

The system has a catalog of predefined scripts.

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

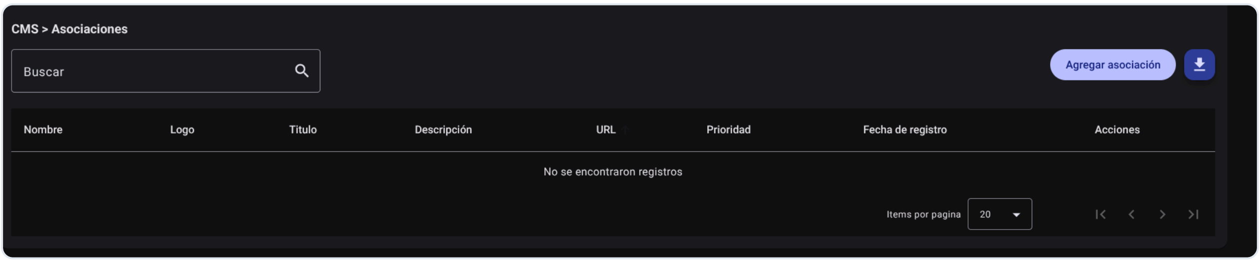
This module is used by:

- **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:

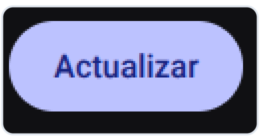
- **Name of Ally:** Commercial or institutional identifier of the entity.
- **Title:** Slogan or short title of the alliance.
- **Logo (URL / File):** Direct link or upload of the official logo.
- **Description:** Brief summary of the benefits or scope of the agreement.
- **Destination URL:** Official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

3. Click **"Add"**.

3. Edit or Delete an Association

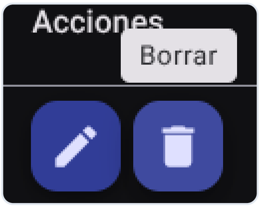
1. Locate the association in the table and click the edit button (pencil icon✏️) in the actions column.

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

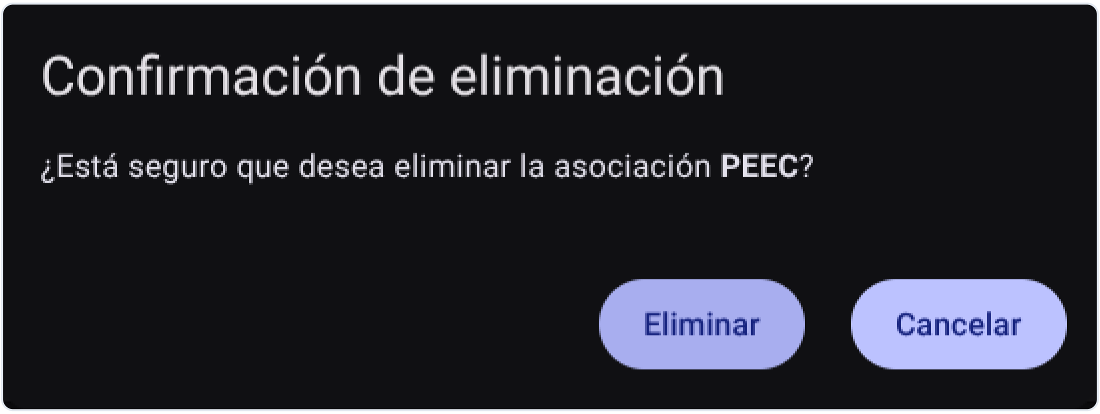


4. Delete an Association

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

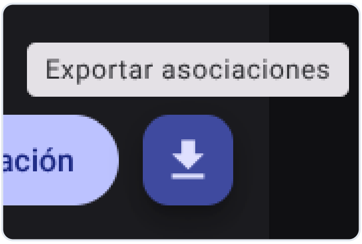


2. confirm the action.



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

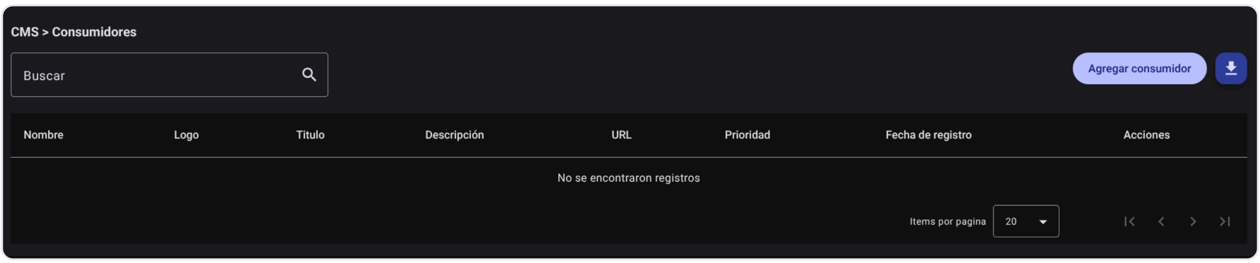
This module is used by:

- **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

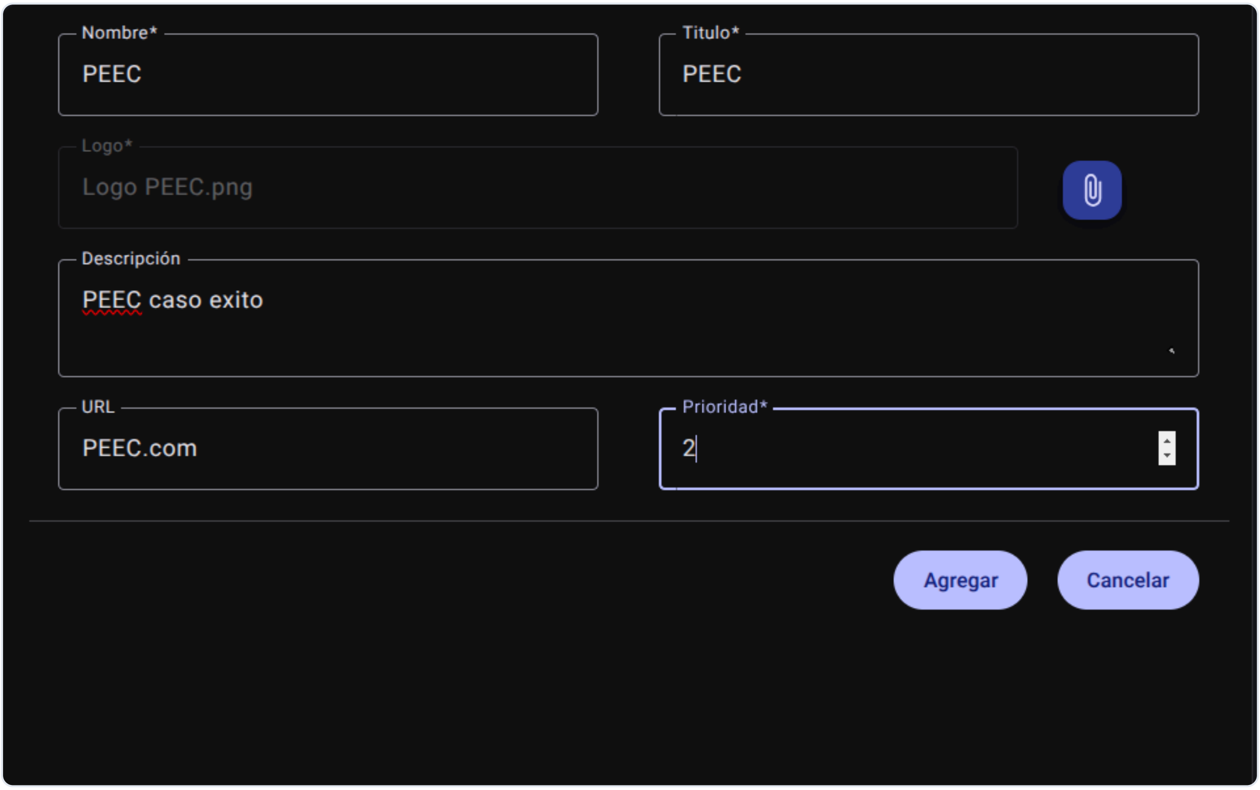
1. Consult the List of Consumers and Clients

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

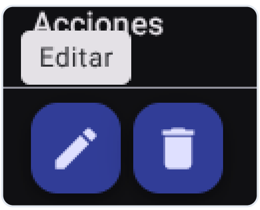
1. Click the **"Add Consumer"** button.
2. Fill in the requested information on the side panel:
   - **Name:** Company name or commercial name of the client.
   - **Title:** Descriptive heading or title of the reference.
   - **Logo (URL / File):** Official logo link or upload.
   - **Description:** 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.



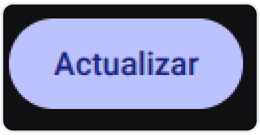
3. Click **"Add"**.

3. Edit or Delete a customer

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

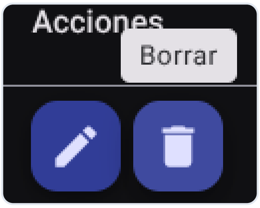


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a consumer

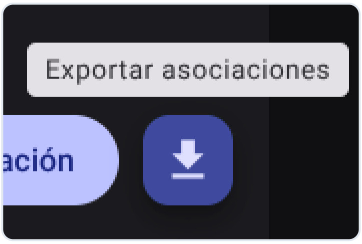
1. To unsubscribe a consumer, use the delete button (trash can icon) in the actions column.



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

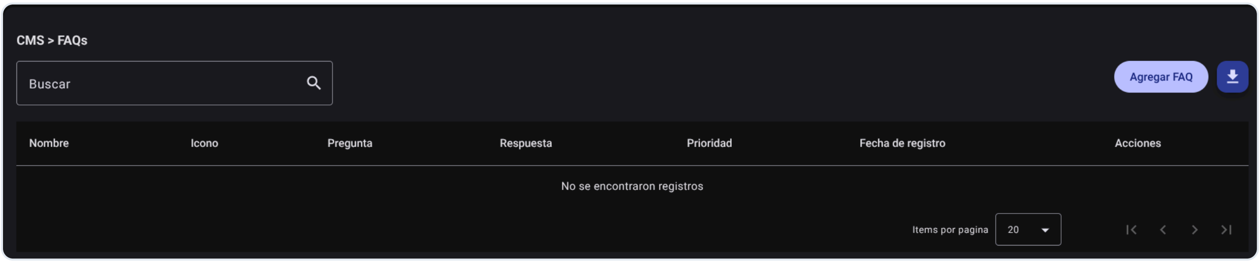
This module is used by:

- **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

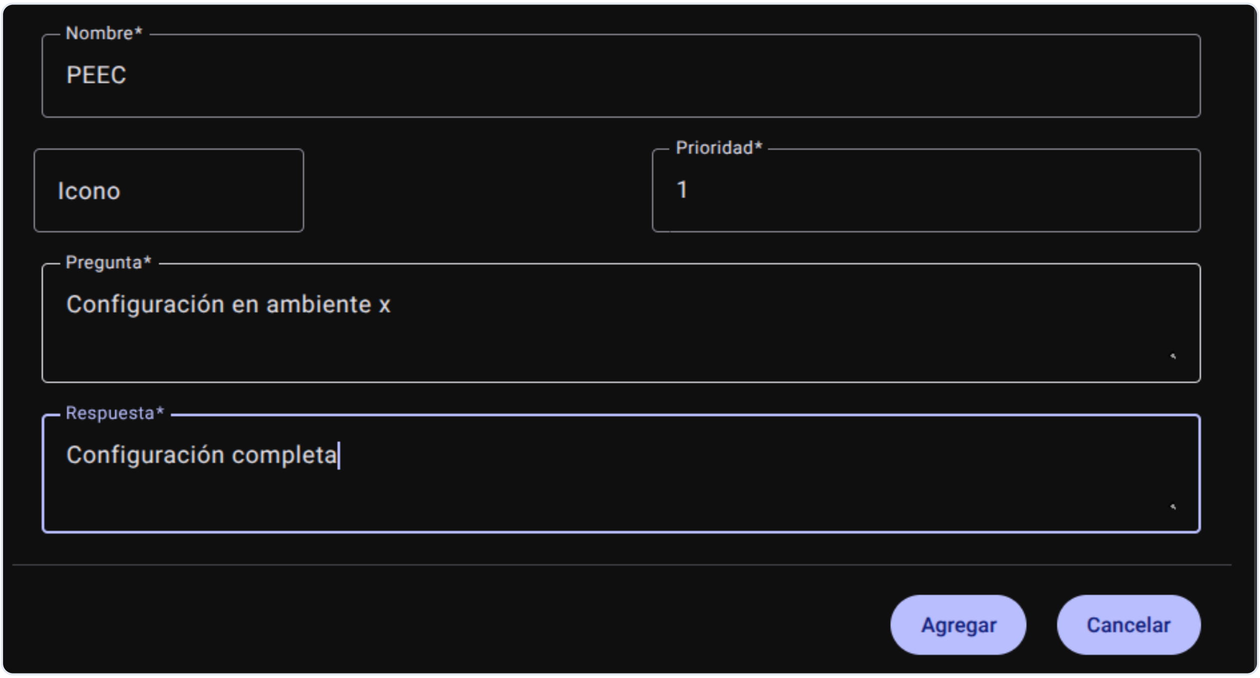
1. In the main FAQs table, view the records stored with the columns: Name (Category), Icon, Question, Answer, Priority, Record Date and Actions.
2. Use the **"Search"** field to filter questions or answers by keywords.
3. Sort columns by topic or display priority.



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.

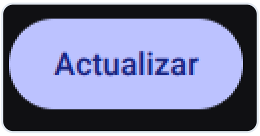


3. Click **"Add"**.

3. Edit an FAQ

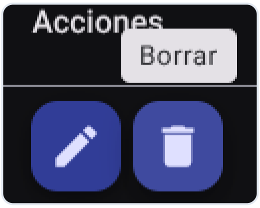
1.Locate the FAQ in the table and click the edit button (pencil icon✏️) in the actions column.

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

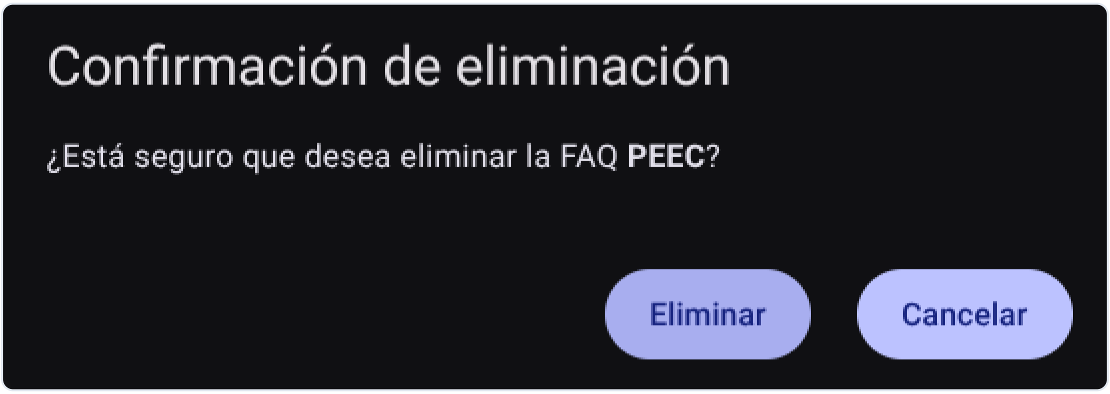


4. Delete an FAQ

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

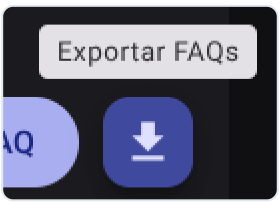


2. confirm the action.



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

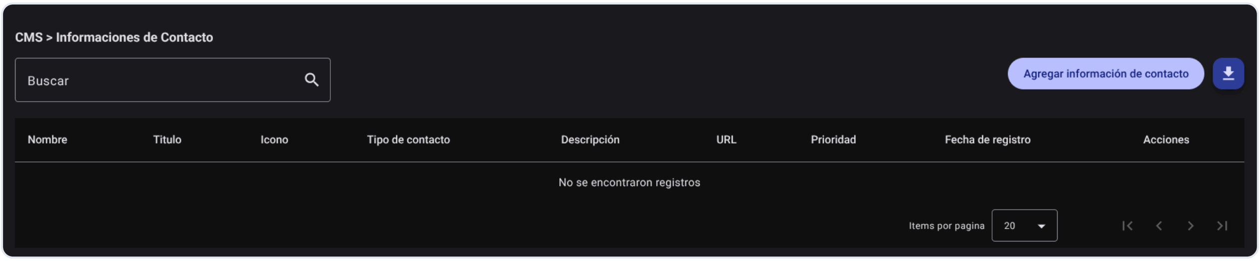
This module is used by:

- **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

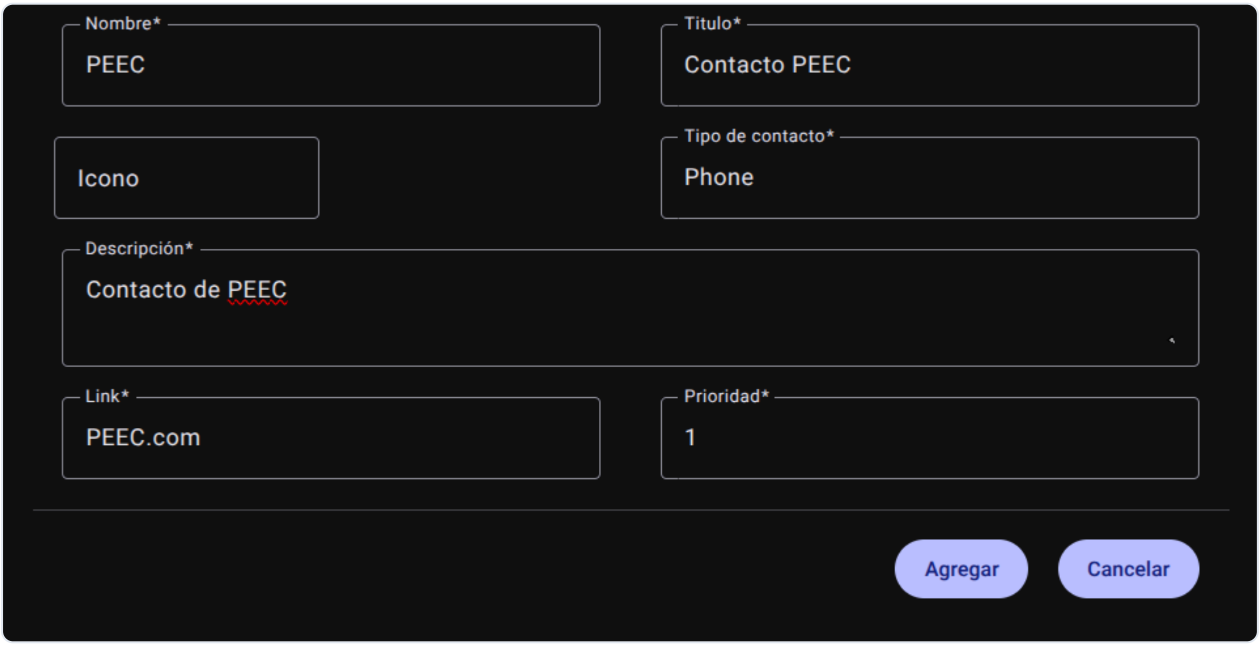
1. In the main administration table, display the contact channels with the columns: Name, Title, Icon, Contact Type, Description, URL, Priority, Registration Date and Actions.
2. Use the **"Search"** field to filter channels by type (e.g. WhatsApp, Email), name or description.
3. Sort the rows according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



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.

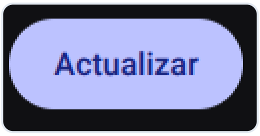


3. Save the record by clicking **"Save"**.

3. Edit a Contact Channel

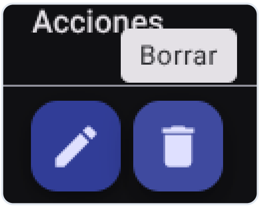
1. Locate the channel in the table and click the edit button (pencil icon✏️) in the actions column.

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

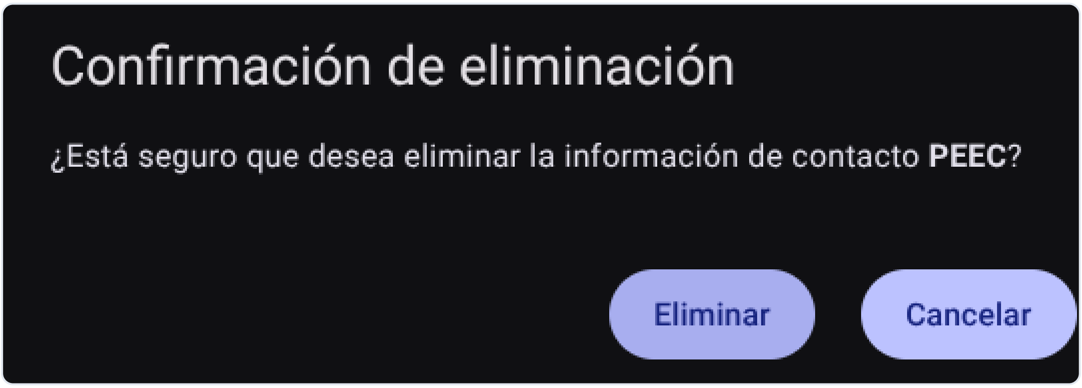


4. Delete a Contact Channel

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

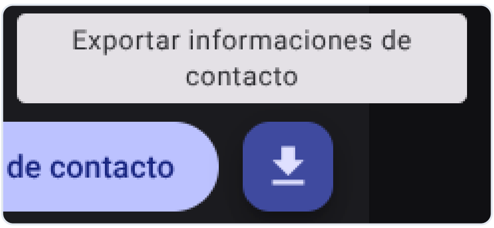


2. confirm the action.



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

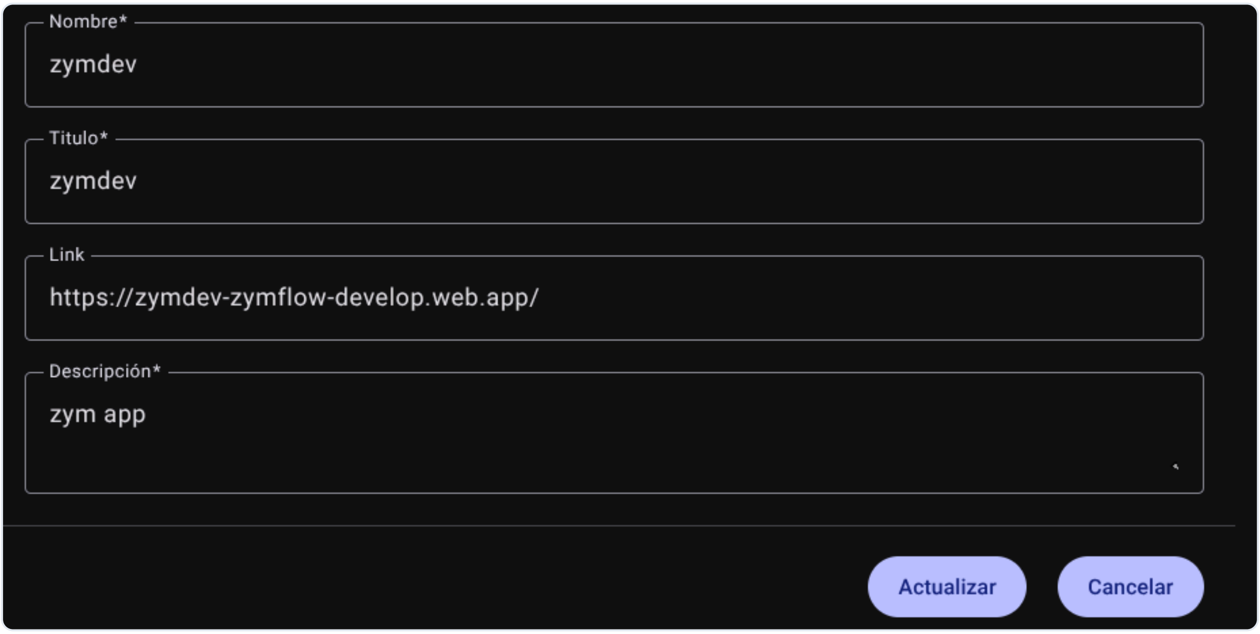
1. View Current Institutional Information

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.

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).



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"**.

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

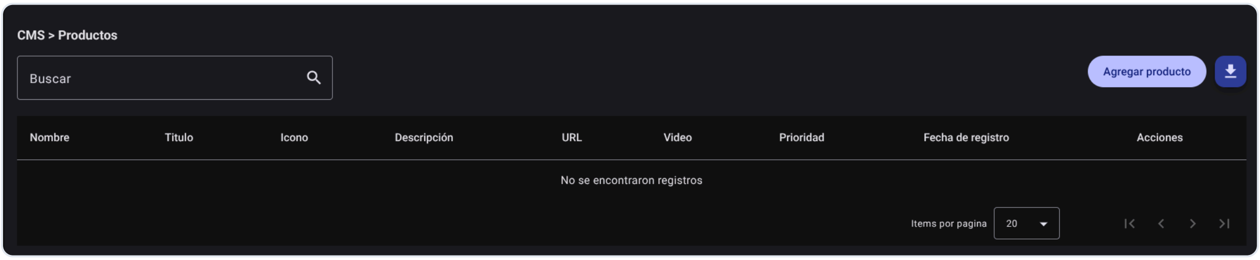
This module is used by:

- **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

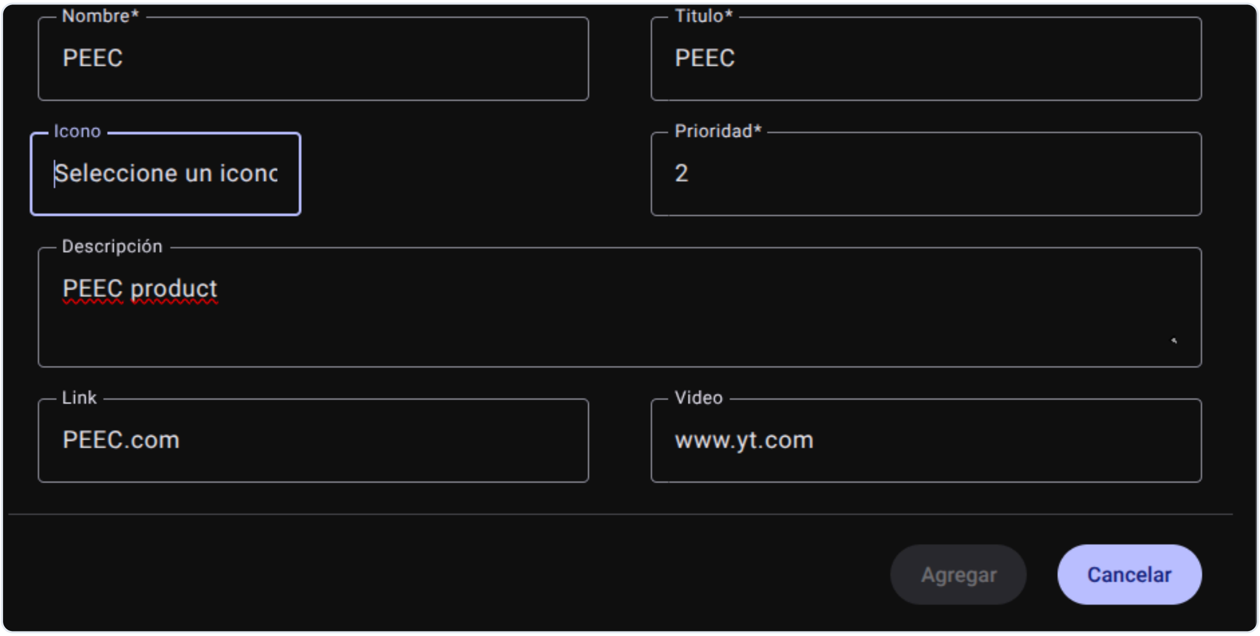
1. In the product management table, review the columns: Name, Title, Icon, Description, URL, Video, Priority, Registration Date, and Actions.
2. Filter using the **"Search"** text box for any product term.
3. Sort the rows by display priority or by creation date.



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.

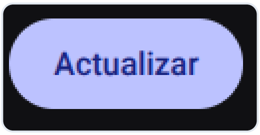


3. Click **"Add"**.

3. Edit a Product

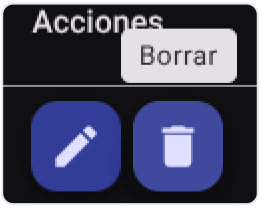
1. Locate the product in the table and click the edit button (pencil icon✏️) in the actions column.

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



4. Delete a Product

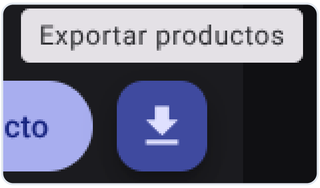
1. To delete a product, use the delete button (trash can icon 🗑️) in the actions column.



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

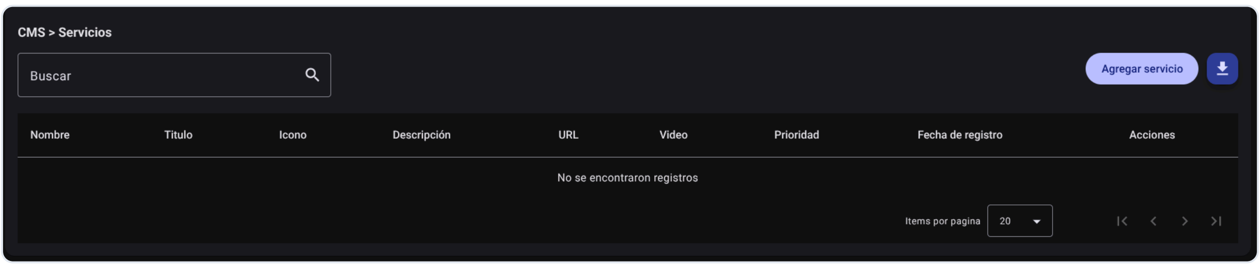
This module is used by:

- **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

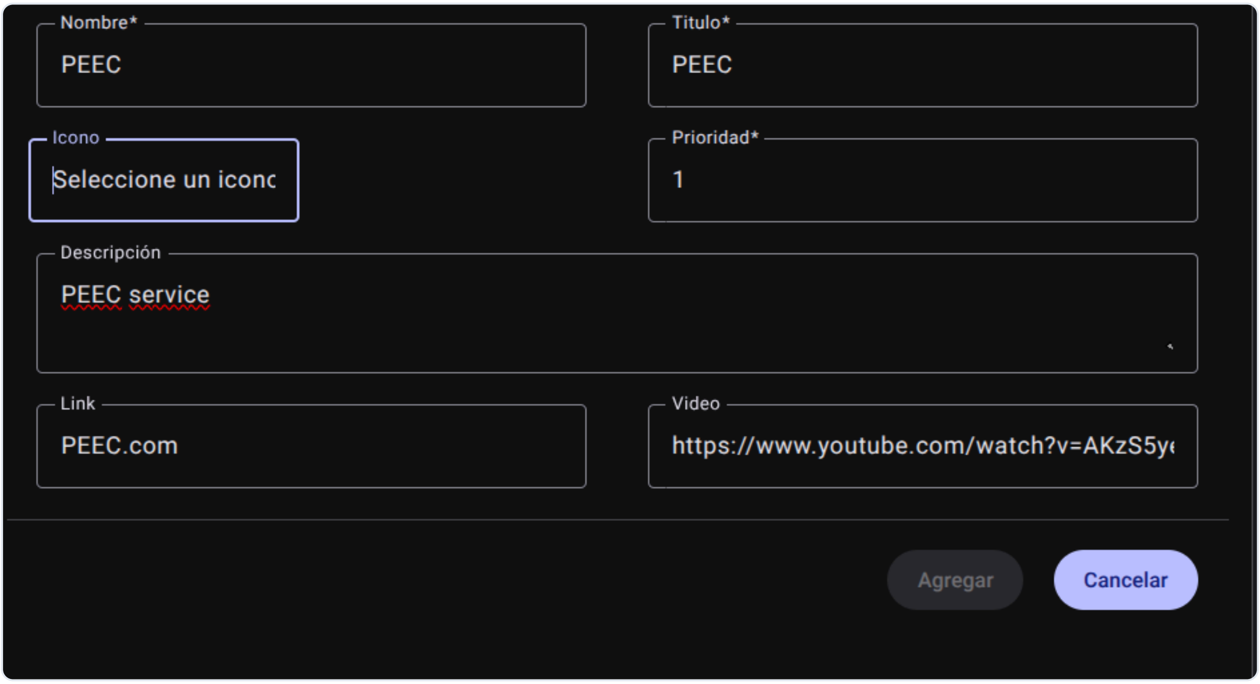
1. In the service management table, see the columns: Name, Title, Icon, Description, URL, Video, Priority, Registration Date and Actions.
2. Filter using the **"Search"** text box by service name, title, or key terms.
3. Sort the rows by priority level or registration date.



2. Register a New Service

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

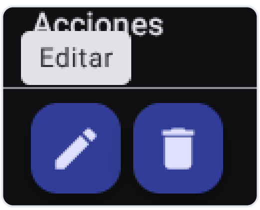
2. In the drop-down side panel, fill out the form fields:
   - **Name:** Service identifier name.
   - **Title:** Slogan or short heading of the service.
   - **Icon:** Name of the Material Icons icon for the cover.
   - **Description:** Explanatory detail of the value proposition of the service.
   - **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.



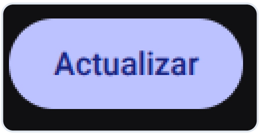
3. Save the changes using the **"Add"** button.

3. Edit a Service

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

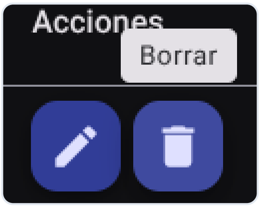


2. Modify the desired fields and save the changes with the **Actualizar** (Update) button.



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

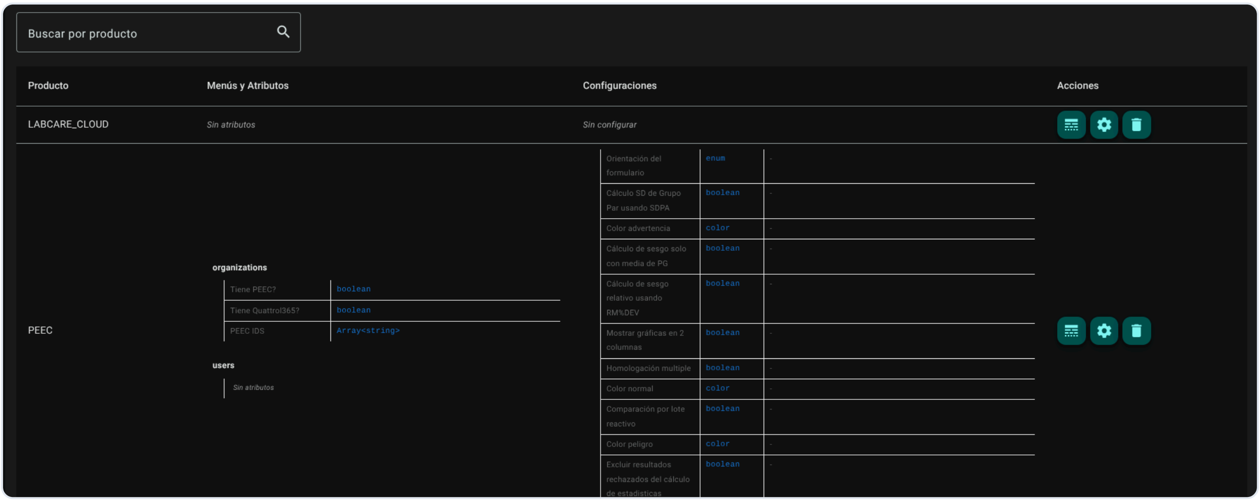
Follow the operation procedures to manage the system parameter grid:

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



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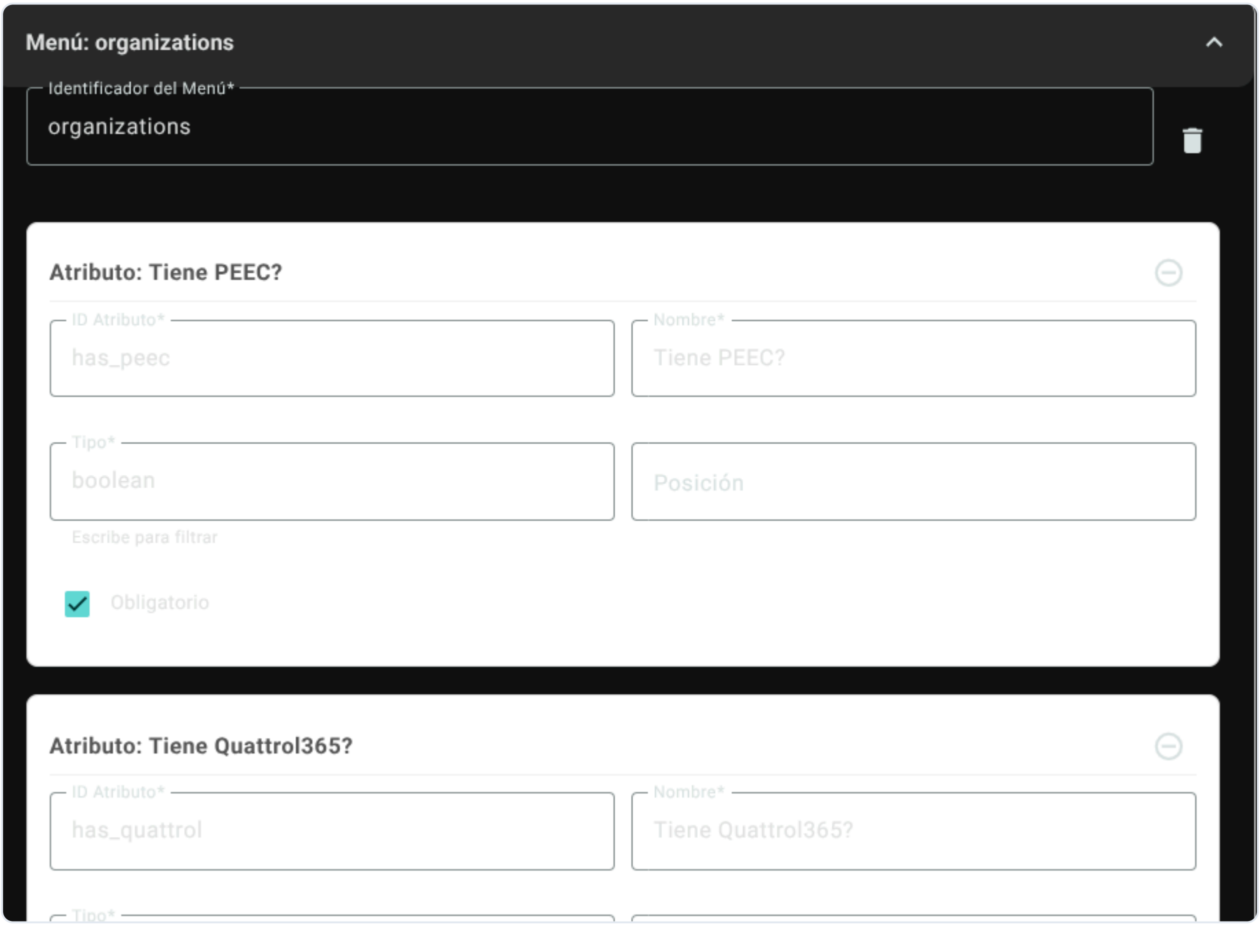
2. Edit General Attributes (Table/Menu Icon)

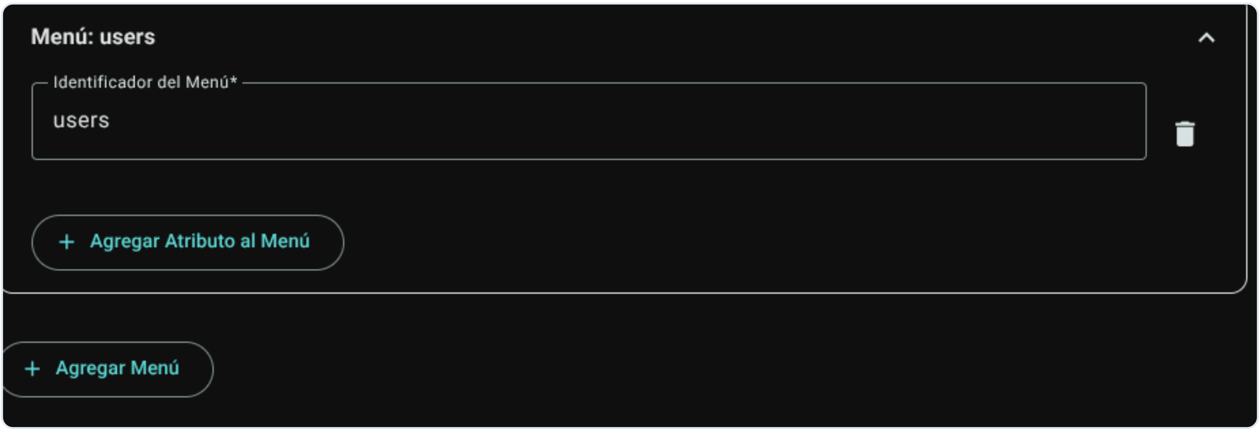
Allows you to modify the structure of custom fields that are injected into the product forms:

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*



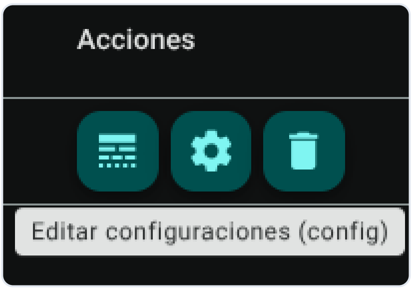
3. Once the parameters are completed, click the **Save Changes** button to apply and consolidate the product forms.

---

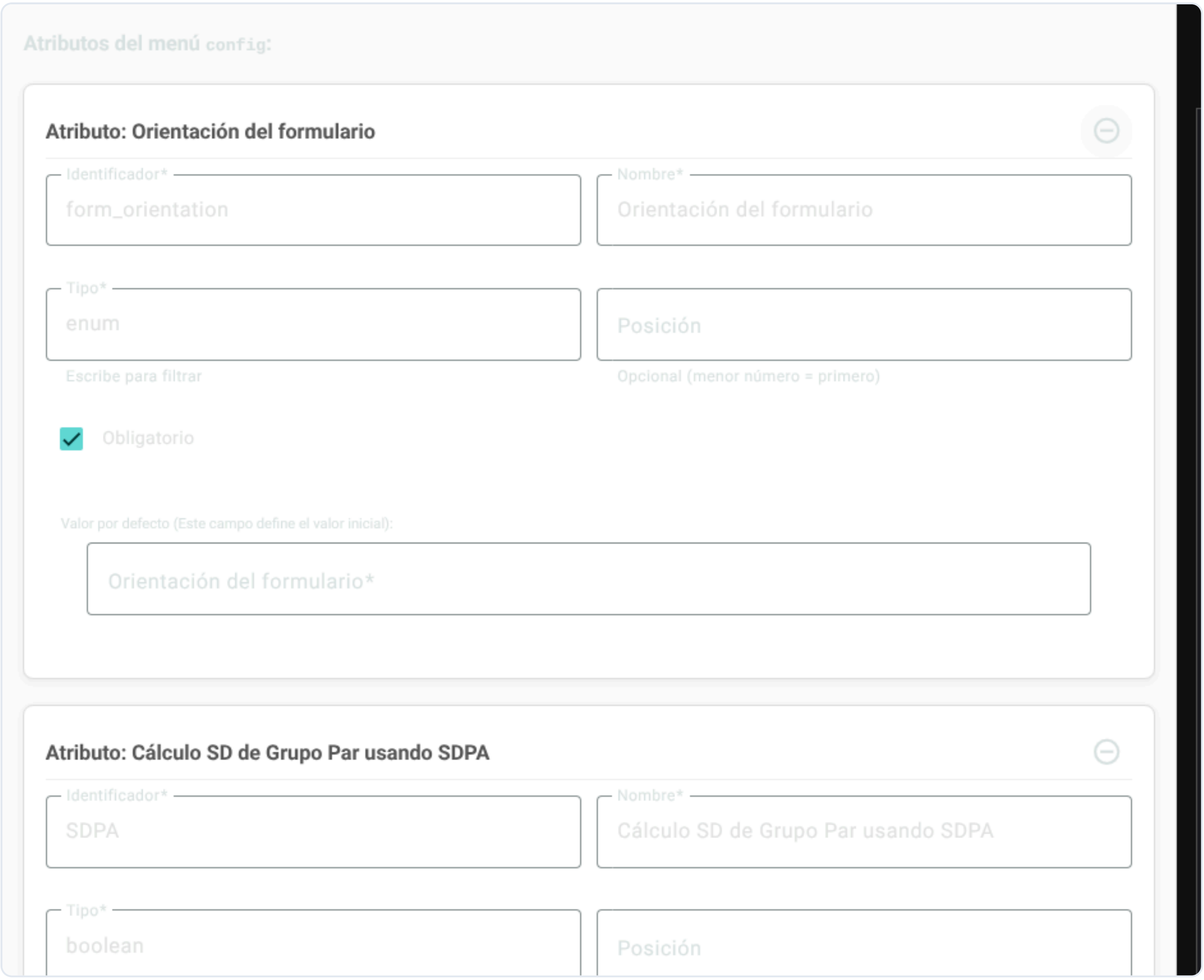
3. Edit Config Settings (Gear Icon)

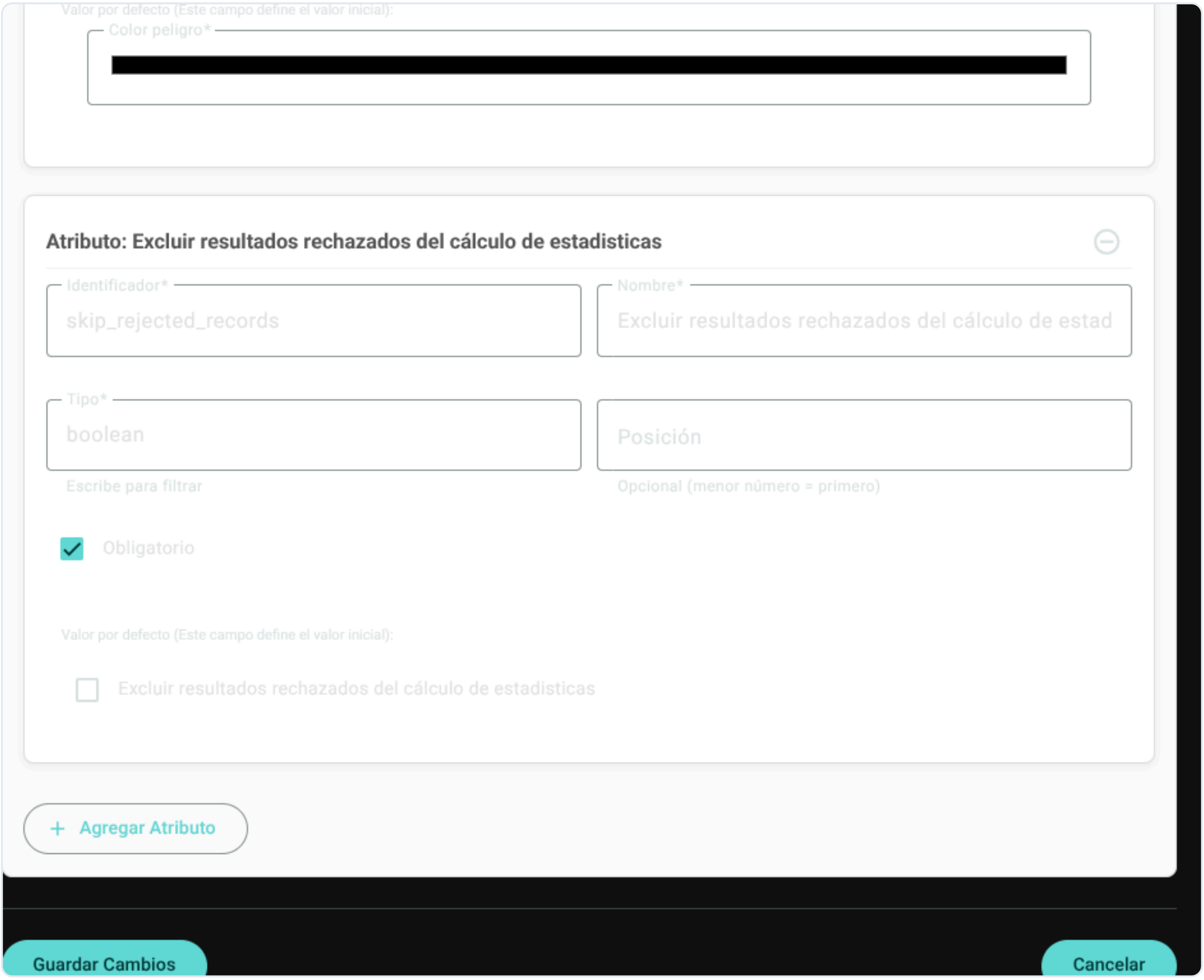
To parameterize system behavior variables and product default values:

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
Posición
Escribe para filtrar
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



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

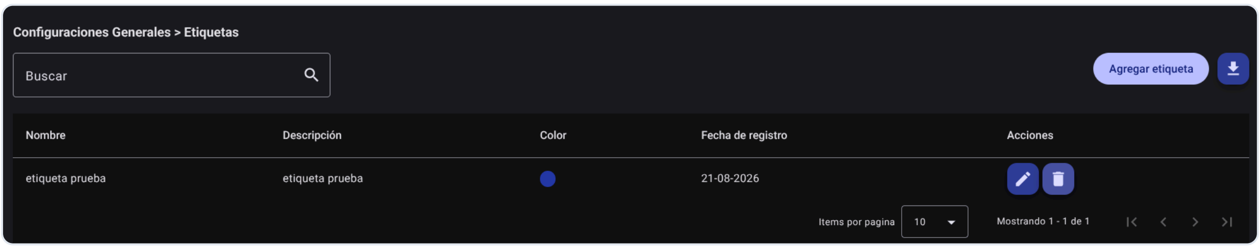
This module is used by system administrators to:

- **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

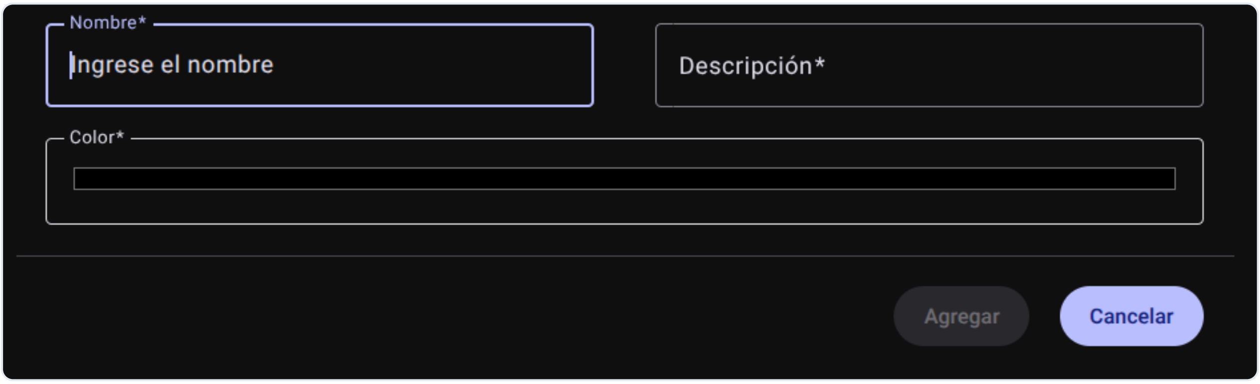
1. Use the search bar (**Search**) to locate specific tags by name or description.
2. Click on the column headers (**Name**, **Description**, **Record Date**) to sort the table in ascending or descending order.



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).

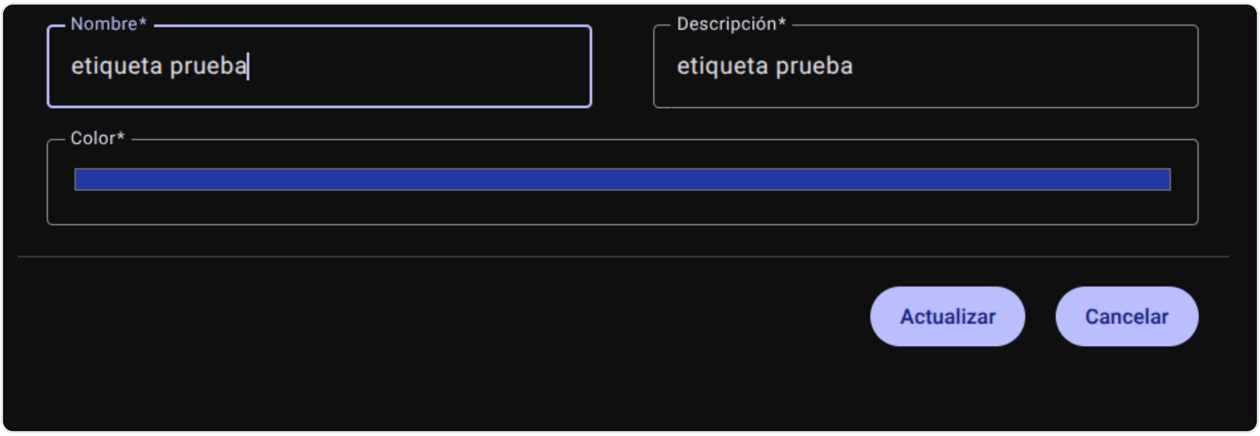


3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new label will be incorporated into the table showing a circular indicator with the chosen color.

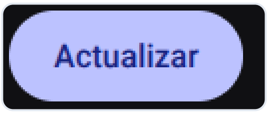
3. Edit an Existing Tag

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.

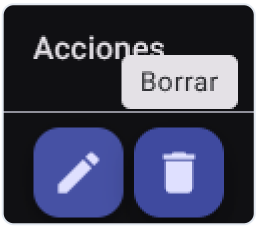


3. Press the **Update** button to save the changes to the system.

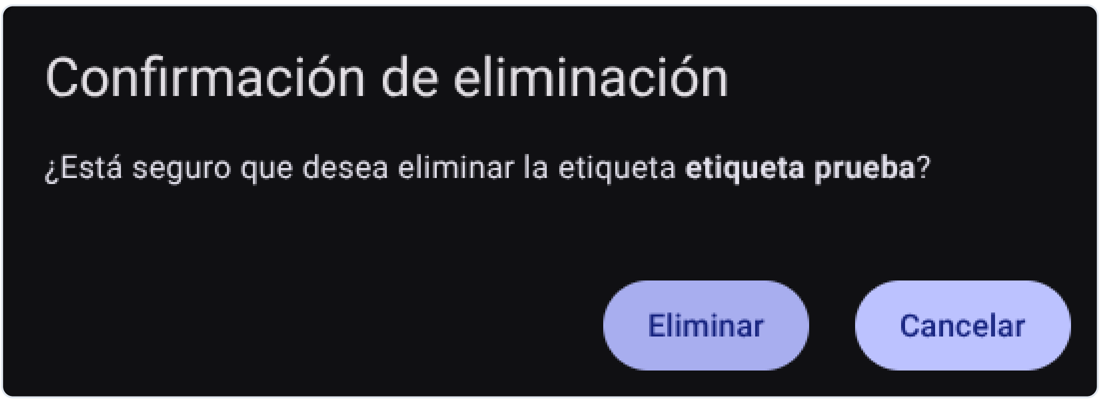


4. Delete a Tag

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

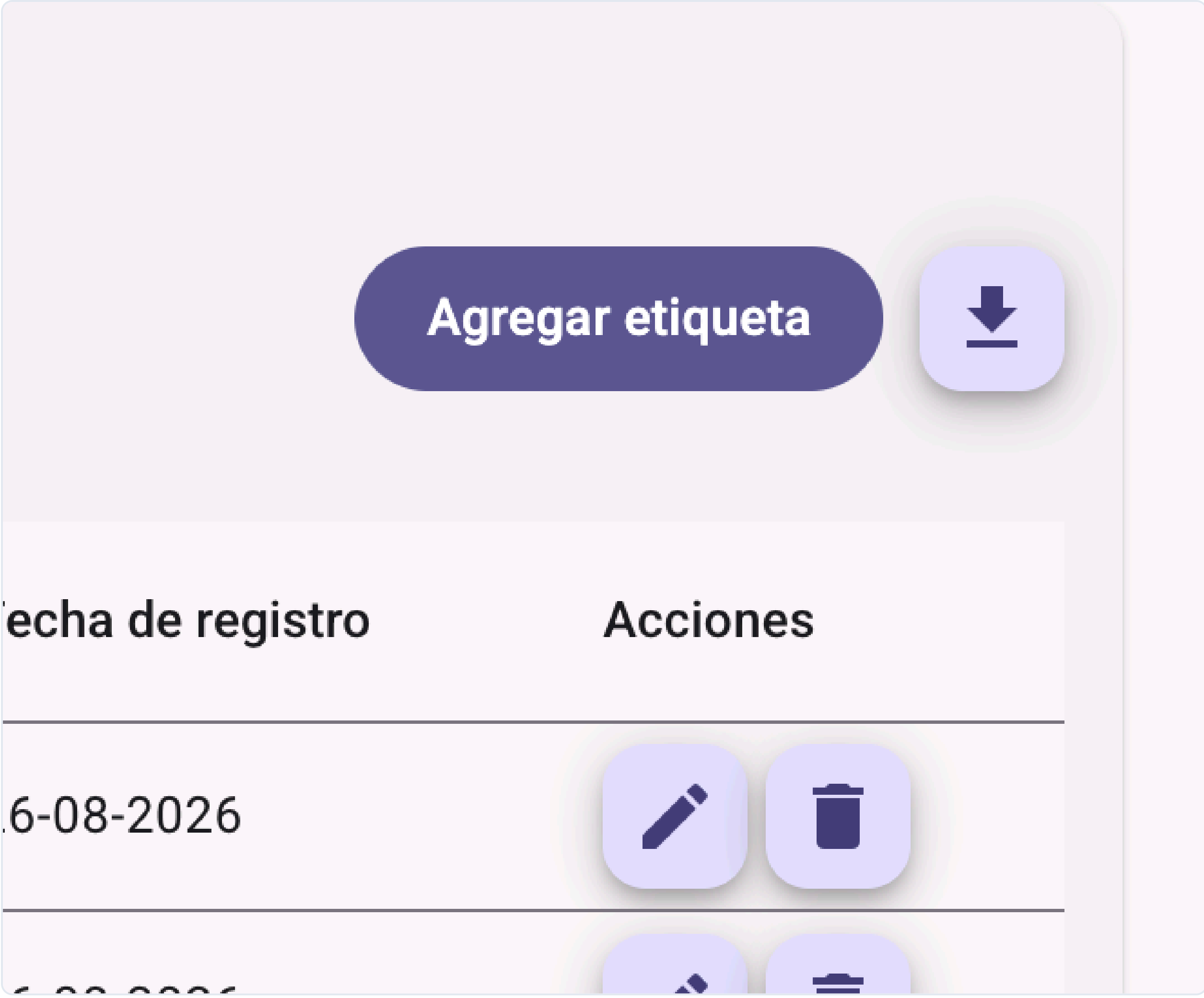


2. The system will display a direct confirmation box.



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 ($i18n$) 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

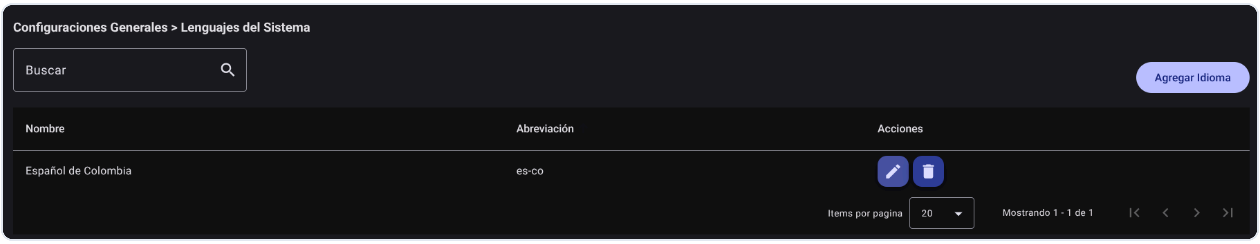
This module is used by system administrators to:

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

Possible Actions

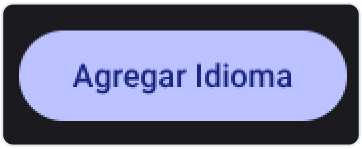
1. Check and Filter Languages

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.



2. Create a New Language

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

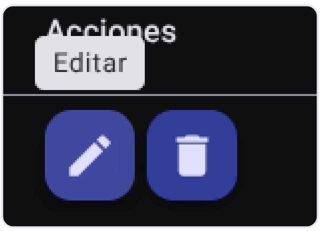


2. In the drop-down side panel, fill out the required fields:
   - **Name*** (Ex: *Spanish*).
   - **Abbreviation*** (Ex: *es-es*).

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

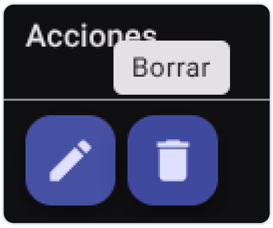
1. In the desired language row within the main table, locate the **Actions** column and click the pencil (**Edit**).



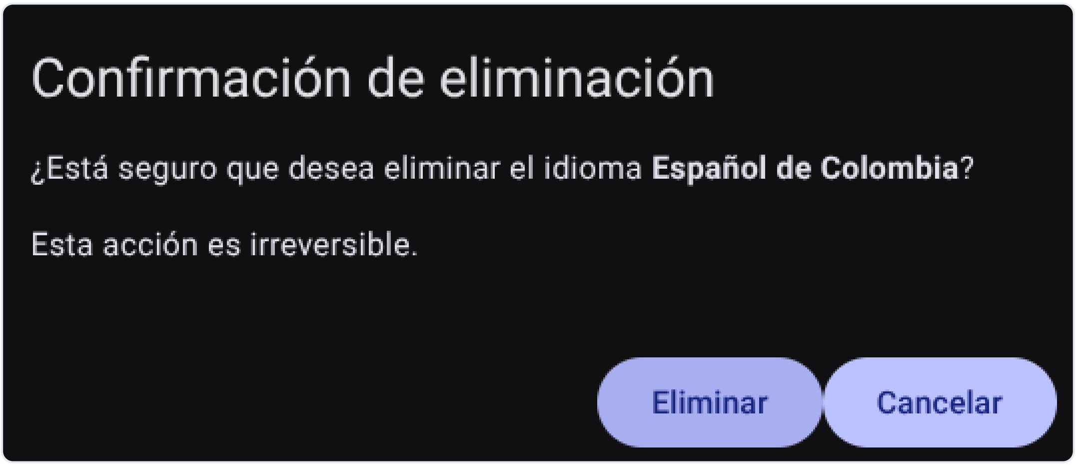
2. Open the side panel with the loaded information to modify the language name or abbreviation.
3. Press the **"Update"** button to save the changes to the system.

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

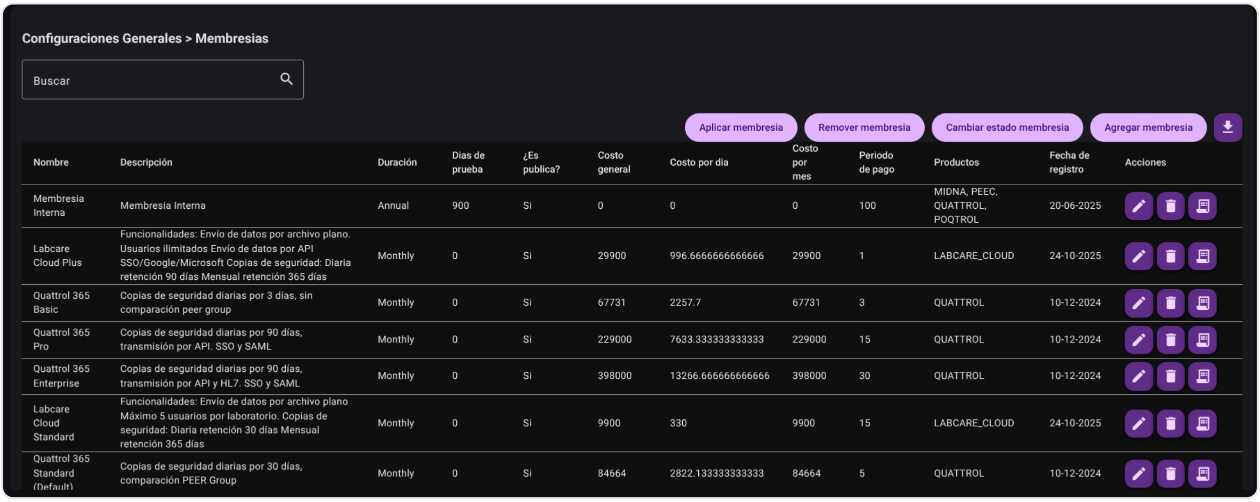
This module is used exclusively by global licensing administrators to:

- **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

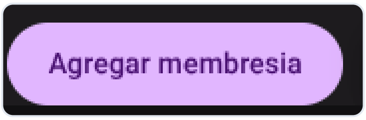
Allows administrators to consult the catalog of memberships configured in the system, showing commercial details such as name, description, duration, trial days, whether it is public, cost per day and month, assigned products and registration date.



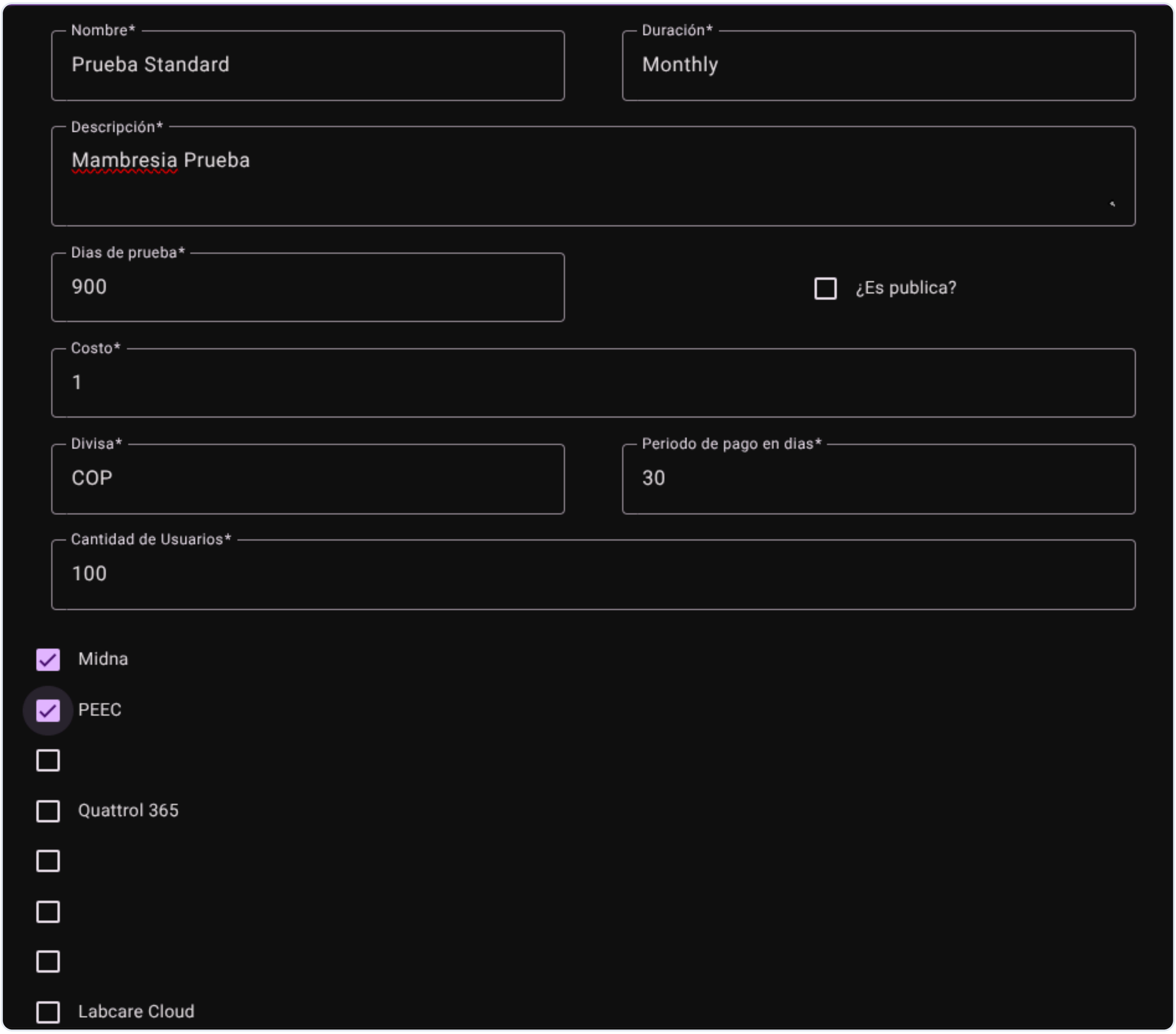
2. Add a New Membership

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.

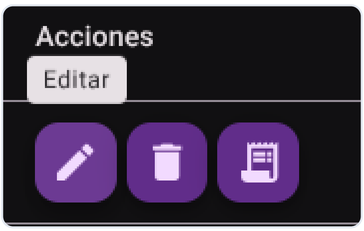


3. Click **"Add"** to register membership on the platform.

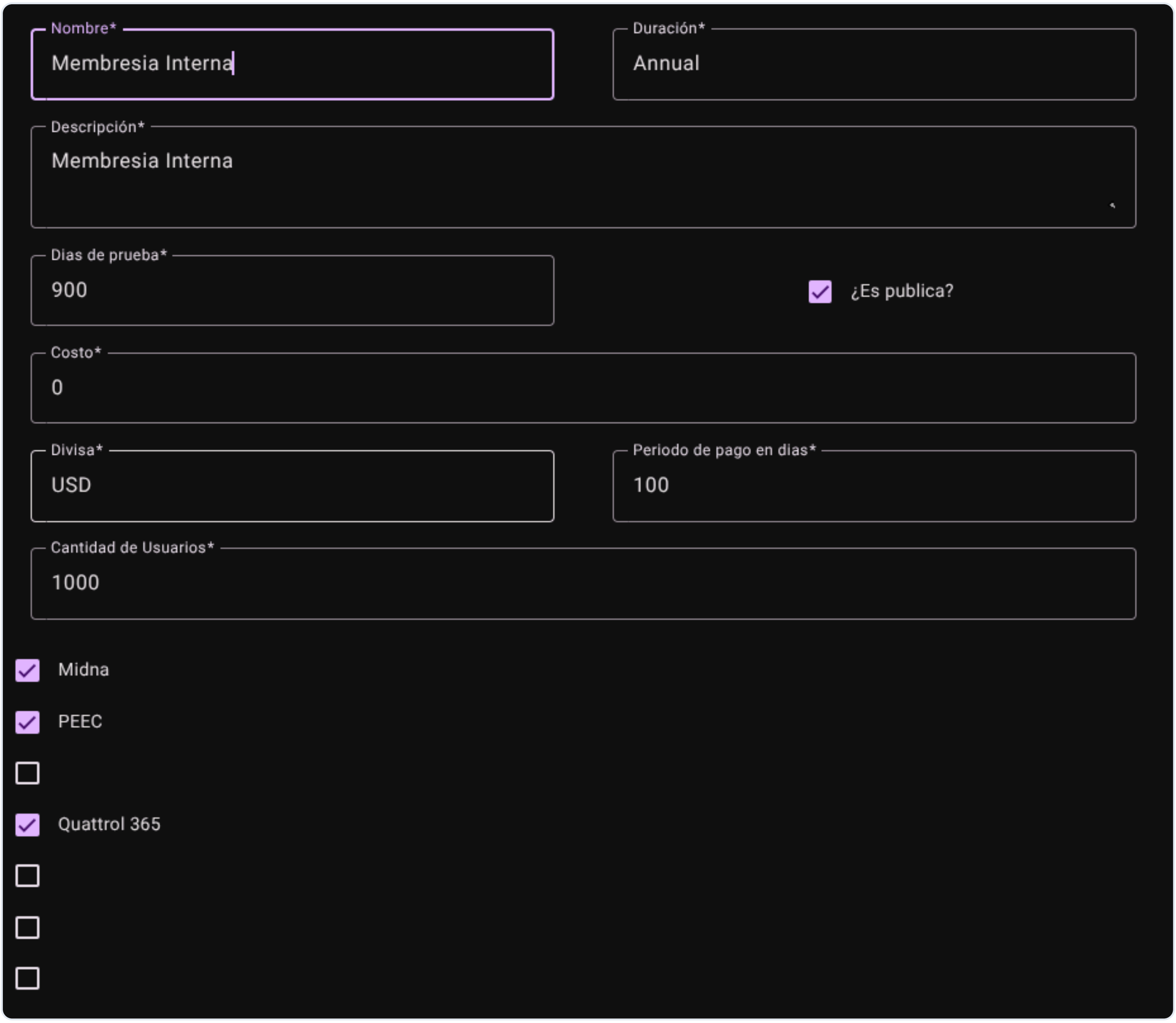
3. Edit a Membership

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.

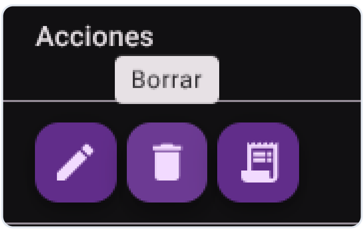


3. Click **"Update"** to apply the changes immediately.

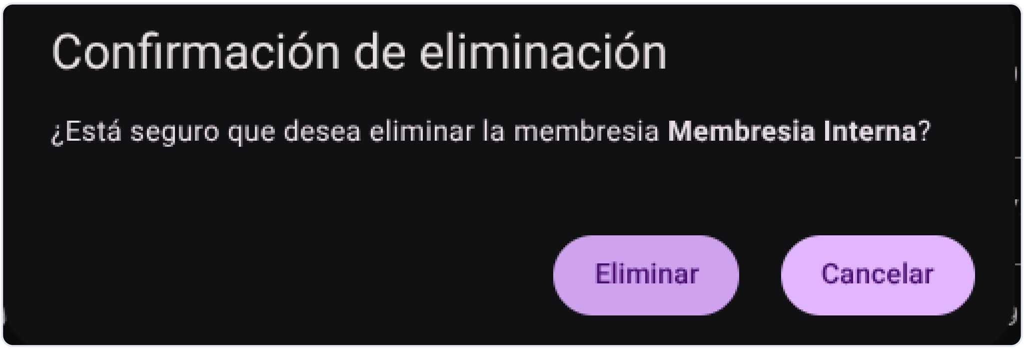
4. Delete a Membership

To definitively remove a subscription plan from the system catalog:

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



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

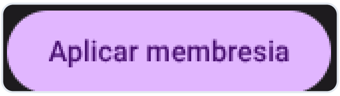


WARNING: The deletion action is irreversible and will be rejected by the system if the membership is currently assigned to any active organization on the platform.

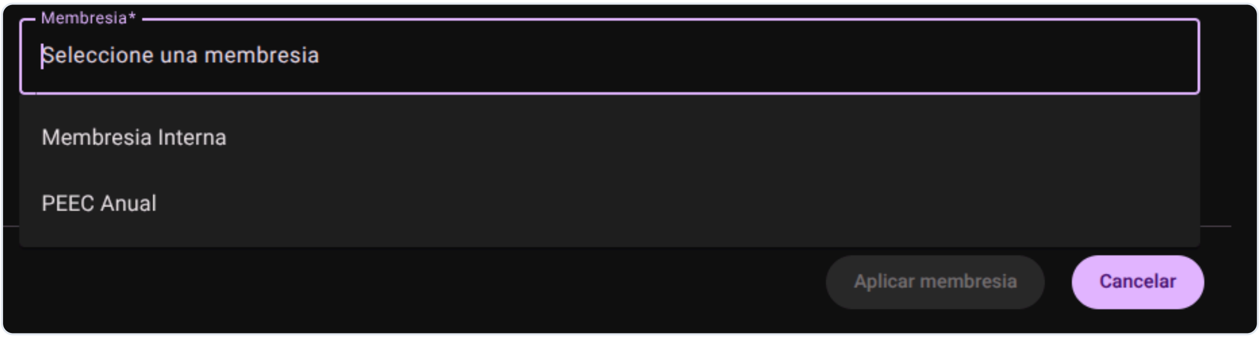
5. Apply Membership to Organizations

To associate a subscription with one or more client organizations:

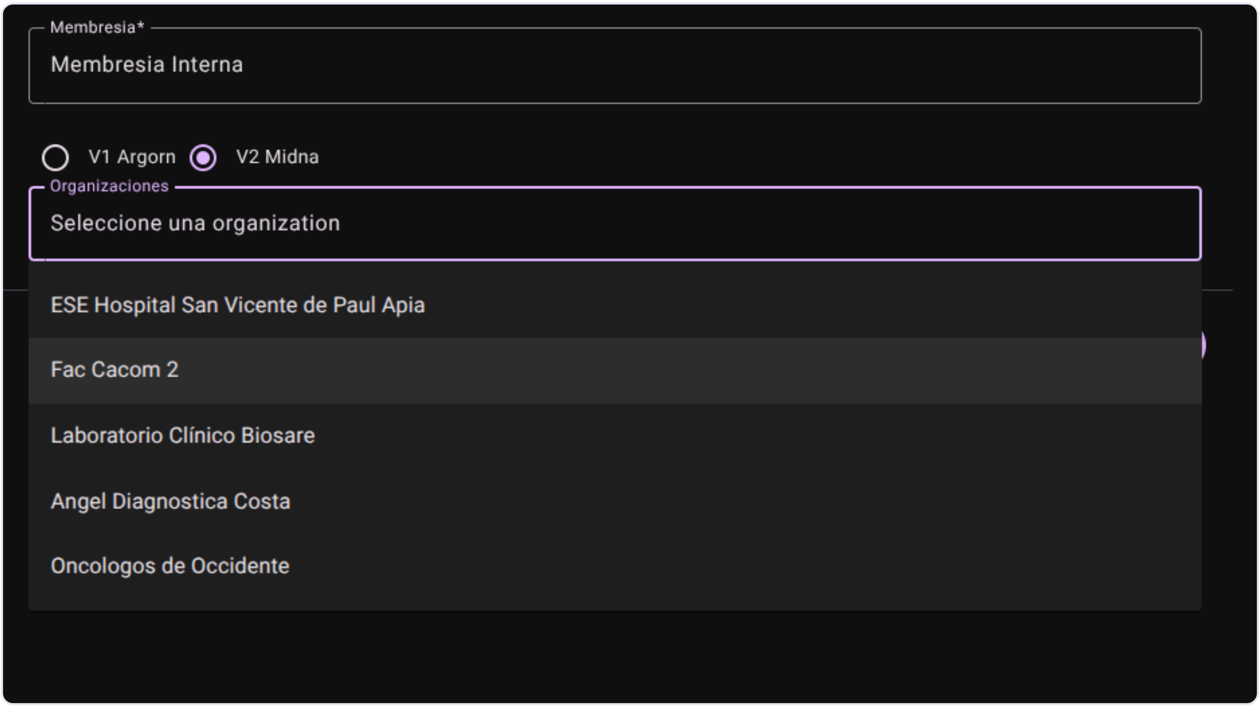
1. Click the **"Apply Membership"** button at the top of the panel.



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



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



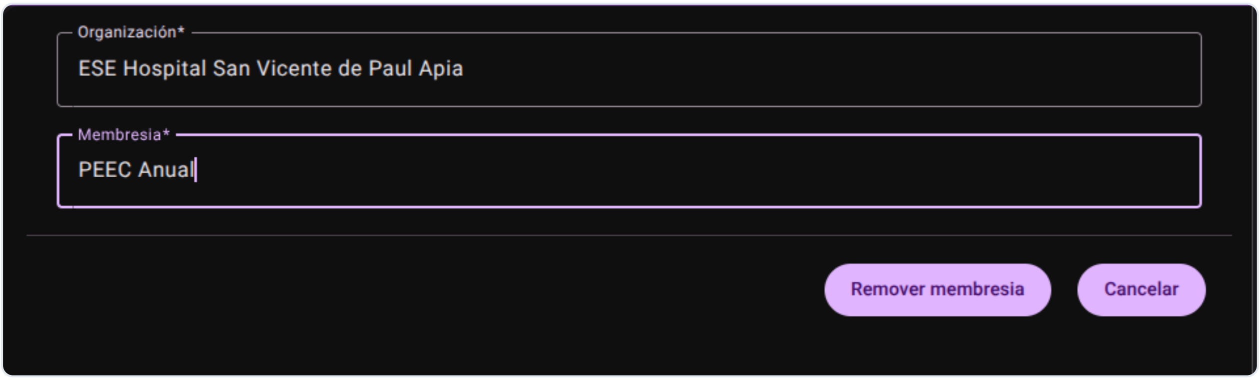
4. Click **"Apply Membership"** to grant access to the platform.

6. Remove Membership

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

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

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

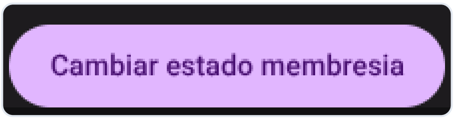


3. Press the **"Remove Membership"** button to unlink it.

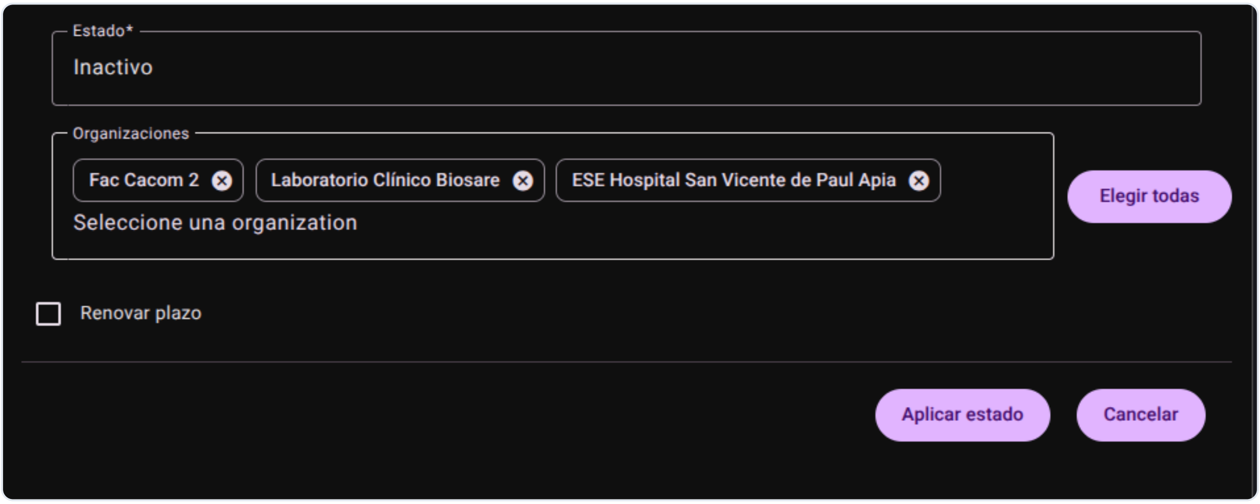
7. Change Membership Status

Enables manual subscription administrative status change for linked organizations:

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



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.



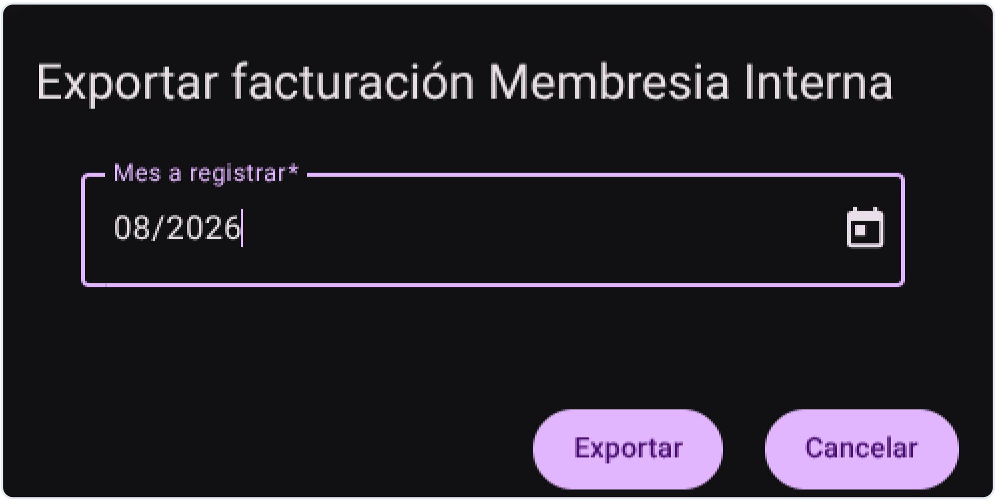
4. Press **"Apply Status"** button to apply.

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).

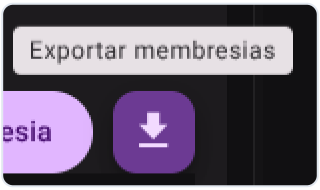
2. In the pop-up window, select the specific **Month** and **Year** of the billing you want to view.



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

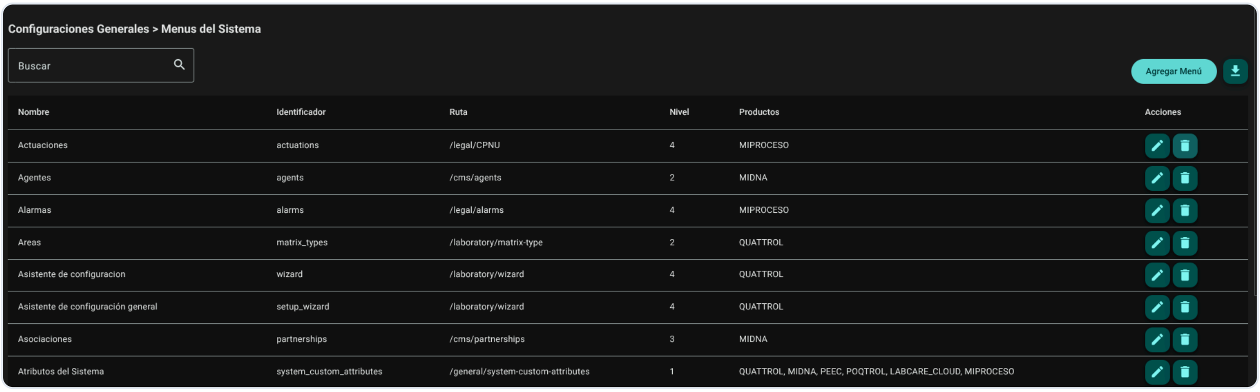
This module is used by system infrastructure administrators to:

- **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

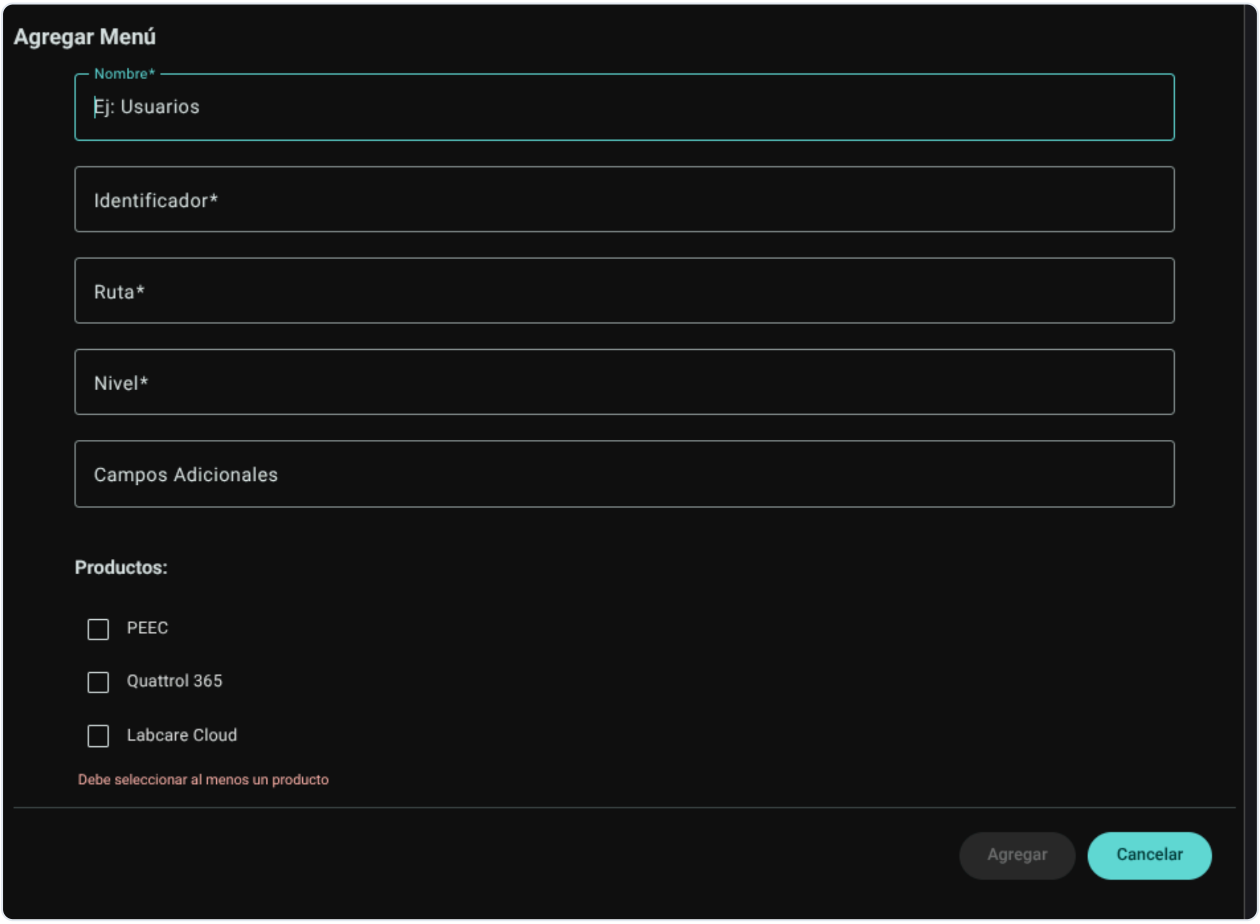
1. Enter text in the search bar (**Search**) to filter the menu list in real time.
2. Click on the column headers (**Name**, **Identifier**, **Path**, **Level**, **Products**) to change the table sorting.



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.



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

3. Edit an Existing Menu

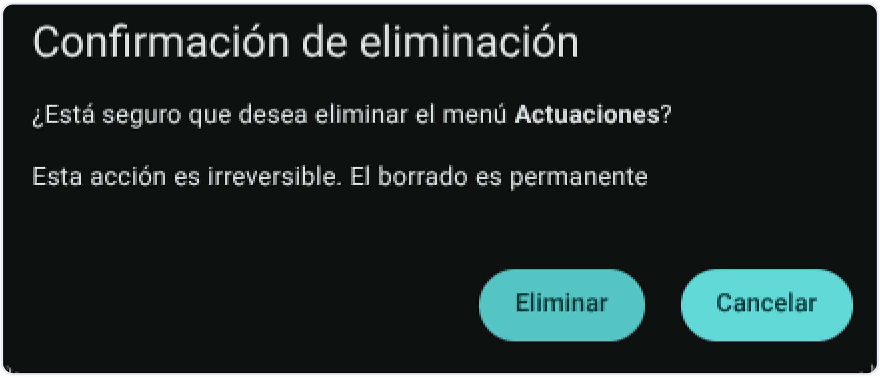
1. In the desired menu row within the main table, locate the **Actions** column and click on **pencil (**Edit**).

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

4. Delete a Menu

1. 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

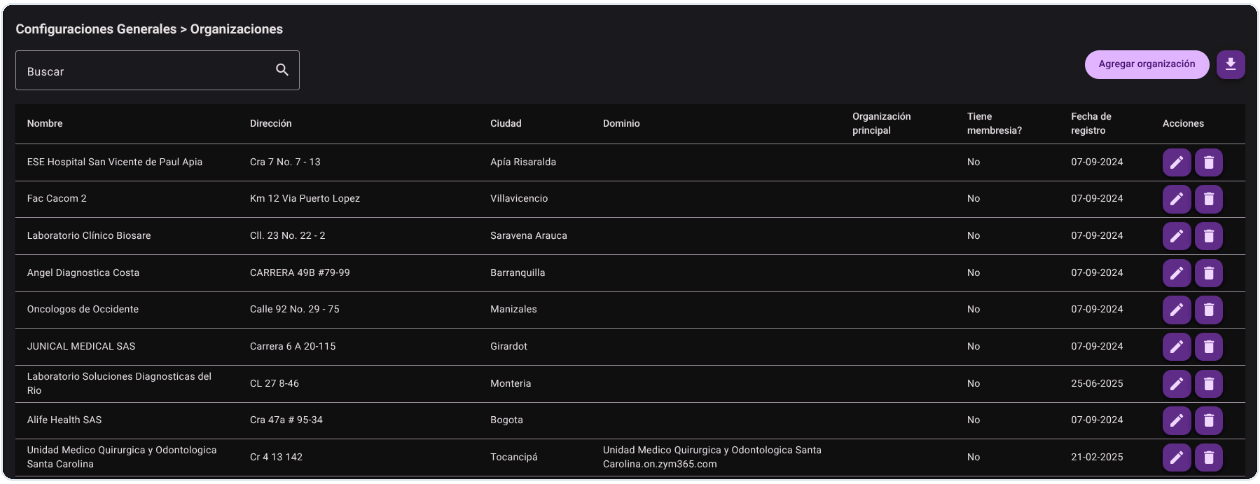
This module is for exclusive use by high-level administrative profiles (such as Product Administrators or Super Administrators). It is mainly used in the following scenarios:

- **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

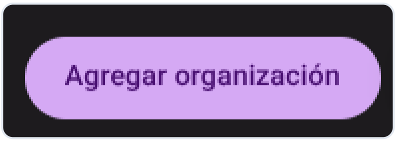
Allows administrators to examine the entire database of registered organizations. The records are presented in a table organized with the name, location, domain and hierarchical organization of each entity, whether or not it has membership and its joining date.



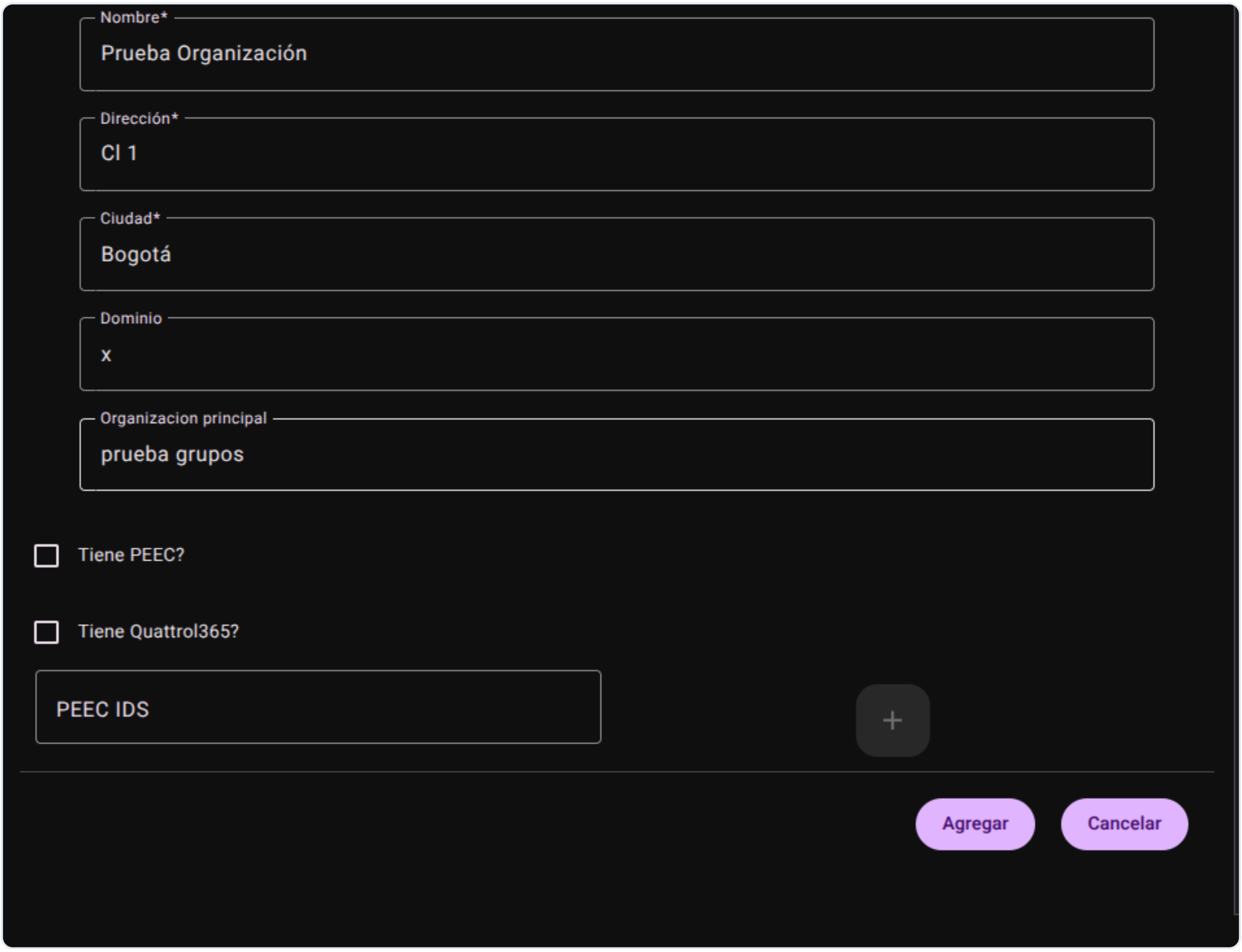
2. Add a New Organization

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.



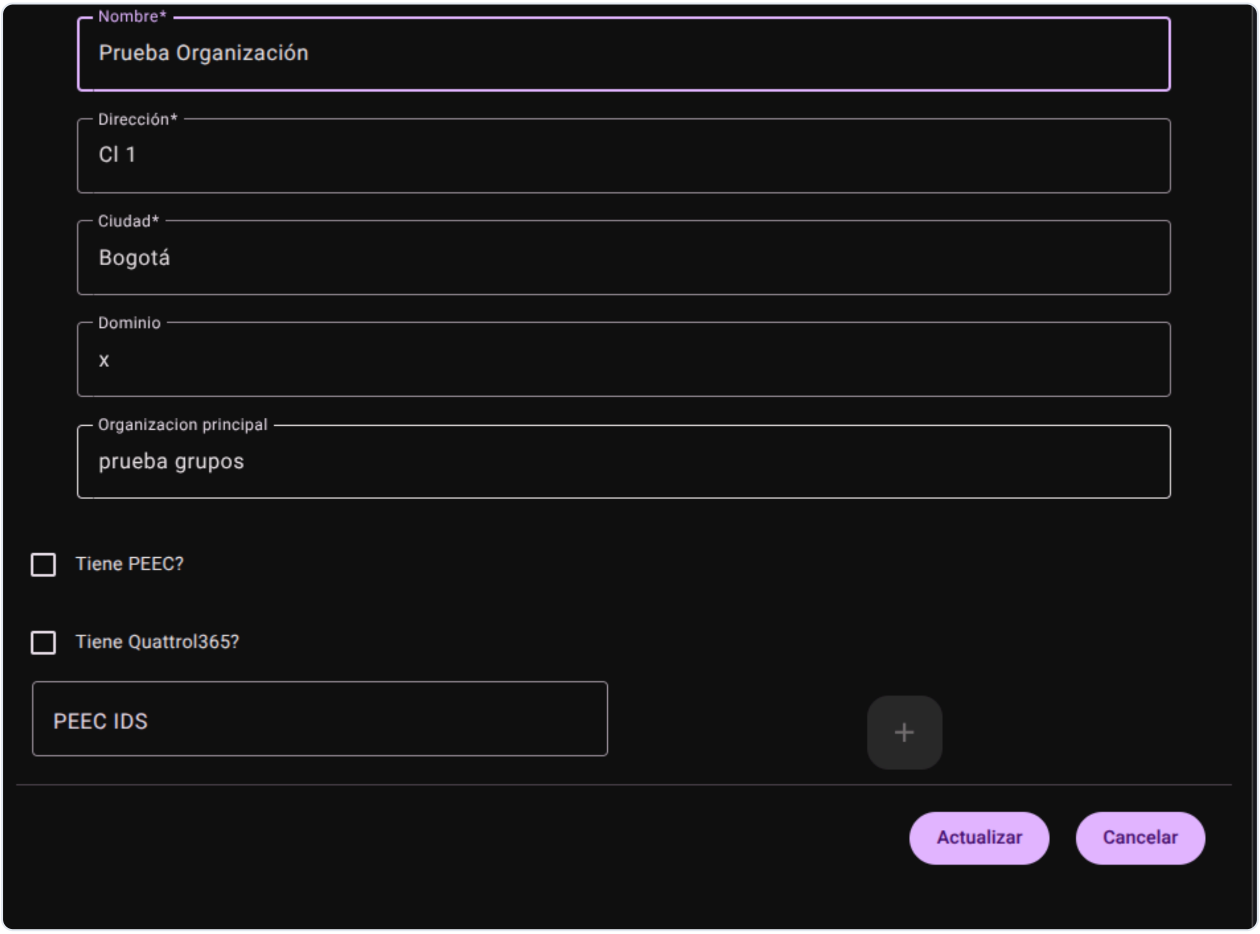
3. Press the **"Add"** button to save the record.

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.

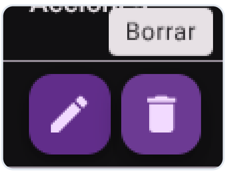


3. Make any necessary changes to the name, location, domain, or mapping of your parent hierarchical organization. There are no technical restrictions for updating these fields.
4. Click **"Update"** to apply the changes to the database.

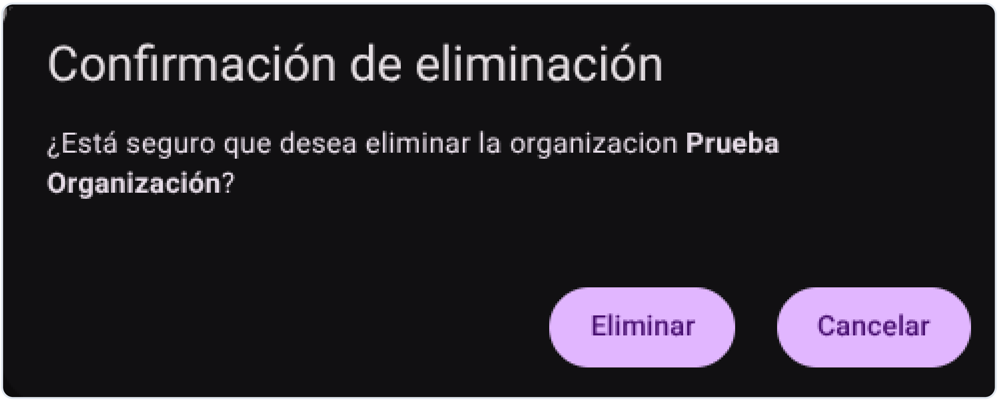
4. Delete an Organization

To permanently remove an entity from the platform:

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



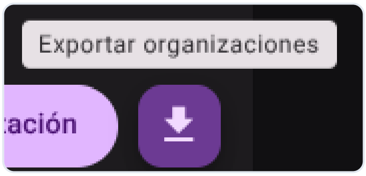
2. A confirmation modal will open warning that the action is irreversible and will affect the related data.



> **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

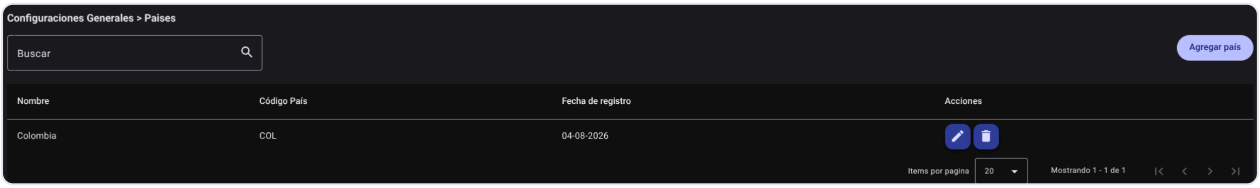
This module is used by system administrators to:

- **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.

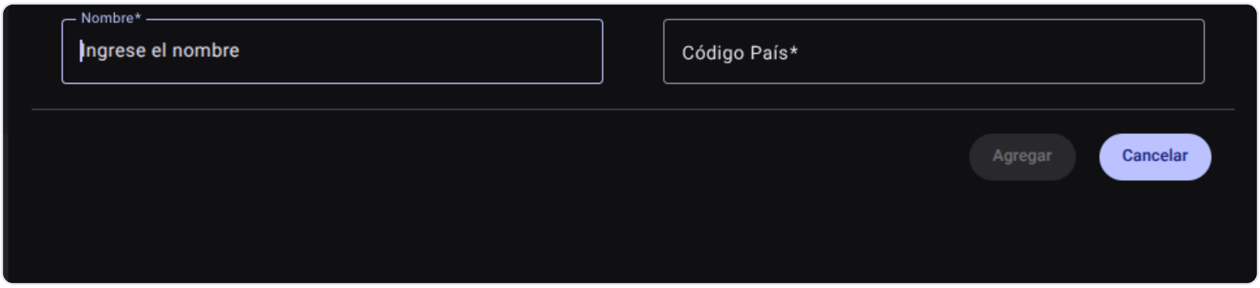
Possible Actions

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.

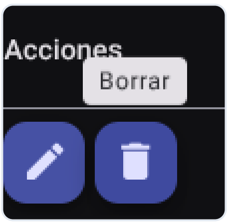


4. To add the country you must click the **Add** button

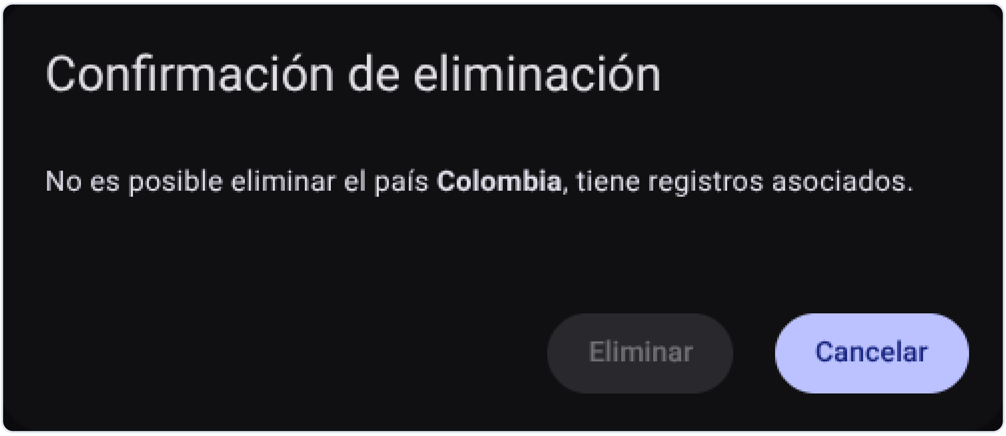
4. To modify an existing record, use the edit button (pencil icon).

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

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



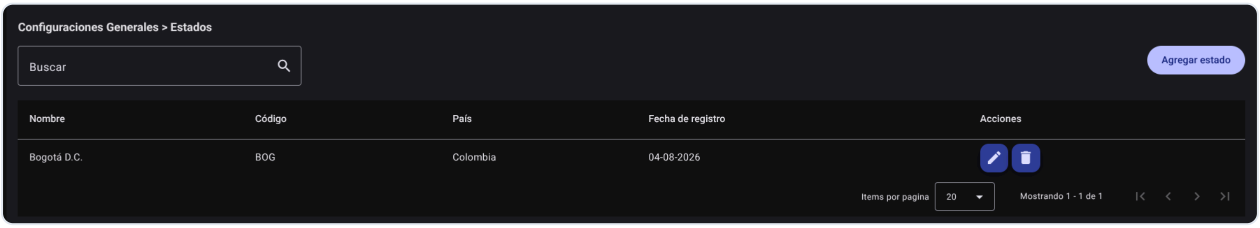
7. The system will display a direct confirmation box.



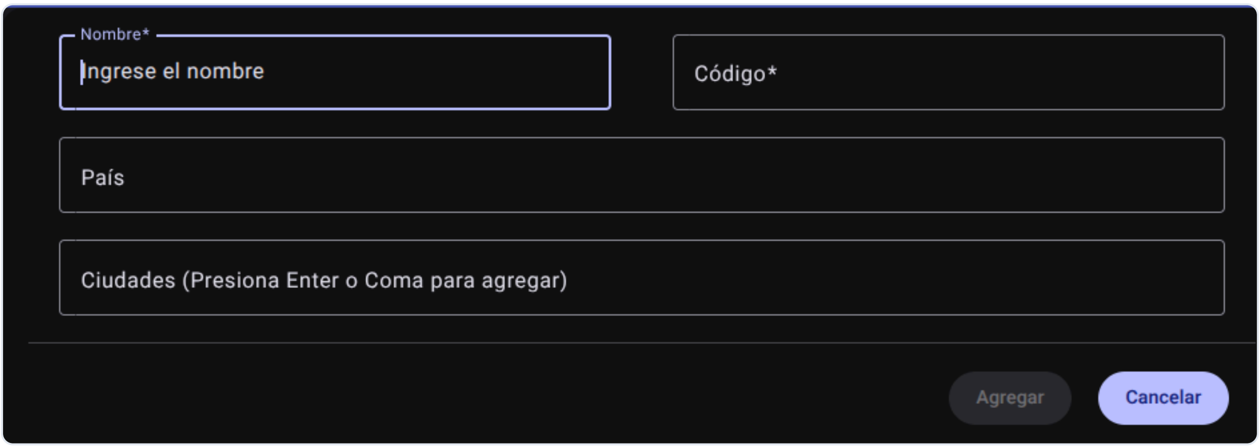
CAUTION: The system blocks the deletion of any country that is being used or that has associated records.

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.



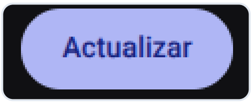
3. To register a new **state**, click on **"Add state"** and enter the Name, Official Code, Country and cities (to do this, press the Enter or Comma (,) keys to add, they will be placed in a small box and if removal is required, click the (x) in the same box.



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

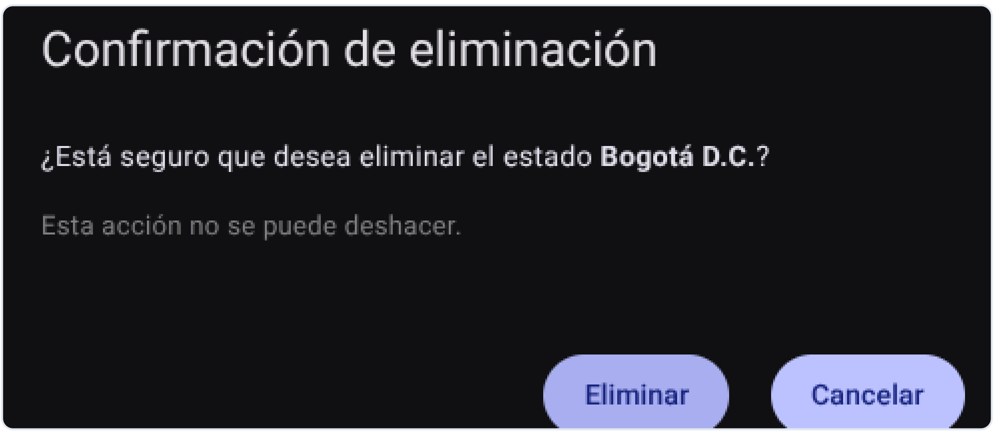
5. To modify an existing record, use the edit button (pencil icon).

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

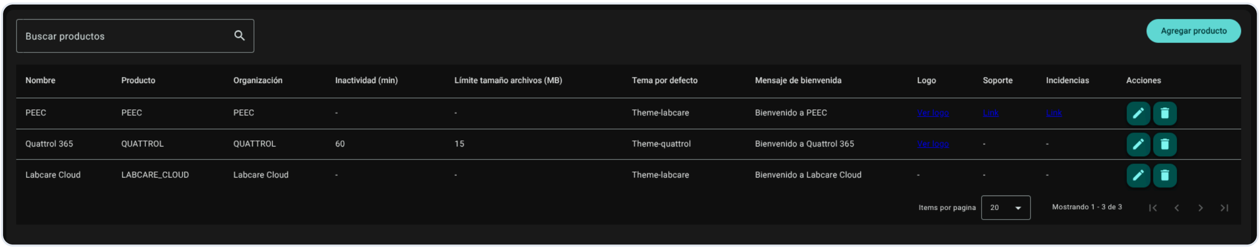
This module is used by platform administrators to:

- **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

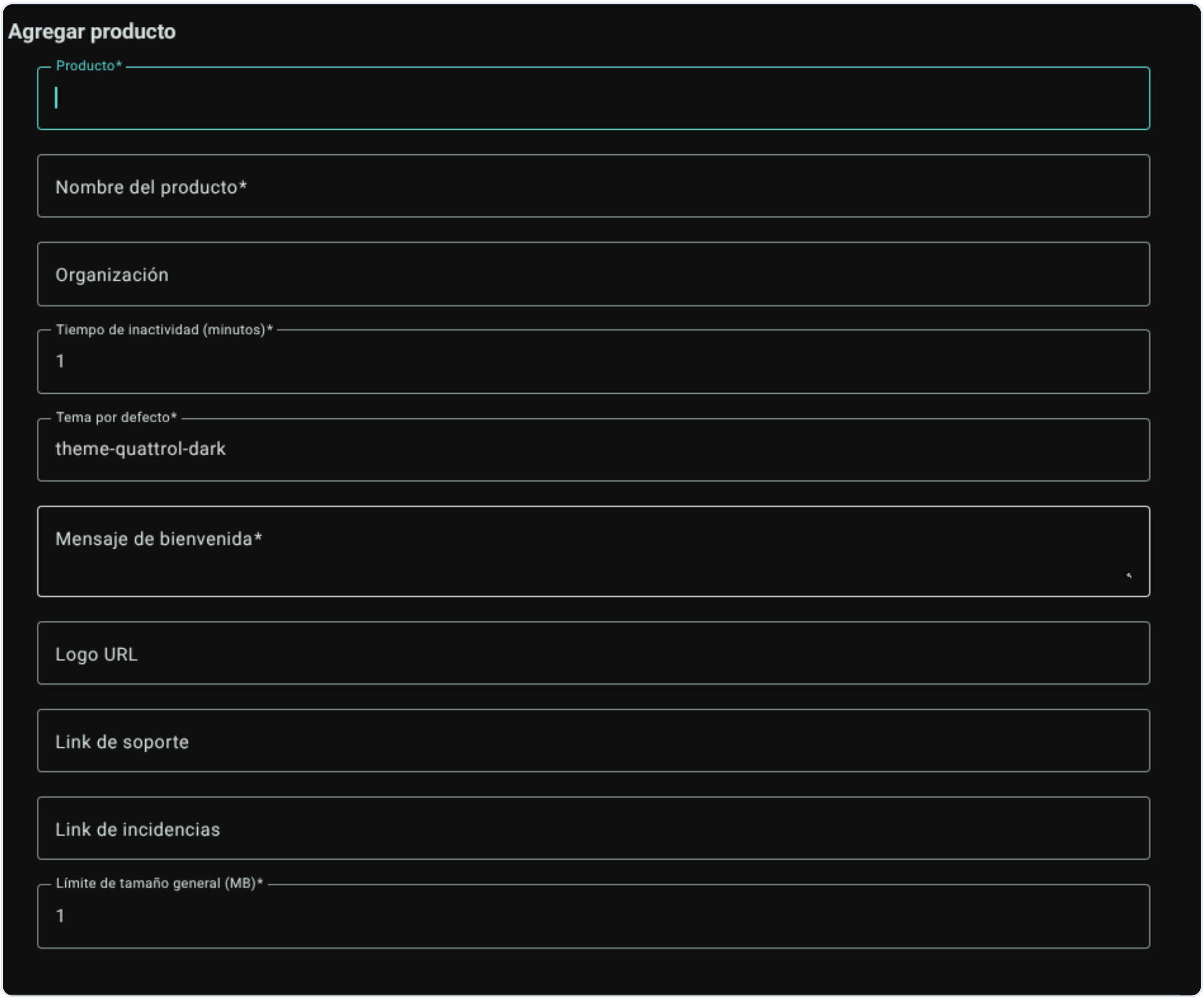
1. Enter terms in the search bar (**Search products**) to filter records in real time.
2. Click on the column headers (**Name**, **Product**, **Organization**, **Inactivity**, etc.) to sort the list in ascending or descending order.
3. The **Logo**, **Support** and **Issues** columns show shortcuts configured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

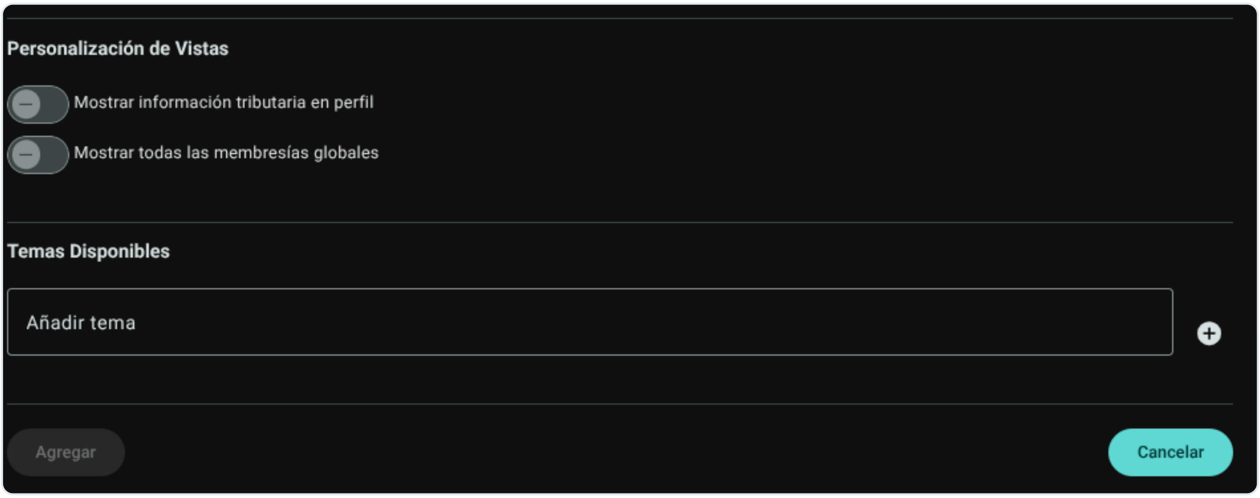


2. Create a New Product

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

2. In the side panel that appears, complete the required information:
   - **Product*** and **Product name***
   - **Organization**
   - **Downtime (minutes)***
   - **Default theme*** (select the primary visual theme from the listing).
   - **Welcome message***
   - **Logo URL**, **Support link** and **Incident link**
   - **General size limit (MB)*** (Note: must be a value greater than 5 MB; the system automatically validates this minimum).
   - **View Customization:** Turn the switches on or off (*Show tax information in profile*, *Show all global memberships*).
   - **Available Themes:** Choose a theme from the drop-down menu and press the ****+** (*Add Theme*) button to enable several alternative themes. Added topics appear as labels below the selector.

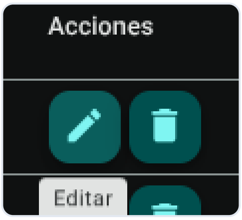




3. Click ****Add" to save the settings (or **"Cancel"** to discard them without keeping changes).

3. Edit an Existing Product

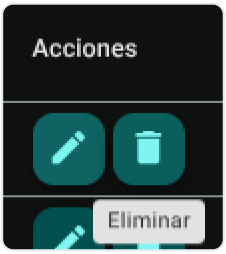
1. In the row of the desired product within the main table, locate the **Actions** column and click on **pencil (**Edit**).



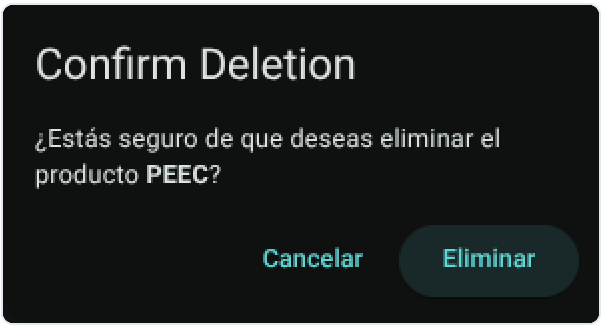
2. The panel with the loaded product information will be displayed, make the necessary adjustments and save using the **"Update"** button.

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

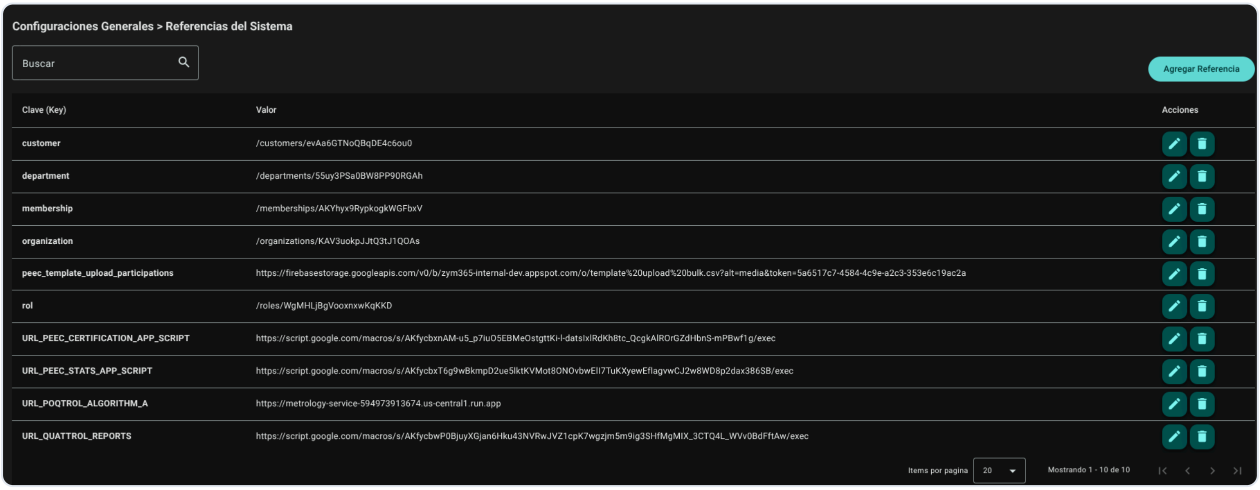
This module is managed by the architecture and infrastructure team to:

- **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

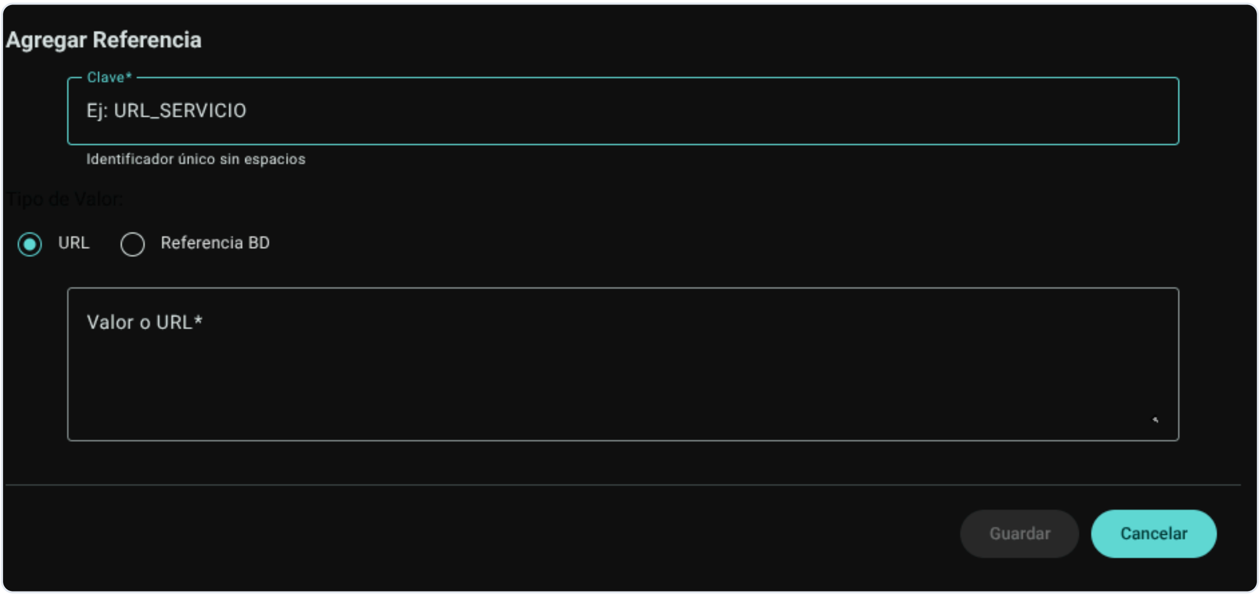
1. Use the search bar (**Search**) to locate specific keys or values in real time.
2. Click on the column headers (**Key** or **Value**) to change the sorting of the list in ascending or descending order.



2. Create a New Reference

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

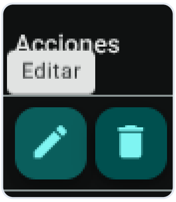
2. In the side panel that appears, complete the required fields:
   - **Key*** (enter the unique identifier without spaces).
   - **Reference type**: select the corresponding option:
     - **URL**: Enables the **Value or URL*** field to enter the link.
     - **DB Reference**: Enables the **Document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



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**).

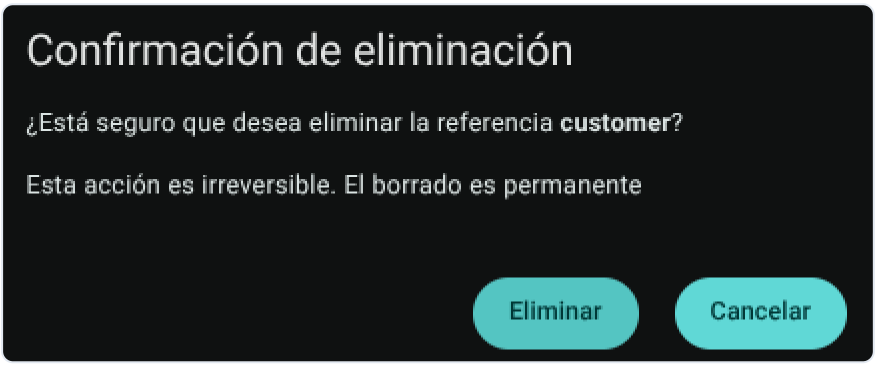


2. The **Edit Reference** panel will be displayed; Modify the key, change the mode (URL / BD) or update the route and save the changes using the **"Update"** button.

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

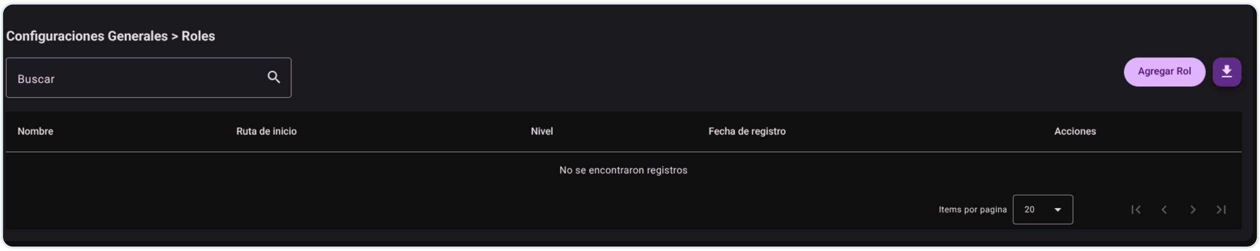
This module is used critically by Platform Administrators to:

- 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.

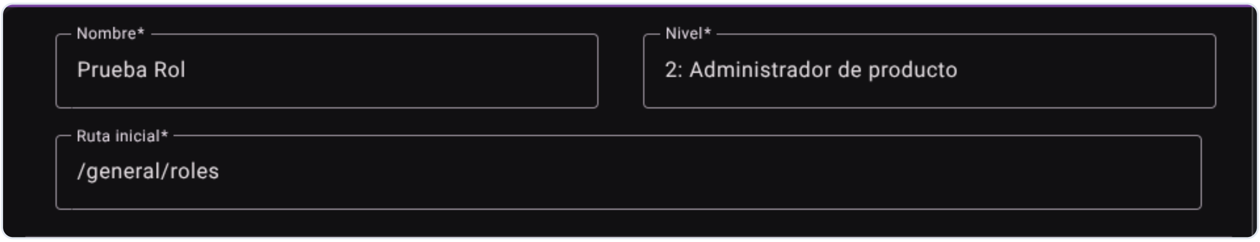


2. Add a New Role

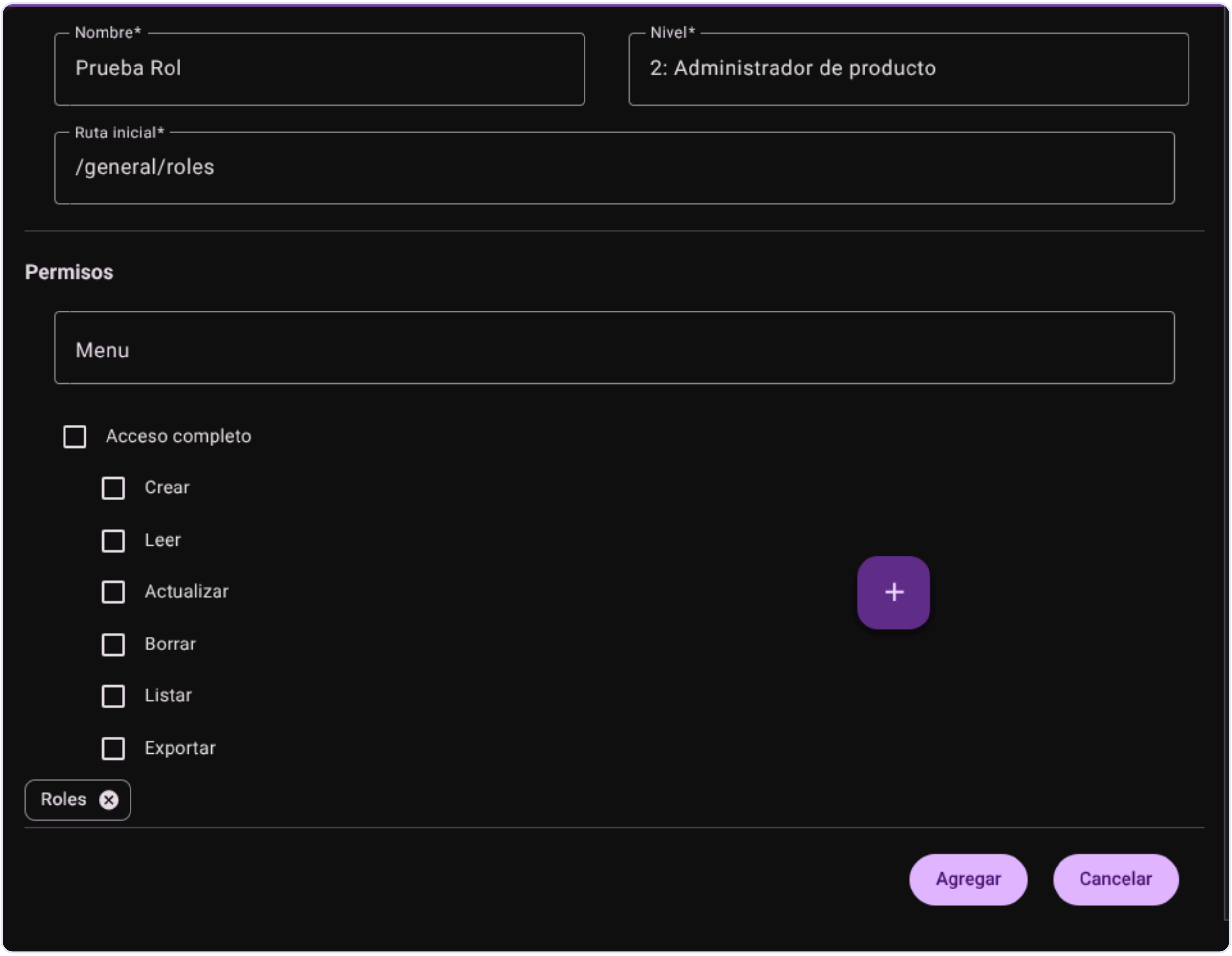
To create and configure a role in the system:

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 produto`)
    - **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.

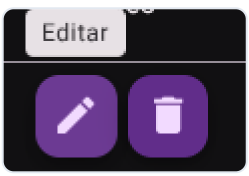


4. Click **"Add"** to save the role.

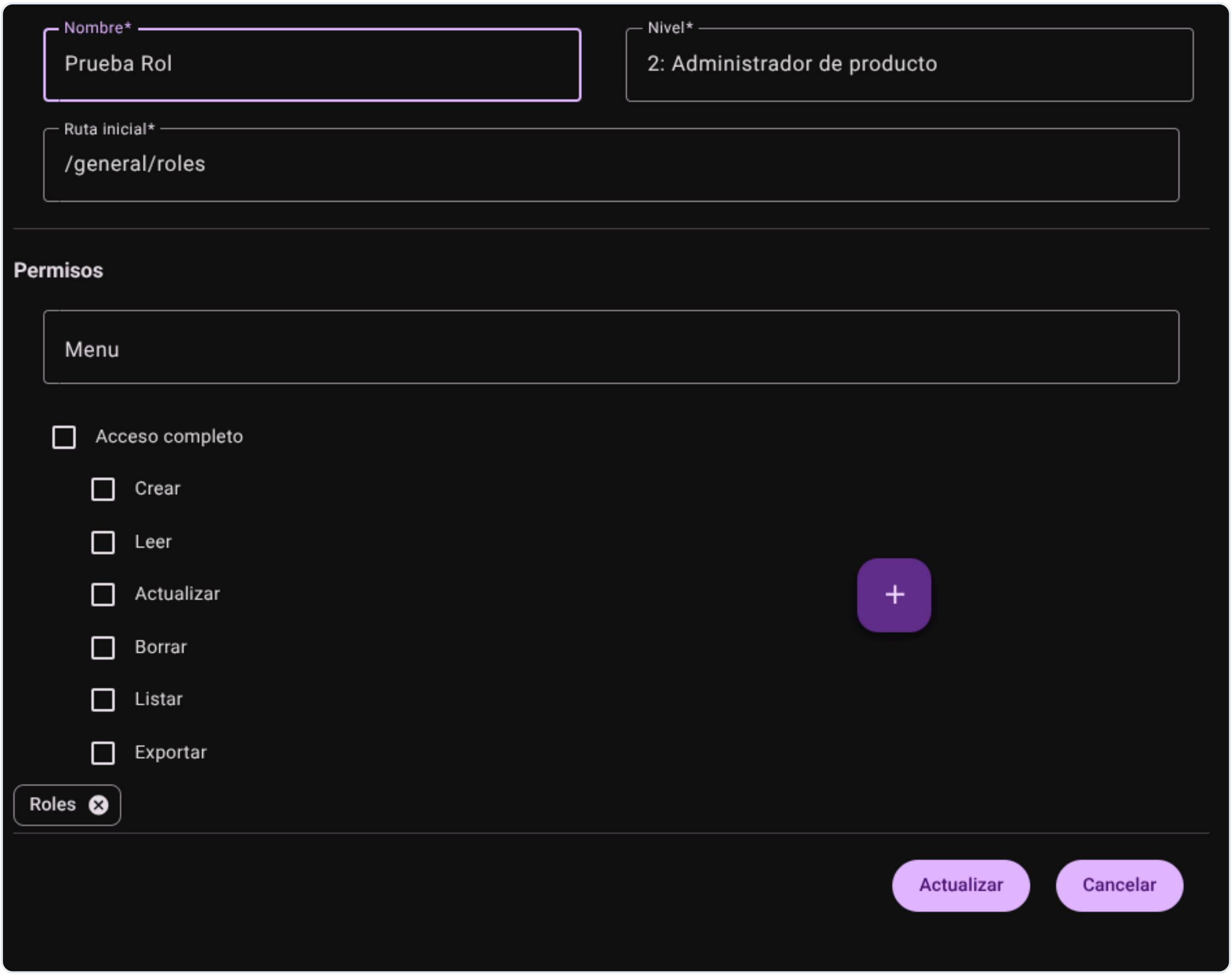
3. Edit a Role

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.

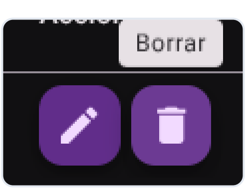


3. Click **"Update"** to apply the changes immediately.

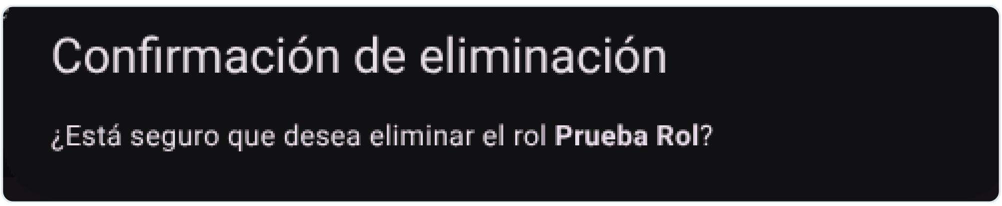
4. Delete a Role

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

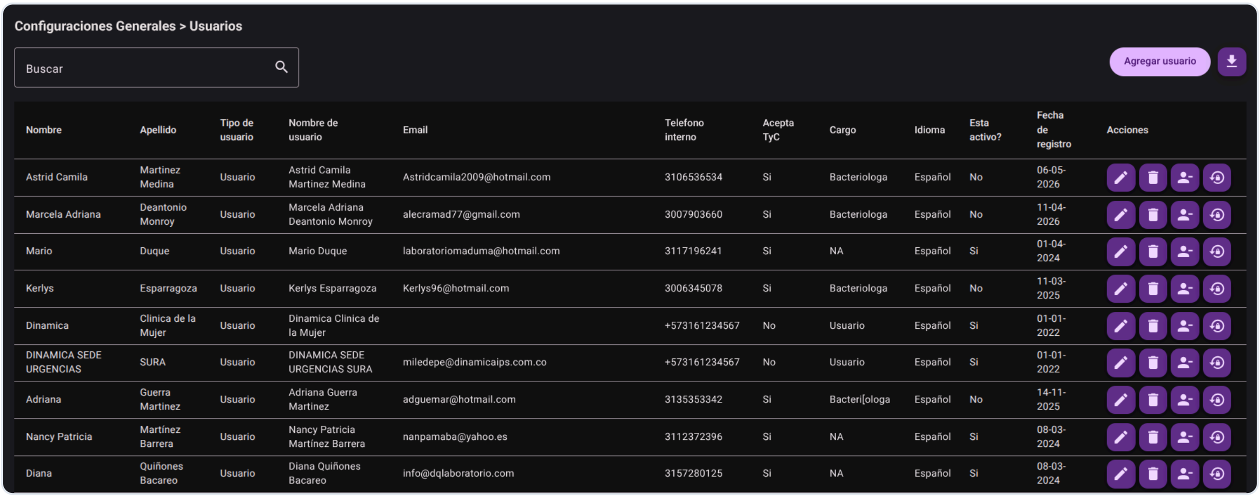
This module is used by organization Administrators to:

- **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	Martinez Barrera	Usuario	Nancy Patricia Martinez Barrera	nanpamaba@yahoo.es	3112372396	Si	NA	Español	Si	08-03-2024	
Diana	Quiñones Bacareo	Usuario	Diana Quiñones Bacareo	info@dqlaboratorio.com	3157280125	Si	NA	Español	Si	08-03-2024	

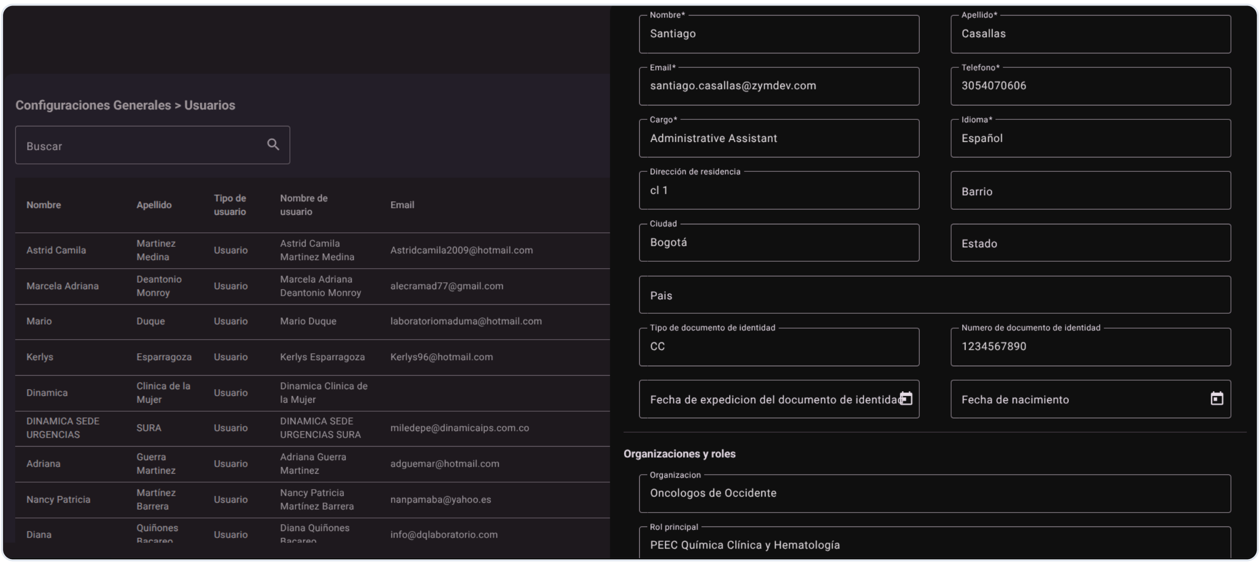
2. Add a New User

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

Add User

1. Click **"Add User"**.

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



3. Click **"Add"** to create the account.

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.

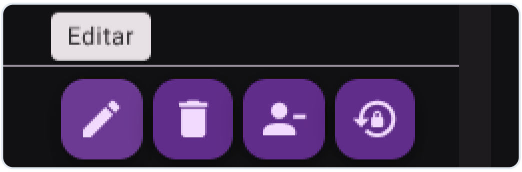
Add Patient

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

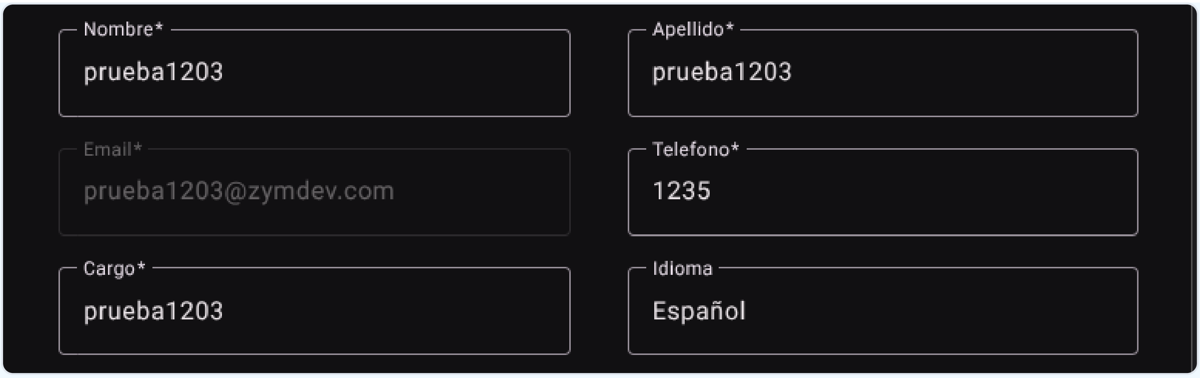
To modify the contact or work information of a registered user:

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.

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

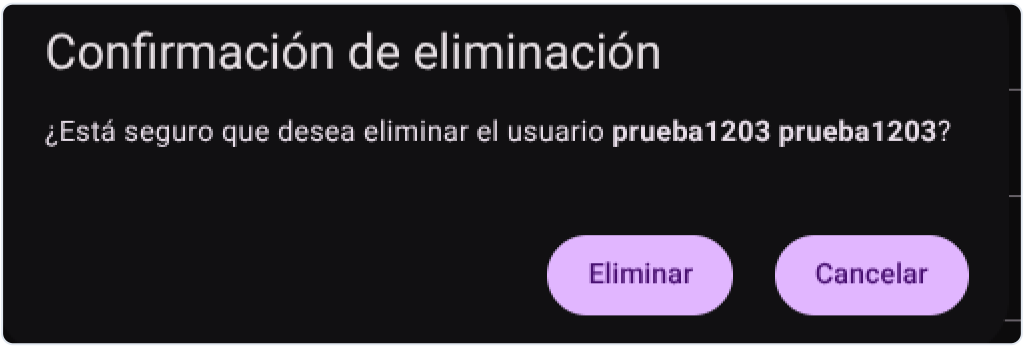


4. Delete a User

To permanently delete a user account:

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

2. confirm the action in the confirmation modal.

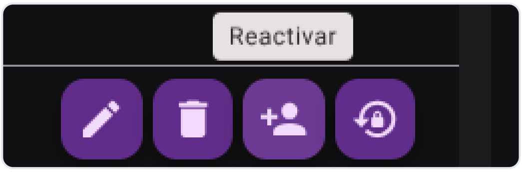


> **CAUTION:** Deleting a user is permanent and will erase their direct connection with the organization. If the user has associated historical records (such as process uploads or results entries), it is recommended to change their status to **Inactive** instead of deleting the account to preserve data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

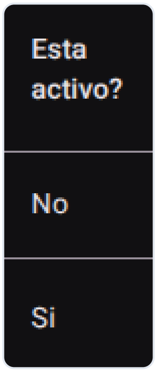
5. Activate or Deactivate User

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).

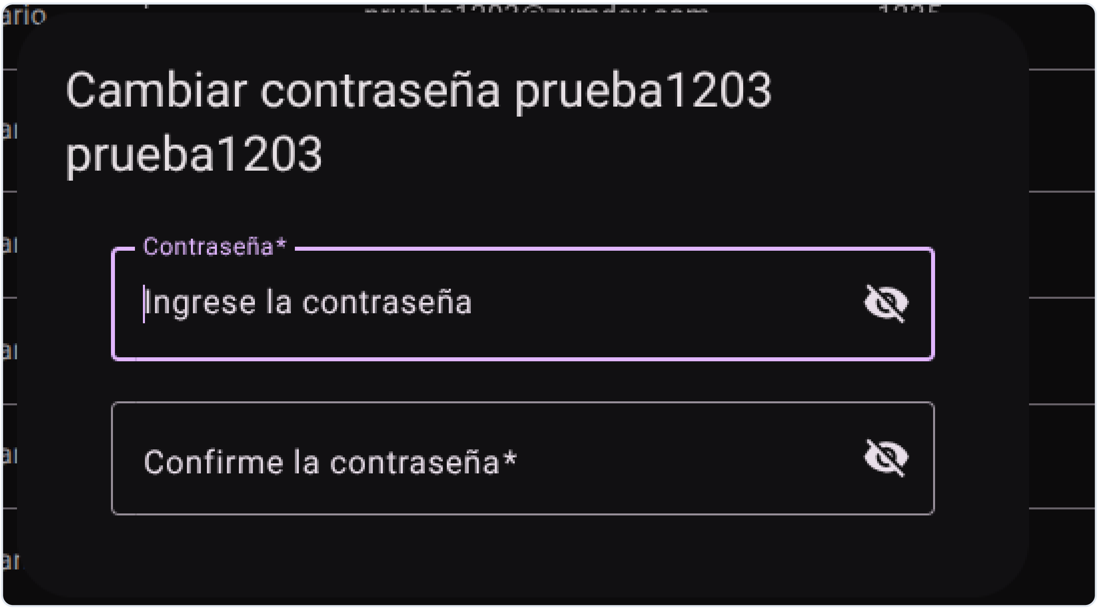


6. Change Password from the Administrator

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.

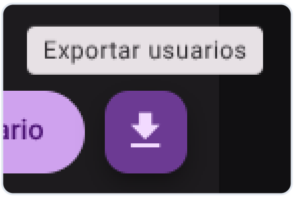
2. In the pop-up form, enter the new password and confirm it in the corresponding verification field.



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

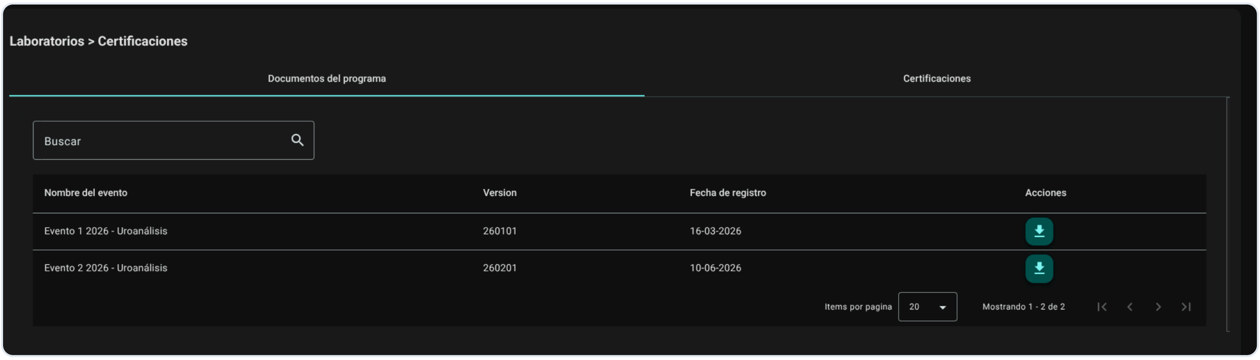
This module is used by:

- **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.

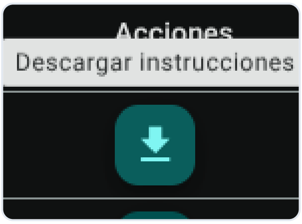
Possible Actions

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.



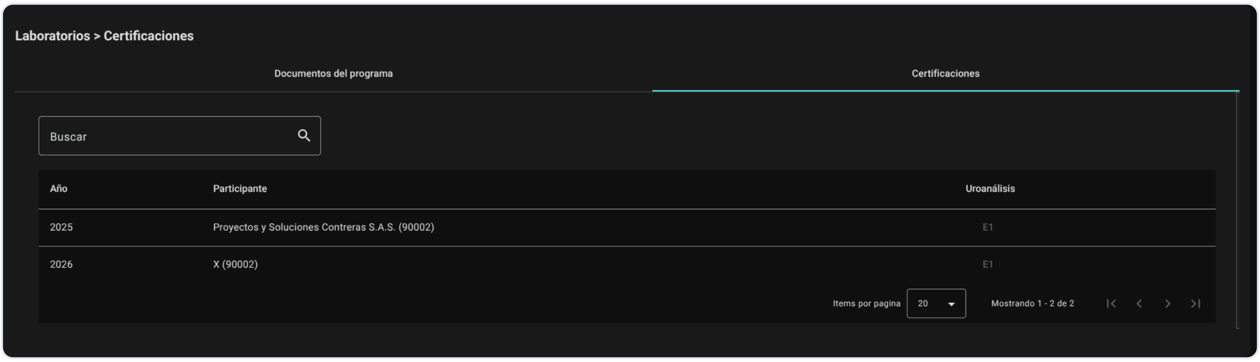
2. **Download instructions:** In the "Actions" column, locate the green download button (**Download Instructions**) corresponding to the desired record to obtain the instructional document. The download of the guide or instructions will begin directly when you press the action button.



---

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

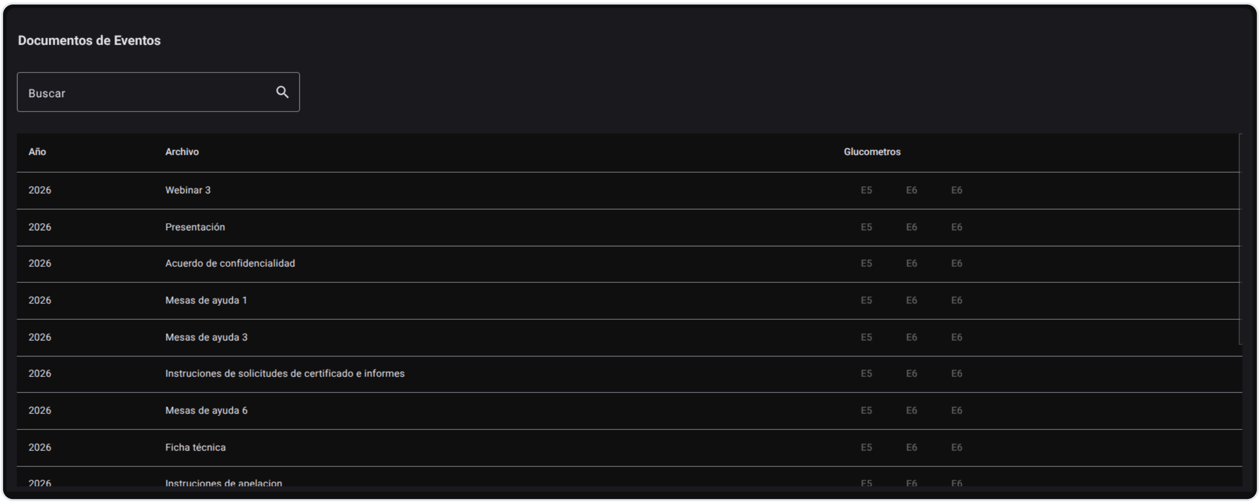
This module is used by:

- **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.



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

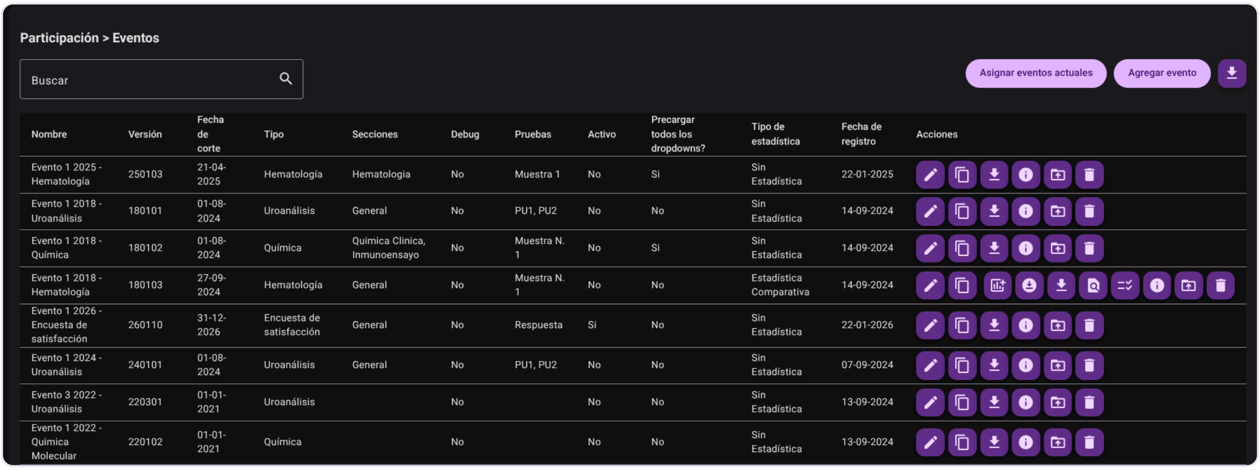
This module is used by administrators and technical directors to:

- **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

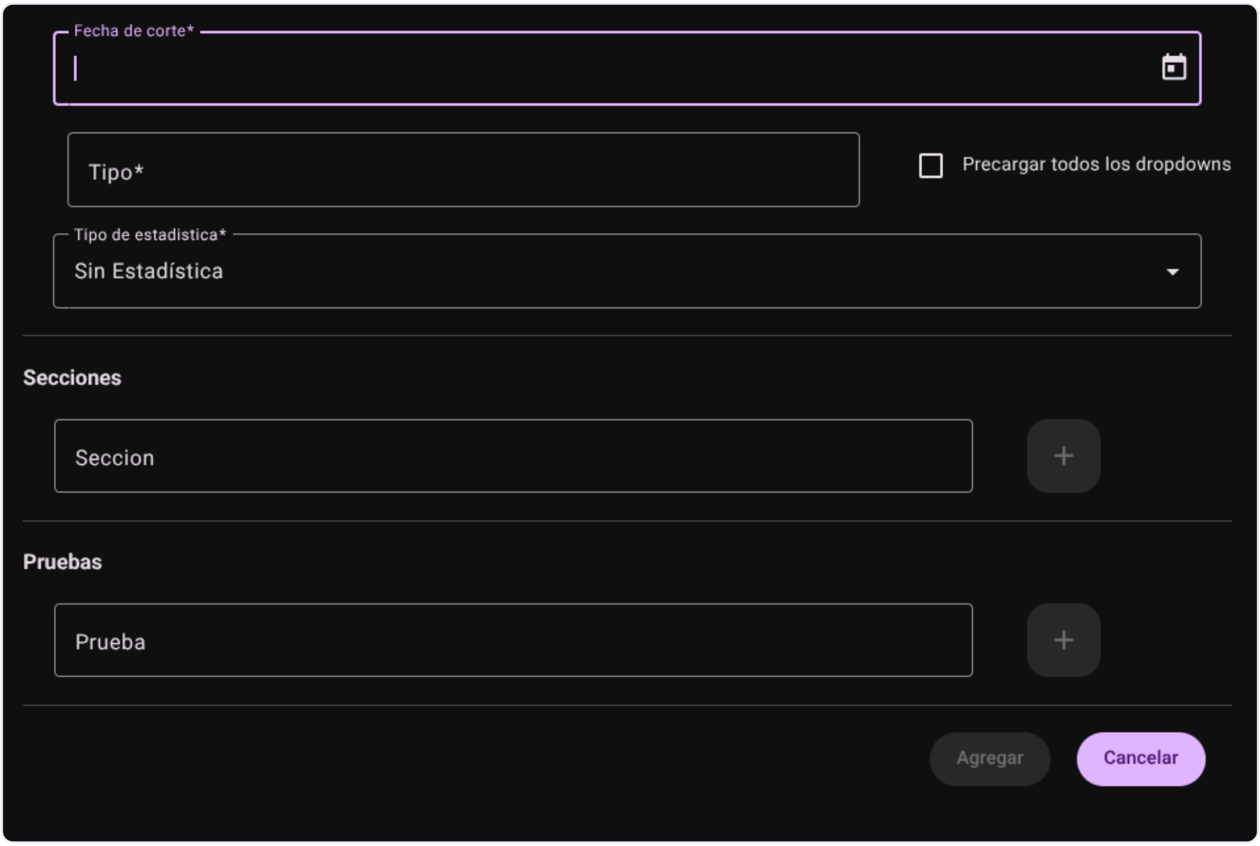
Agregar evento

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	Hematologia	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	Quimica Clinica, 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 - Quimica 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.

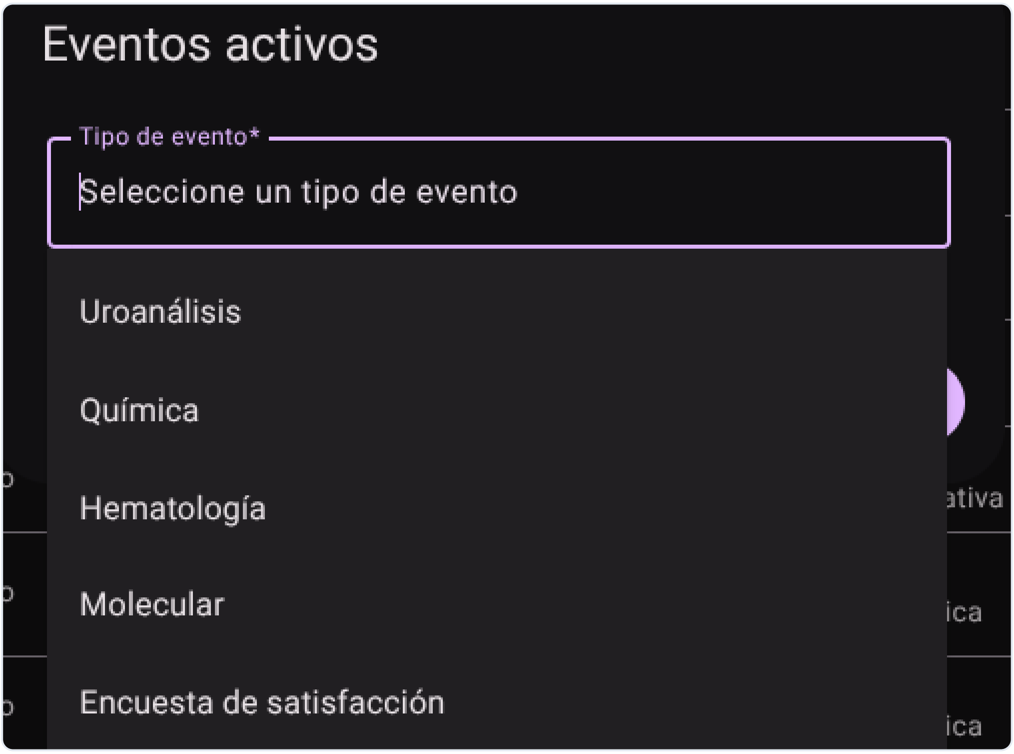


3. Click **Add** to log the event to the system.

3. Assign Current Events

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

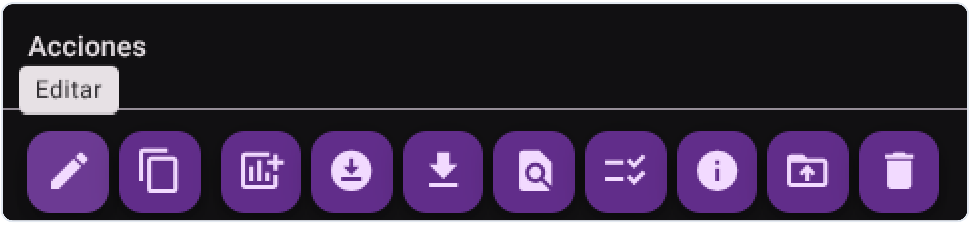
2. The system will display a list with the records available to the active period or work group.



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

4. Edit an Event

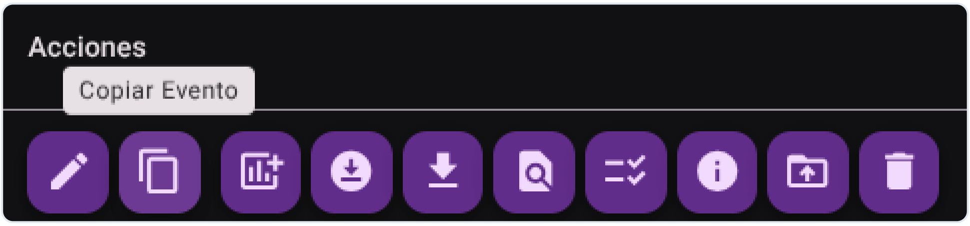
1. In the corresponding event row, locate the actions context bar and click on the **Edit** option (pencil icon).



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

5. Copy an Event (Duplicate)

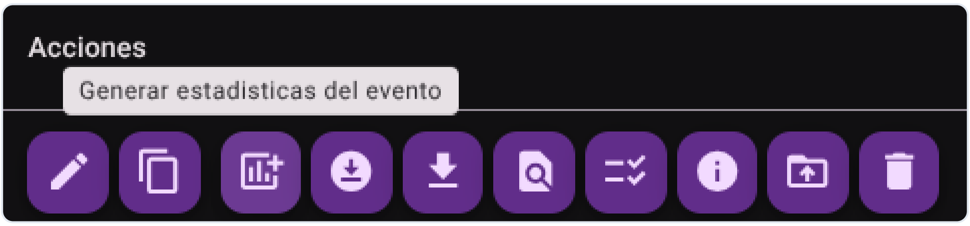
1. In the row of the event to duplicate, click on the **"Copy Event"** icon.



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

6. Generate Event Statistics

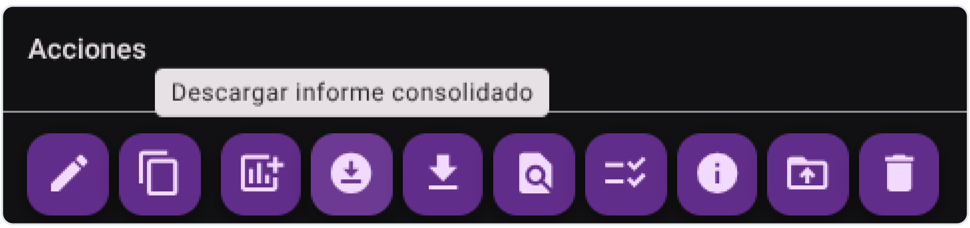
1. In the event row, click the **"Generate event statistics"** action.



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

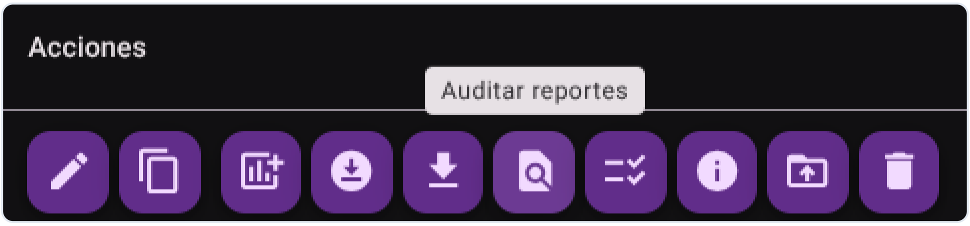
1. In the event row, click the **"Download Event Report / Consolidated"** icon.



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.



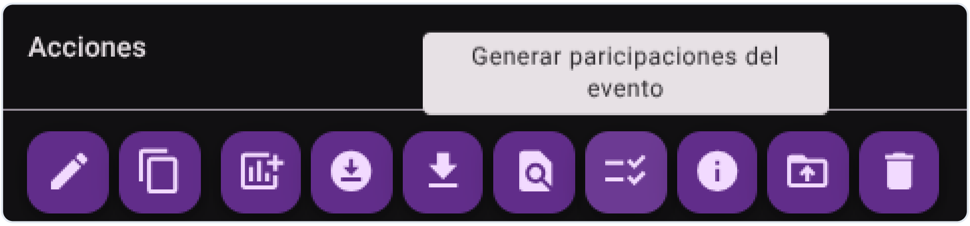
2. Review and validate the consistency of the reports generated before final publication.

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

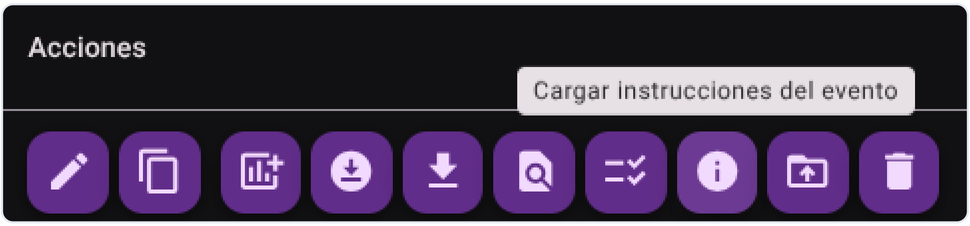
1. In the event row, click the **"Generate Entries"** action.



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

11. Upload event instructions

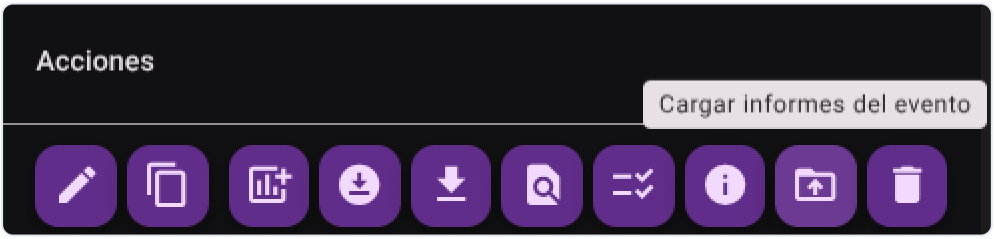
1. In the event row, click the **"Load Event Instructions"** action.



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

12. Upload Event Reports

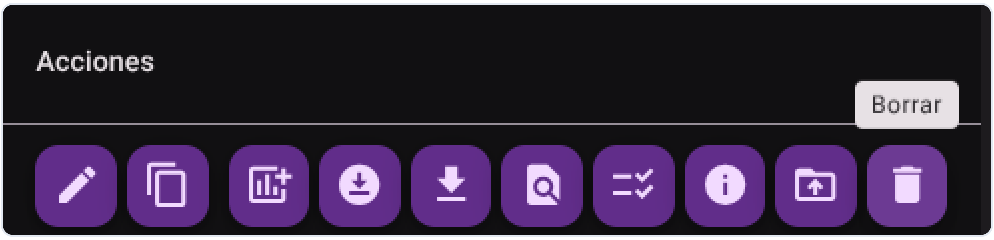
1. In the event row, click the **"Upload Event Reports"** action.



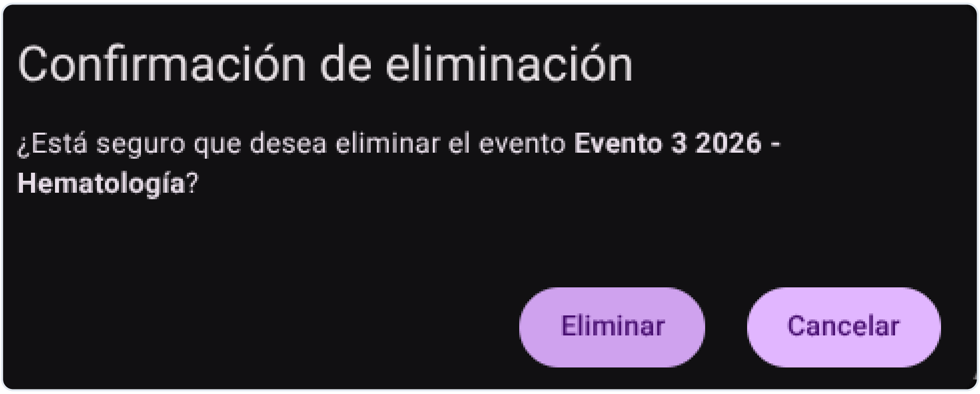
2. The system will load the corresponding event reports.

13. Delete an Event

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

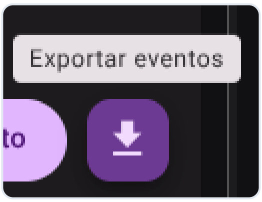


2. Confirm the action in the pop-up window to delete the event permanently.



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 ($x^$) *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.

Satisfaction Survey

Description, Purpose and Objective

> **NOTE:** The **Satisfaction Survey** view is the qualitative module in charge of collecting, structuring and evaluating the perception of users and organizations regarding the quality of the service, usability of the system and timeliness in delivering results.
>
> A **Satisfaction Survey** includes the following evaluation components:
>
> - **Event / Evaluated Round:** Cycle or period subject to feedback.
> - **Quiz Questions:** Likert scale ratings, multiple choice questions, and open fields for comments or observations.
> - **Traceability of Responses:** Record of date, issuing user and participating organization for statistical analysis.
>
> The objective of this view is to provide management with continuous improvement tools for making customer-oriented decisions.

Context of Use

This module is used by:

- **Analysts and Organization Users:** To record their perception of the technical attention and quality of the service received during the period.
- **Quality and Customer Service Managers:** To consolidate satisfaction indicators and formulate preventive and corrective action plans.

Possible Actions

1. Fill out the Satisfaction Survey

1. Select the event or period available for evaluation.
2. Answer the qualitative and quantitative questions presented on the screen:
   - **Service Rating:** Numerical or rating scale.
   - **Opportunity and Support:** Evaluation of compliance with deadlines and instructions.
   - **Free Comments:** Optional text area for observations or suggestions.
3. Click **"Submit Survey"**.

> *[Imagen ilustrativa: Formulario de Encuesta de Satisfacción]*

2. Consult the Response History

1. Access the consolidated satisfaction table.
2. Filter responses by event, date range, or organization using the **"Search"** search engine.
3. Export data for quality audits.

User Feedback Management according to ISO 15189 (Clause 8.6)

> **NOTE:**
>
> - **Measuring User Satisfaction:** The international standard ISO 15189 requires periodically collecting feedback from users regarding whether the services have met their needs and expectations.
> - **Opportunity Indicators:** The data collected on compliance with delivery deadlines for reports and instructions directly feeds management reviews and continuous improvement plans (PHVA cycle).

Required Technical Permits

- `satisfaction_survey_read` : Allows you to consult the survey form and history.
- `satisfaction_survey_create` : Authorizes the completion and sending of the satisfaction survey.
- `satisfaction_survey_export` : Allows you to download the consolidated responses.

Entry and Registration of Technical Competence Evaluations

Description, Purpose and Objective

> **NOTE:** The **Competency Assessment Entry** console is the operational interface designed to formally capture, complete and record the technical competency tests of the organization's health personnel.
>
> The purpose of this module is to centralize both the responses to aptitude evaluations (questionnaires and clinical cases) and the demographic, work and academic metadata of the evaluated participant. Its objective is to ensure compliance with accreditation and continuous certification regulations, guaranteeing that the history of technical qualification and suitability of laboratory analysts is robustly recorded in the system.

Context of Use

This panel is operated in the management routine by:

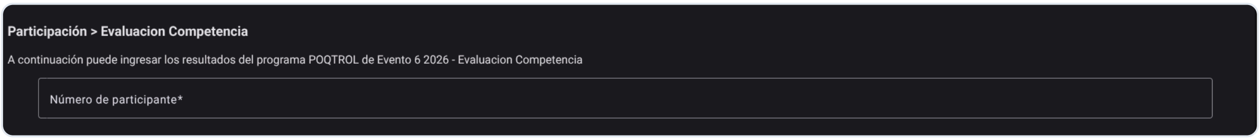
- **Laboratory Directors and Coordinators:** To supervise, apply and record the mandatory periodic evaluations of their collaborators.
- **Auditors and Quality Inspectors:** To verify the traceability and history of qualifications, certifications and academic training records of professionals linked to sample processing.

Step by Step for the Evaluation Record

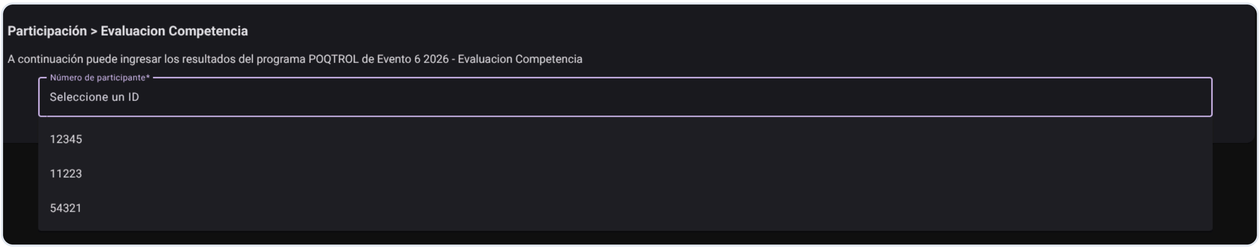
Follow the following instructions to correctly complete and store a competency assessment:

1. Identification and Loading of the Form

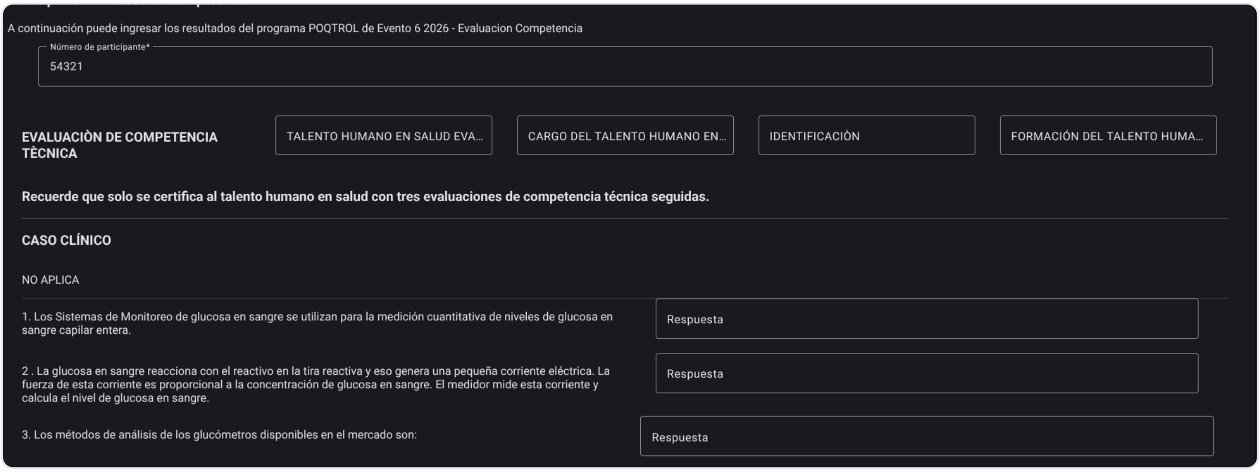
1. Go to the **Proficiency Assessment** screen.



2. Locate and click on the **Participant Number*** drop-down field.



3. Type or select from the autocomplete list the ID of the participant being evaluated.
4. When selected, the platform will automatically load the corresponding questionnaire and the tabs associated with the participant in the lower section.



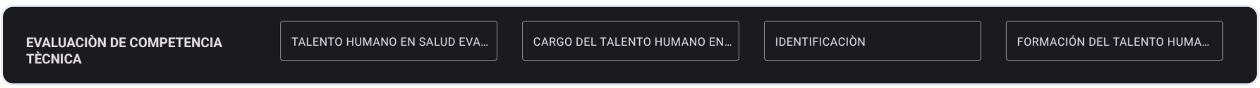
- *Regulatory Notice:* The system will display active certification notifications and regulatory notices on the screen (for example, the requirement and alert of the compliance status of three minimum consecutive evaluations to maintain the aptitude certification).

---

2. Navigation and Completion of Sections (Upper Tabs)

The registration form is divided into tabs that organize the required information clearly. Navigate between them to enter the information:

- **Technical Competence Evaluation:**
  - Presents the statements, clinical cases and technical questions assigned to the program.
  - For each question, click on the **Answer** field and select the alternative from the drop-down menu (supports multiple choice or *True / False* mode questions).
- **Evaluated Human Talent in Health:** Details the basic demographic information of the evaluated health professional.
- **Position:** Allows you to select and register the position or function that the person exercises within the laboratory structure.
- **Identification:** Registration and validation of the official identification document.
- **Training of Human Talent:** Structured field to record the academic training, postgraduate courses and current complementary courses of the participant.



3. Saving the Evaluation

1. Once you have completed the technical questionnaire and completed the demographic and position information in the upper tabs, scroll to the bottom of the screen.
2. Click the **Save** button.
3. The system will verify the integrity of the data entered. By confirming the transaction, you will save the answers and immediately update the participant's competition history in the database.

Assurance of Technical Competence according to ISO 15189 (Clause 5.1 / 6.2)

> **NOTE:**
>
> - **Mandatory Periodic Evaluation:** The international standard ISO 15189 requires periodically evaluating and documenting the technical competence of all personnel involved in the pre-analytical, analytical and post-analytical phases.
> - **Appropriateness and Re-training Criteria:** A score below the program's minimum threshold (typically $< 80%$) or critical errors in the resolution of clinical cases requires the immediate formulation of a plan for continuous technical training, temporary supervision of analytical runs and documented re-evaluation before reestablishing the unsupervised technical signature on patient results.

Roles and Permissions Required

The administration and registration of technical competence evaluations is regulated under the following security scheme:

The roles enabled to operate this console are **Technical Directors**, **Heads of Human Resources** and **Quality Coordinators**.

- **Reading and History:**
  - `family_competences_read`: Allows read access to the competency evaluation view, participant list and template upload.
- **Entry and Modification (Writing):**
  - `family_competences_create` / `family_competences_update`: Grant authorization to fill out technical questionnaires, modify position metadata and human talent identification, and save the completed form in the system.

- **Elimination:**
  - `family_competences_delete`: Allows you to discard or cancel evaluation records in case of administrative inconsistencies.

Quality Control in Glucometers (POCT)

Description, Purpose and Objective

> **NOTE:** The **Quality Control in Glucometers** console is the operational interface designed to capture, validate and record the results of quantitative tests and traceability metadata of glucometry devices in the POCT (*Point of Care Testing*) program.
>
> The purpose of this module is to monitor and record the analytical performance of each glucose measuring device assigned per participant in fitness events. Its objective is to ensure the traceability of the process by evaluating thermal stability criteria of the samples, batches and expirations of the reaction strips, and linking photographic evidence of the results reported in mg/dL to guarantee the consistency of the measurements at the points of medical care.

Context of Use

This panel is operated on a daily basis by:

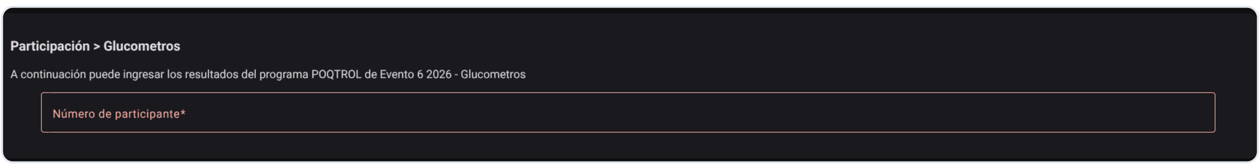
- **POCT Bacteriologists and Point of Care Operators:** To enter the readings of the decentralized glucometers corresponding to the program samples and upload the supporting images of the device screens.
- **Laboratory Directors and Quality Coordinators:** To verify the traceability of the equipment serial numbers, ensure that the test strips are not expired and validate the evidence of the readings.

Step by Step for Participation Registration

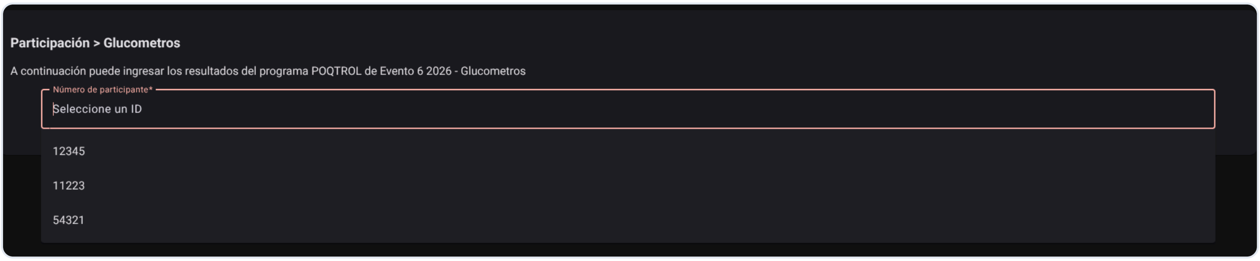
Follow the technical procedure to capture and store device measurements:

1. Uploading the Participant Form

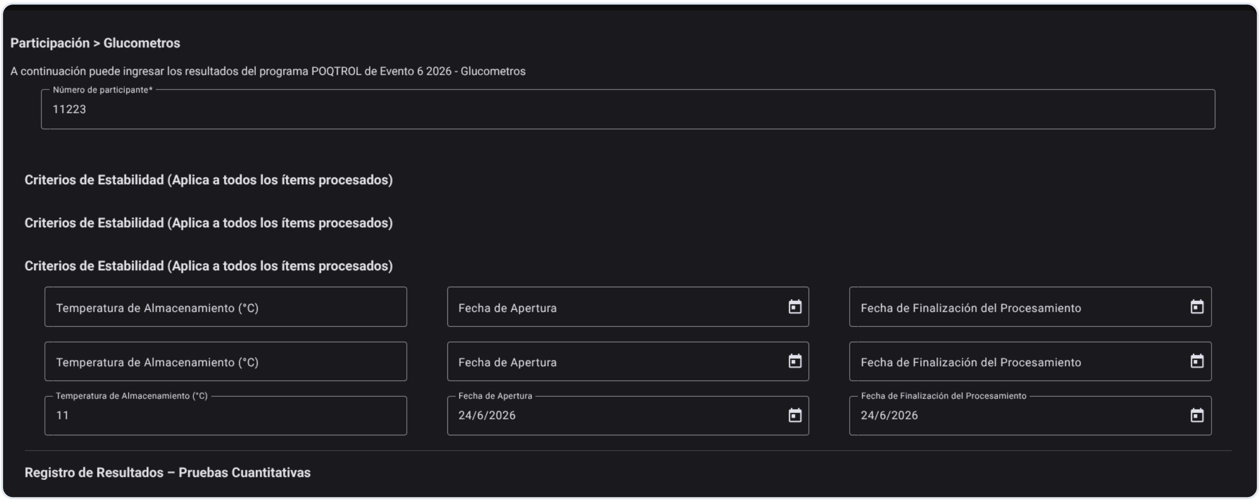
1. Go to the **Glucometers** module screen (access through Dynamic Event).
2. Click on the **Participant Number*** drop-down list.



3. Type or select from the autocomplete list the ID of the participant assigned to the event.



4. The system will automatically load the sample matrix and stability form corresponding to said participant.



---

2. Complete Sample Stability Criteria

Before recording individual sample readings, complete the curation metadata that applies to the entire block:

- **Storage Temperature (°C):** Enter the numerical value of the average temperature recorded in the area where the event samples were stored.
- **Opening Date:** Click on the field and select the processing start date from the calendar.
- **Processing Completion Date:** Define in the calendar the day on which the measurement of the sample block was completed.

---

3. Record Quantitative Results per Sample

For each of the clinical samples of the event (rows identified sequentially as A, B, C, D, etc.), complete the following fields in the matrix table:

1. **Location:** Indicate the service or area where the device is assigned (e.g. *Emergency Room*, *Floor 3*).
2. **Device:** Select the glucometer model used from the list of enabled devices.
3. **Device Serial:** Enter the unique serial number of the reading glucometer.
4. **Reported Result (mg/dL):** Enter the numerical value obtained after processing the physical sample.
5. **Lot of Strip Used:** Enter the lot reference printed on the packaging of the test strips.
6. **Strip Expiration Date:** Select the expiration date for the lot of strips on the calendar.
7. **Photographic Record:** Press the attachment upload button to upload the backup image (photograph of the glucometer screen that shows the filing and the test result).

---

4. Save Participation

1. Upon completing all assigned samples and stability fields, scroll to the bottom of the screen.
2. Review the system reminder alert: *"Remember to take the Technical Competency Assessment"*.
3. Click the **Save** button to consolidate the results.
4. The system will validate data consistency (avoiding logically inconsistent date ranges or empty batches) and save the entry to the database server.

Good Metrological Practices in POCT Testing (ISO 22870)

> **NOTE:**
>
> - **Strip and Expiry Control:** Never process samples with lots of strips whose expiration date has passed. Electrochemical biosensors based on glucose oxidase or glucose dehydrogenase experience loss of sensitivity and progressive enzymatic drift.
> - **Calibration Code Verification:** Make sure that the calibration chip or lot code programmed into the glucometer strictly matches the test strip bottle in use before lancing and reading.
> - **Photographic Support:** The uploaded image must clearly display the glucometer screen with the numerical value in mg/dL and the sample identifier, constituting the primary auditable evidence to certify the operator's competence in the quality assurance program.

Roles and Permissions Required

Data entry and consultation of participation in glucometers is governed by the following security scheme:

The roles authorized to enter this data are **Bacteriologist / POCT Analyst**, **Device Operator** and **Quality Director**.

- **Visualization and Consultation:**
  - `dynamic_event_read`: Allows read access to the glucometer event screen and upload of participant data.
- **Capture and Modification:**
  - `dynamic_event_create` /
- **Elimination:**
  - `dynamic_event_delete`: Allows you to discard or restart the results form in case of reevaluation authorized by the quality director.

Entry of Hematology Results

Description, Purpose and Objective

> **NOTE:** The **Hematology Results Entry** console is the specialized interface designed to capture, validate and record the numerical and methodological parameters corresponding to the blood count and differentiated cell count in the external quality evaluation program (PEEC).
>
> The purpose of this module is to unify the reporting of the participant's erythrocyte, platelet and leukocyte formula indices. Its objective is to ensure the traceability of the analyzer used and regulate the capture of cell counts (platelets, erythrocytes and leukocytes) by restricting entry to a single technology (Impedance or Optical) according to the physical principle of the equipment used, avoiding analytical inconsistencies and duplication in control statistics.

Context of Use

This panel is operated in the laboratory routine by:

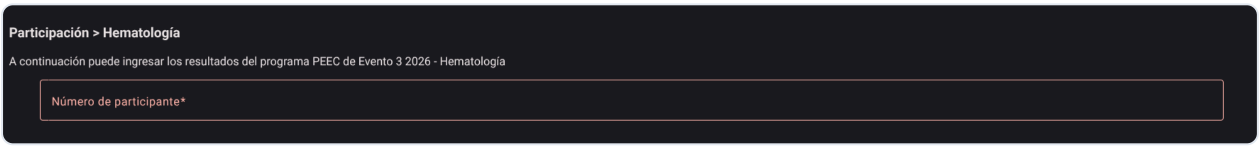
- **Bacteriologists and Hematology Specialists:** To enter the values obtained after processing the control samples of the program in the automatic analyzers and recording the parameters.
- **Quality Coordinators:** To audit the types of reading technology reported (impedance or optical) and electronically sign the secure submission of event participation.

Step by Step for Participation Registration

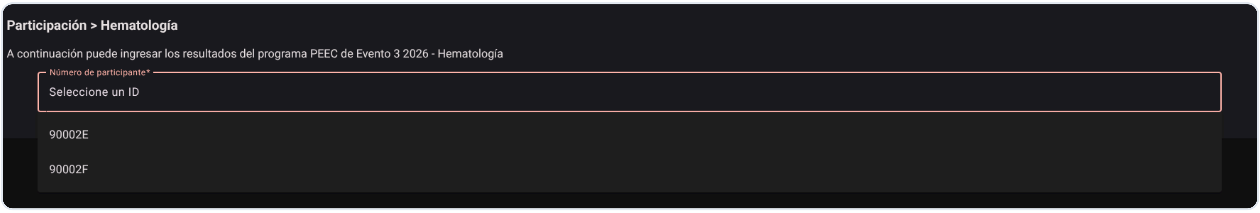
Follow the technical procedure to capture hematology profile data:

1. Instrument Loading and Traceability

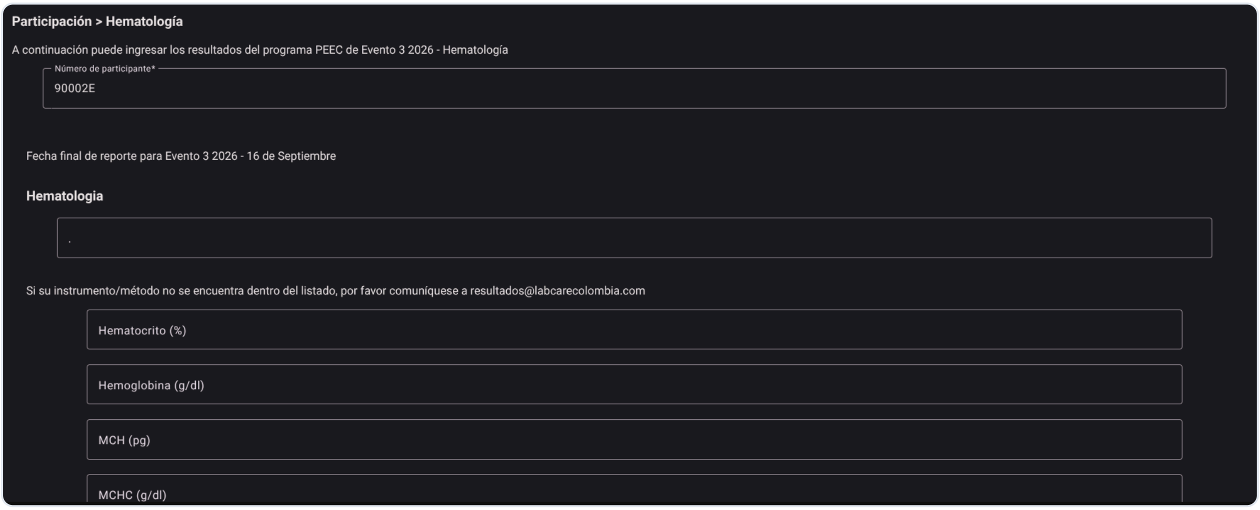
1. Access the **Hematology** screen (via the corresponding Dynamic Event path).



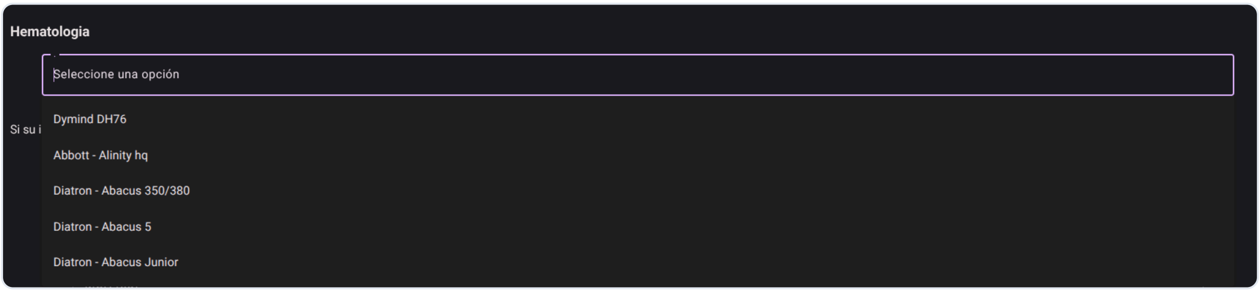
2. Click the **Participant Number*** drop-down field.



3. Type or select from the autocomplete list the ID of the participant assigned to the event.
    - *Note:* The selection of the participant will display the deadline for delivery of results and the form fields in the interface.



4. In the **Hematology** section, select the corresponding hematology analyzer from the active equipment drop-down list.
    - *Examples of options:* `Abbott - Alinity hq`, `Dymind DH76`, `Diatron - Abacus 350/380`, `Diatron - Abacus 5`, `Diatron - Abacus Junior`.
    - *Note:* If the model or brand of the equipment used by your laboratory does not appear in the drop-down list, the interface will tell you to contact the official technical support email displayed on the screen.



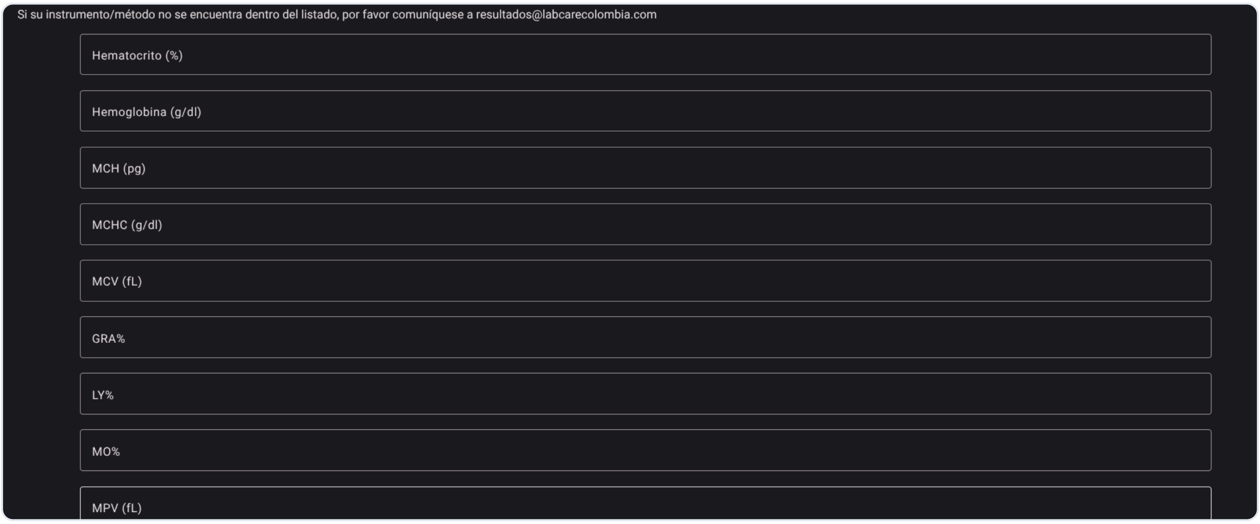
---

2. Capture of Quantitative Hematological Parameters

Enter the absolute numerical value reported by your analyzer for each of the blood cell parameters in the corresponding fields:

- **Hematocrit (%)**
- **Hemoglobin (g/dL)**

- **MCH (pg):** Mean Corpuscular Hemoglobin.
- **MCHC (g/dL):** Mean Corpuscular Hemoglobin Concentration.
- **MCV (fL):** Average Corpuscular Volume.
- **GRA%:** Percentage of Granulocytes.
- **LY%:** Percentage of Lymphocytes.
- **MO%:** Percentage of Monocytes.
- **MPV (fL):** Average Platelet Volume.
- **RDW %:** Erythrocyte Distribution Width.



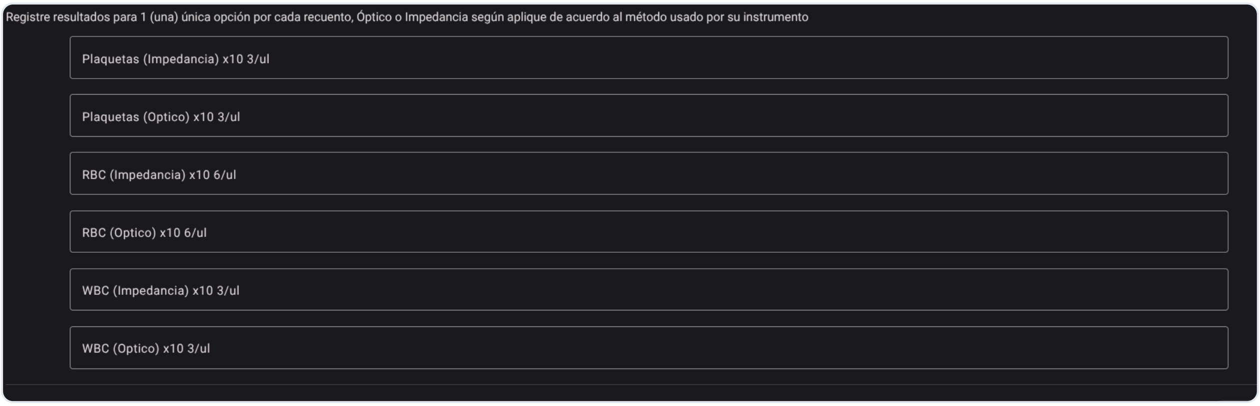
---

3. Cell Count Differentiated by Technology

> **IMPORTANT: Business Rule on Double Reporting:** Record the numerical value in **only one** of the options for each cell count. Select the **Impedance** or **Optical** column according to the physical principle used by your hematology analyzer. The system will block and disable the opposite cell automatically when detecting data entry, preventing calculation inconsistencies.

Complete as appropriate:

- **Platelets ($10^3/\mu\text{L}$):**
  - Enter the result in *Platelets (Impedance)* **OR** *Platelets (Optical)*.
- **Erythrocytes / RBC ($10^6/\mu\text{L}$):**
  - Enter the result in *RBC (Impedance)* **OR** *RBC (Optical)*.
- **Leukocytes / WBC ($10^3/\mu\text{L}$):**
  - Enter the result in *WBC (Impedance)* **OR** *WBC (Optical)*.


Registre resultados para 1 (una) única opción por cada recuento, Óptico o Impedancia según aplique de acuerdo al método usado por su instrumento

Plaquetas (Impedancia) x10 3/ul

Plaquetas (Optico) x10 3/ul

RBC (Impedancia) x10 6/ul

RBC (Optico) x10 6/ul

WBC (Impedancia) x10 3/ul

WBC (Optico) x10 3/ul

---

4. Saving the Report

1. Check carefully that all typed cells contain numerical values consistent with the specified units.
2. Scroll to the bottom right corner of the form.
3. Click the **Save** button.
4. The system will verify the matching rules (e.g. that there are no double captures in impedance/optical) and will definitively store the participation in the database.

Technical Validation Criteria and Rules of Three in Hematology

> **TIP: Analytical Quality Control Guidelines for the Bacteriologist:**
>
> - **Rule of Three (Hemoglobin vs. Hematocrit):** Verify basic agreement of erythrocyte indices in normocytic/normochromic samples: $$\text{Hematocrit (%)} \approx 3 \times \text{Hemoglobin (g/dL)} \pm 3$$
> - **Consistency of Corpuscular Indices (VCM, HCM, CHCM):**
> - $\text{VCM (fL)} = \frac{\text{Hto (%)} \times 10}{\text{RBC (}10^6/\mu\text{L)}}$
> - $\text{HCM (pg)} = \frac{\text{Hb (g/dL)} \times 10}{\text{RBC (}10^6/\mu\text{L)}}$
> - $\text{CHCM (g/dL)} = \frac{\text{Hb (g/dL)} \times 100}{\text{Hto (%)}}$
> - If $\text{CHCM} > 37.5\text{ g/dL}$, suspect hyperlipidemia, cold agglutinins, in vitro hemolysis, or mismatch in optical/photometric hemoglobin measurement before reporting.
> - **Technological Selection (Impedance vs. Optical):** Optical scattering or flow cytometry methods are preferable in samples with platelet aggregates or severe microcytosis where traditional electrical impedance may overestimate platelets or underestimate red blood cells.

Roles and Permissions Required

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

The roles enabled to interact with this console are **Bacteriologist / Hematology Analyst**, **Analyzer Operator** and **Quality Director**.

- **Access and Viewing:**
  - `dynamic_event_read`: Allows read access to the Hematology event screen (event code `03`) and search for the participant.
- **Capture and Insertion:**
  - `dynamic_event_create` /
- **Elimination:**
  - `dynamic_event_delete`: Enables cleaning or cancellation of the participation form for data re-entry.

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

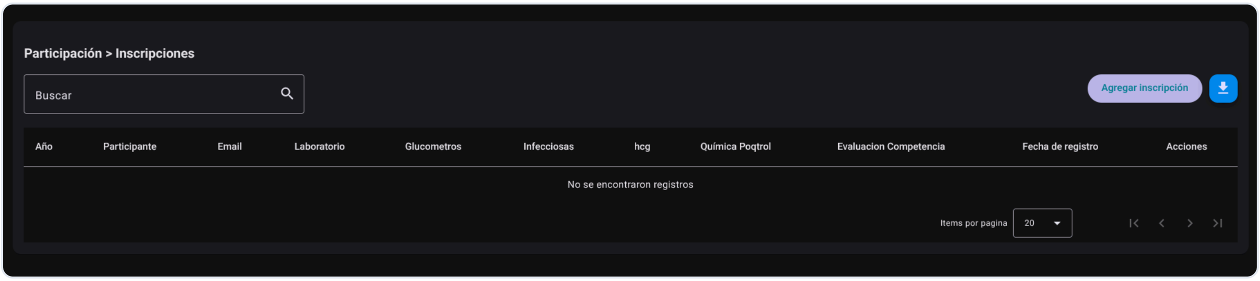
This module is used by administrative coordinators to:

- **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

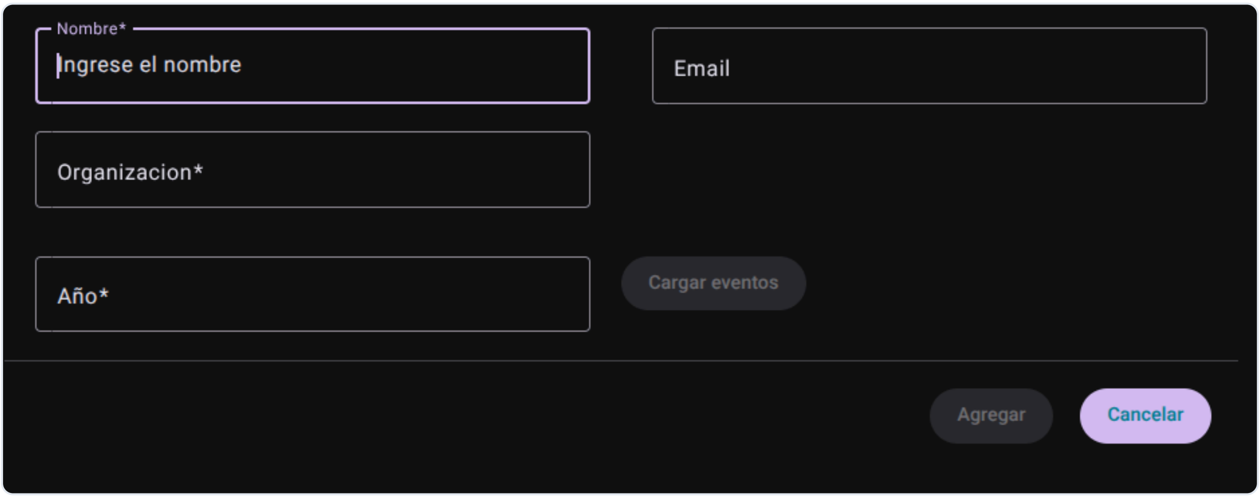
1. Use the search bar (**Search**) to quickly locate a participant by name, email, or organization.
2. Click on the header of any of the columns (*Year*, *Participant*, *Email*, *Organization*, etc.) to sort the table ascending or descending.
3. The list updates the data display in real time.



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

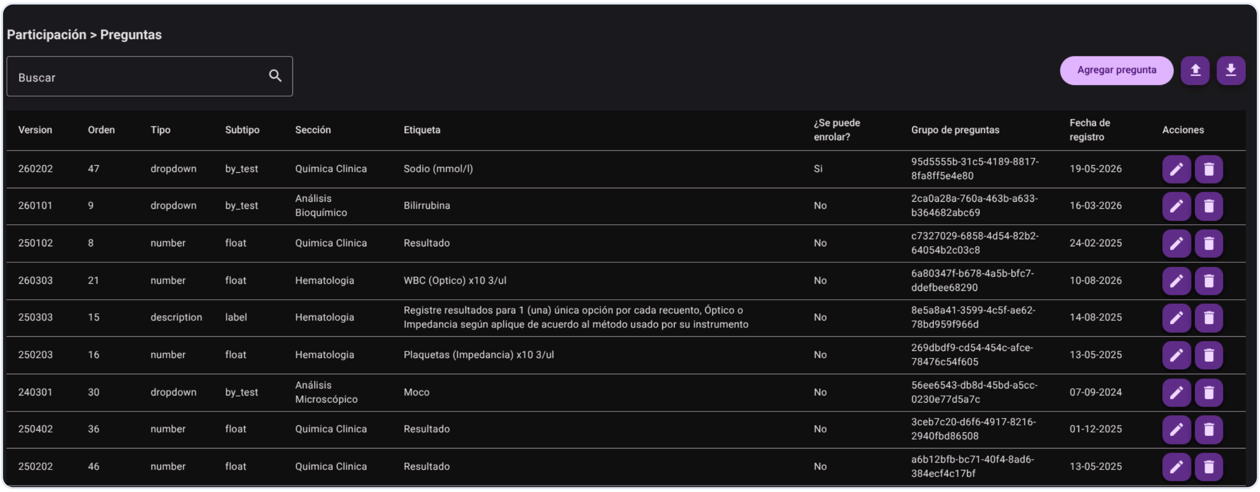
This module is managed by program designers and analytics coordinators to:

- **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

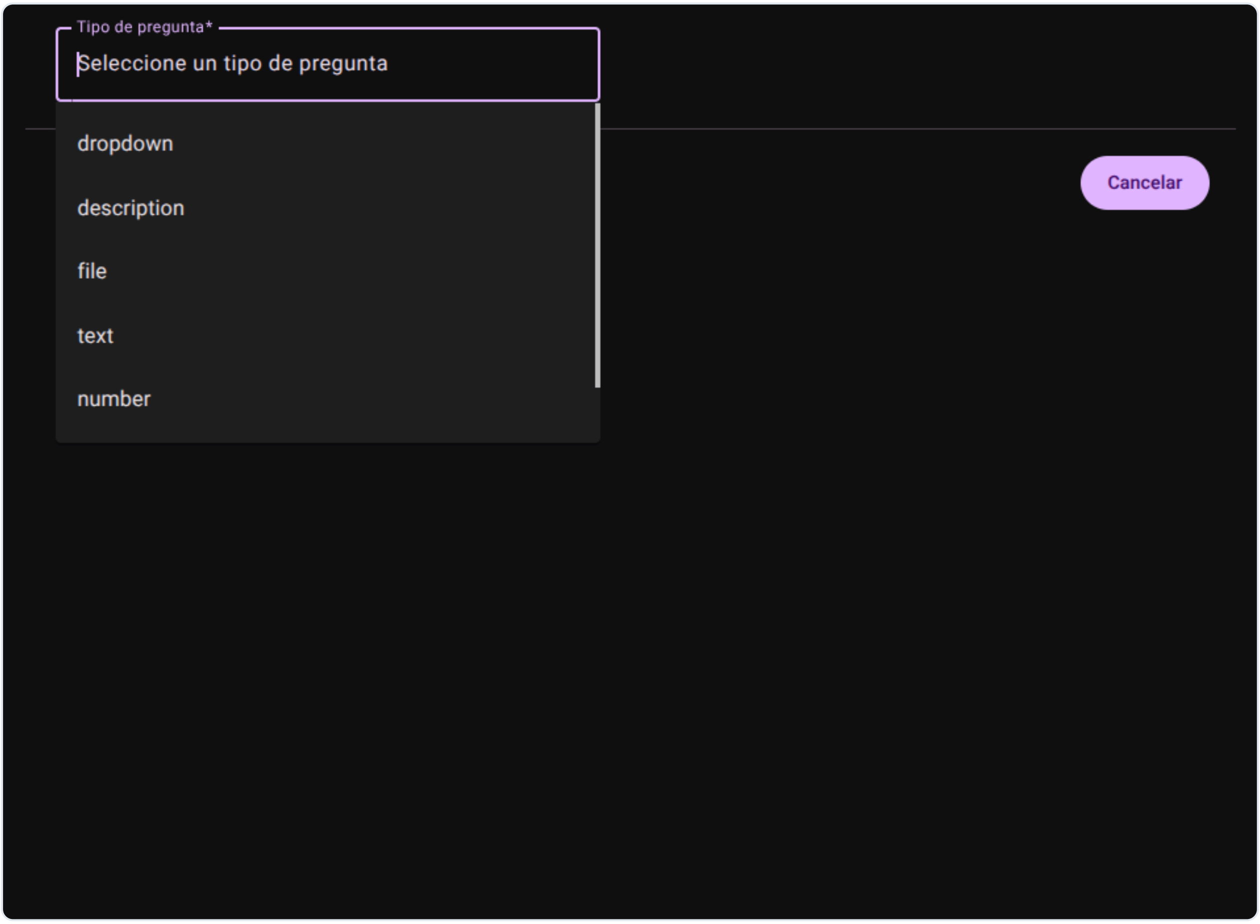
1. Use the search bar (**Search**) to find specific questions by statement, version or type.
2. Click on the header of any of the columns (*Version*, *Type*, *Registration Date*, etc.) to sort the list in ascending or descending order.



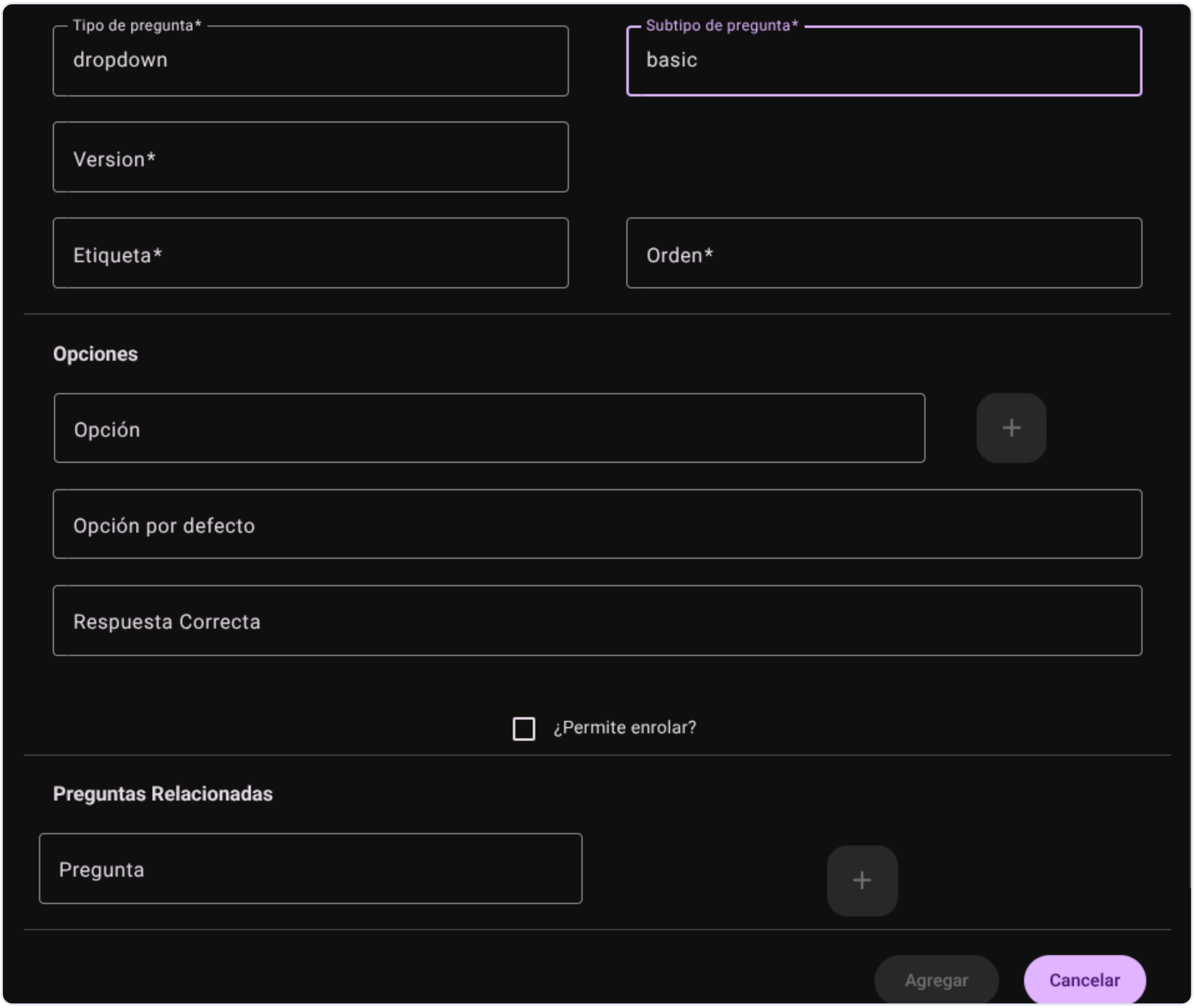
2. Create a New Question

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*).



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



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.

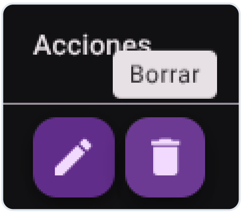
3. Edit an Existing Question

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

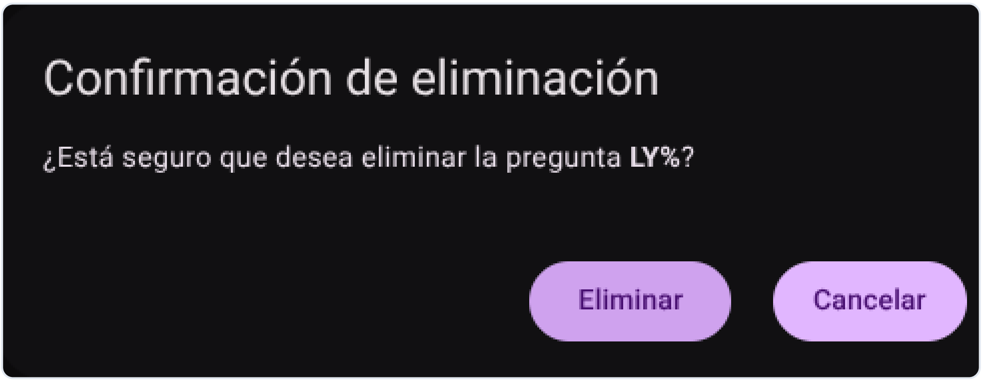
2. Open the side panel with the loaded information to modify the type, subtype, labels, order or validation options. 3. Press **"Update"** to update the question in the system.

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).

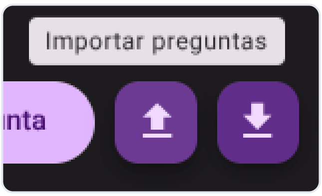


2. Confirm the action to permanently remove the question from the system.

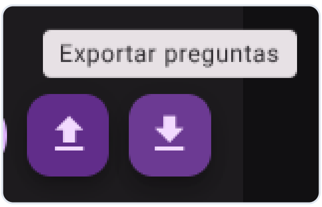


5. Import and Export Questions Massively

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

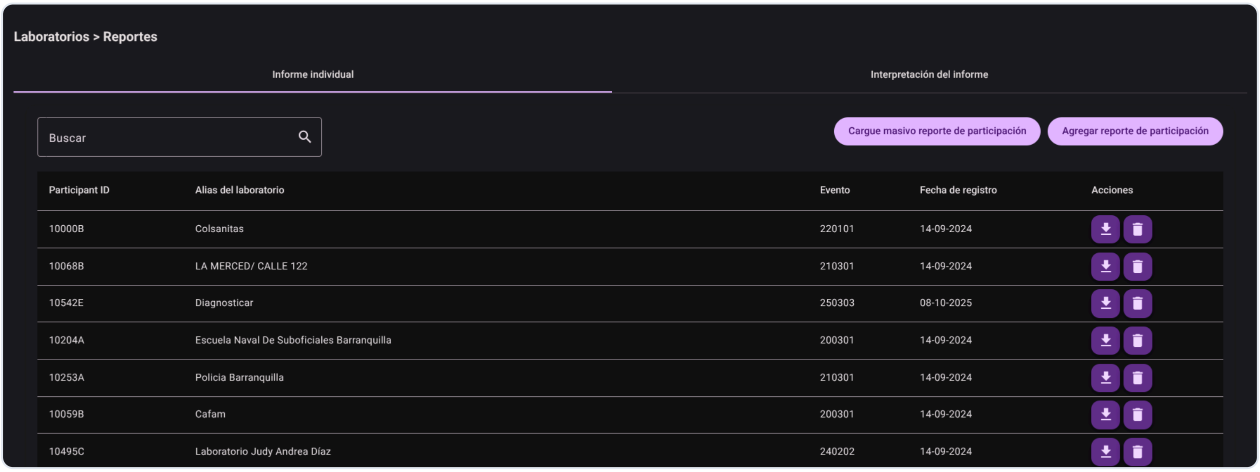
This panel is operated by:

- **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.

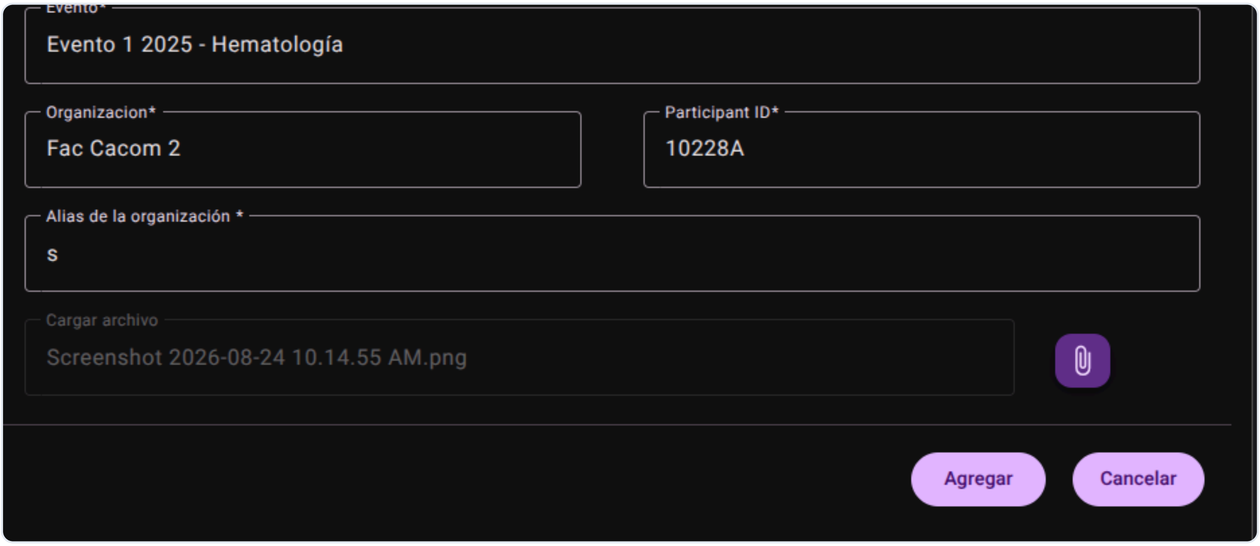


2. Upload an Individual Report (Administrator)

If you have editing privileges:

1. Click **"Add Participation Report"**.

2. 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.



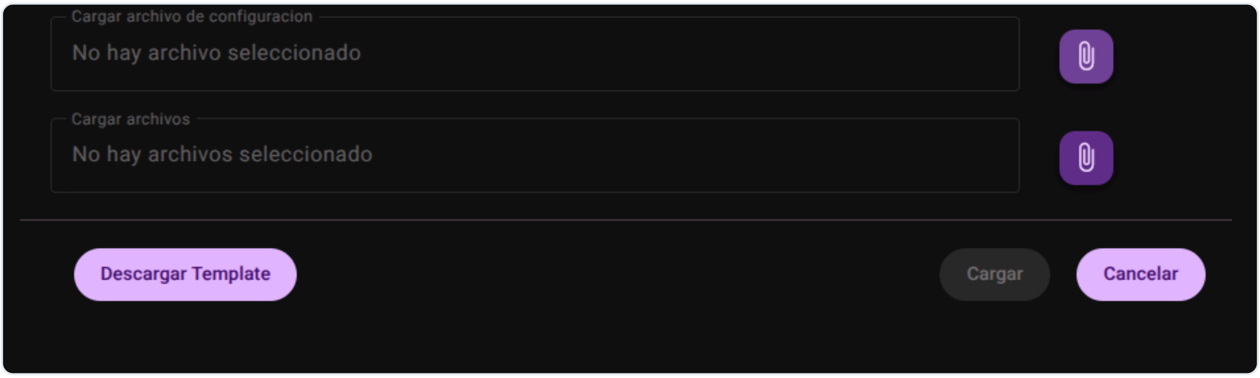
3. Click **"Add"** to publish the report.

3. Bulk Upload of Reports (Administrator)

To avoid uploading dozens of PDFs one by one:

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

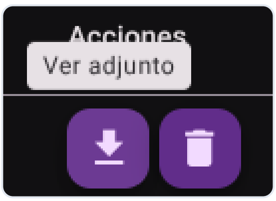
2. **Upload configuration file:** Upload a template file (CSV) that maps the PDF file name to the corresponding participant ID.
3. **Upload files:** Select and bulk upload all PDF files corresponding to the round.



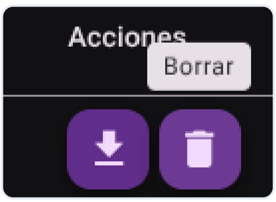
4. Click **"Upload"**. The system will automatically distribute the files to each participant according to the mapping matrix provided.

5. See current report attachment.

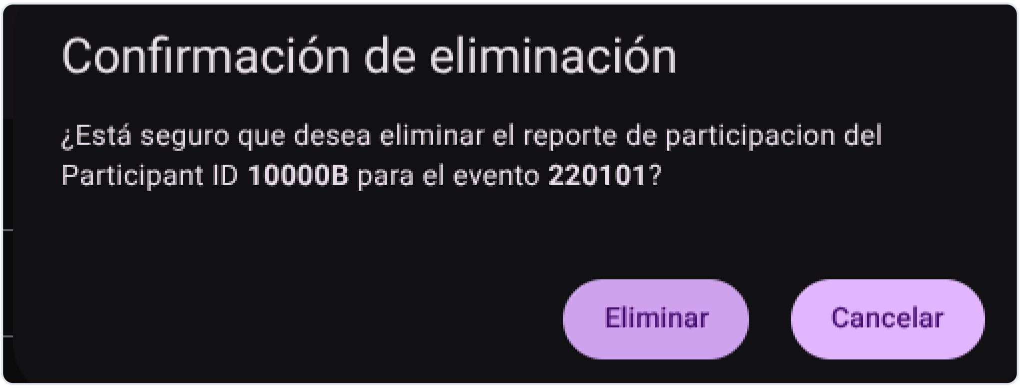
1. To see the report attachment you can click on the **Download** icon in the actions column.



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



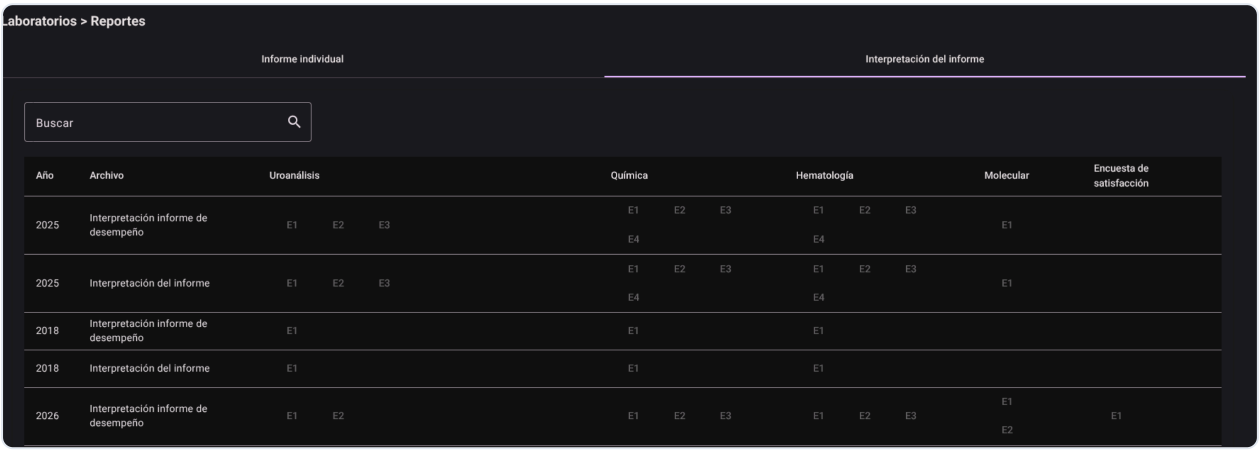
2. Confirm the action in the confirmation popup modal.



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.



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.

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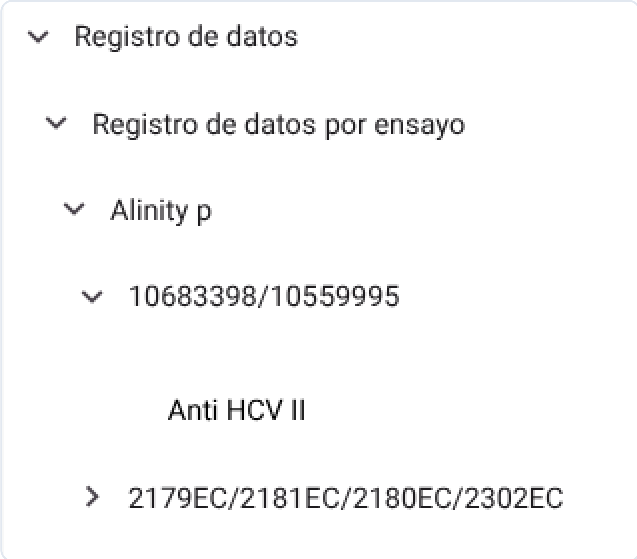
1. Navigation and Structuring (Left Side Panel)

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.



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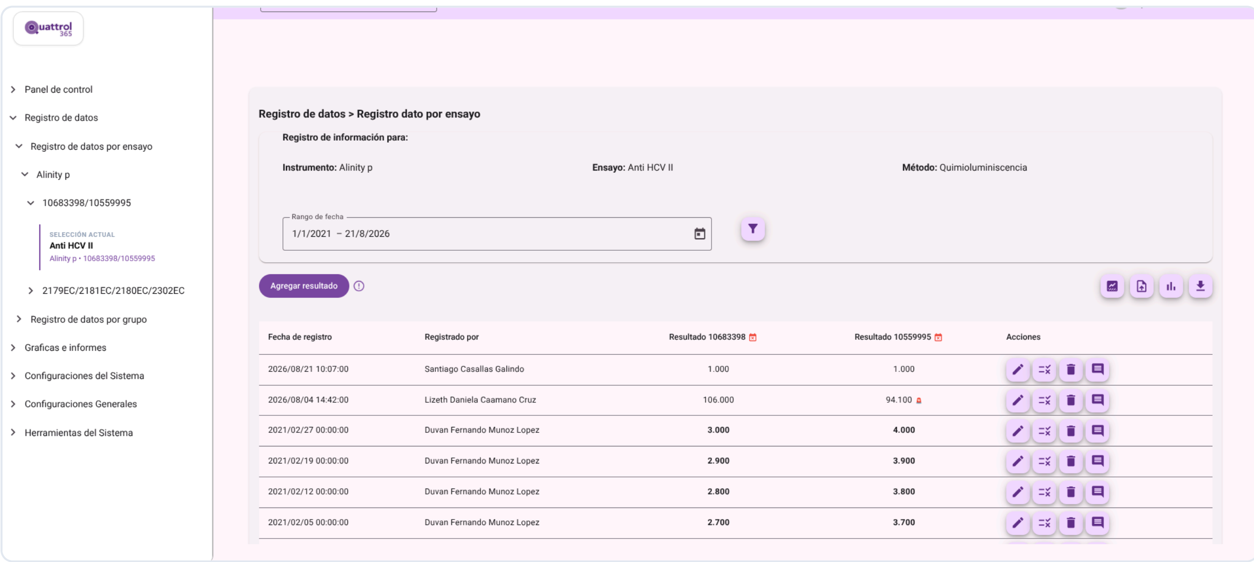
2. Submodule: Data Recording by Test

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

Header Information and Filters

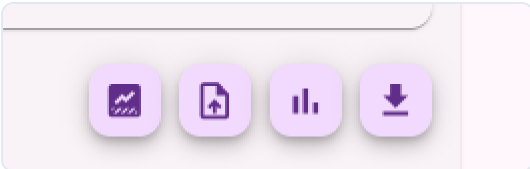
- **Test Metadata:** Displays the selected *Instrument*, *Test* and *Method* of analysis on a fixed card.
- **Filter by Date:** Allows you to delimit the query range (Start Date and End Date) using calendar selectors. Press the **Filter** button (funnel icon) to update the results history list.



Analytics and Export Toolbar (Top Right)

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

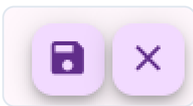
- **Import results:** Enables bulk import of results using flat data files.
- **Graphs:** Links directly to the interactive view of the **Levey-Jennings Graphs** and Pair Graphs of the essay.
- **Results:** Loads the detailed table view with the chronological measurement log.
- **Histogram:** Generates 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.

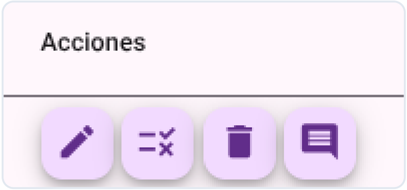


Record History Management (Actions Column)

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.

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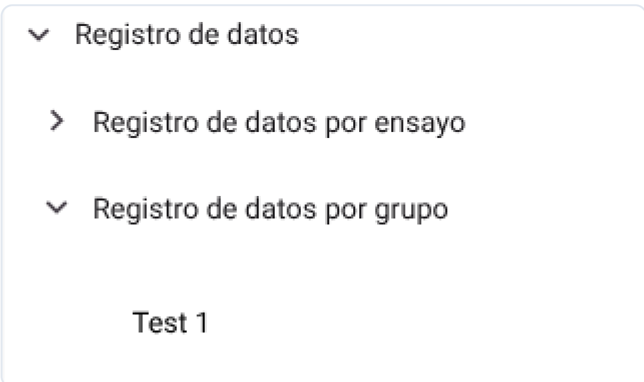
3. Submodule: Data Registration by Group

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**.



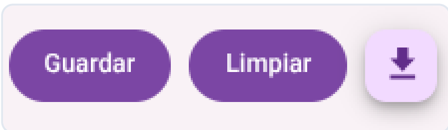
Mass Capture Grid

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.

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 1_{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.