



Personalized Documents in OpenCms

Dr. Martin Abel
General Manager
Plambeck Health GmbH

Agenda

Plambeck Health

Requirements for Document Management

An OpenCms Solution

- Organizational Units
- XML Documents
- Editor
- Format Policy
- Metadata

Workflows

- Document setup
- Request/Response
- Obsolete Document

Questions

About Plambeck Health

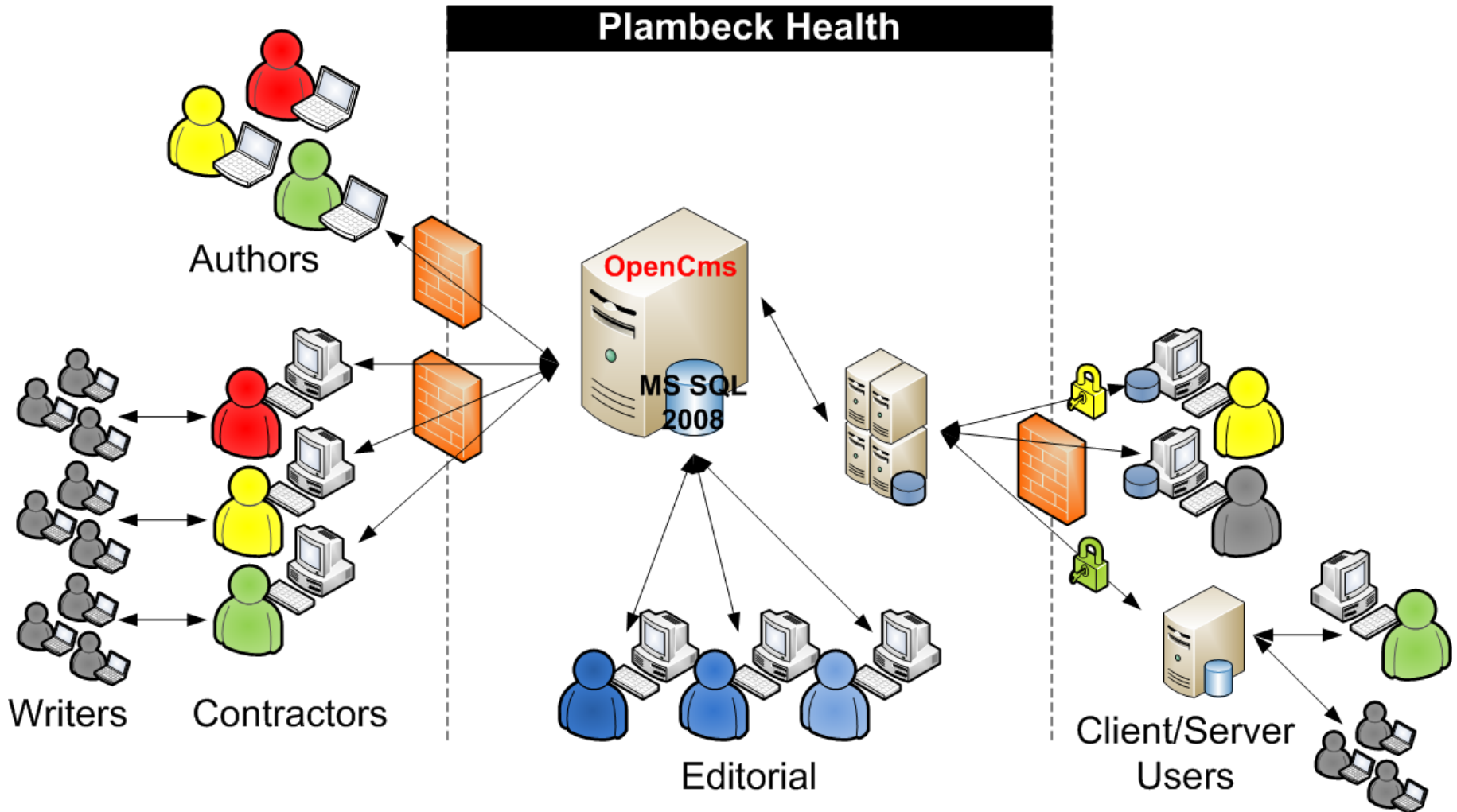
- 100% Investment of Plambeck Holding AG, Cuxhaven



- located in Hamburg
- 25 People (50:50)
- Medical information and software
 - Patient Information and Communication System



Basic Infrastructure



Agenda

Plambeck Health

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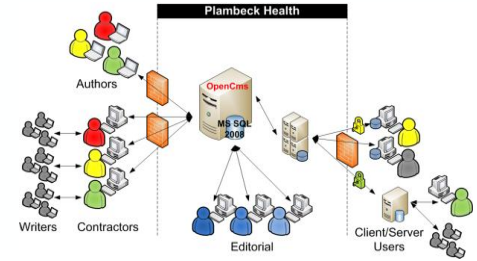
Workflows

- Document setup
- Request/Response
- Obsolete Document

Questions

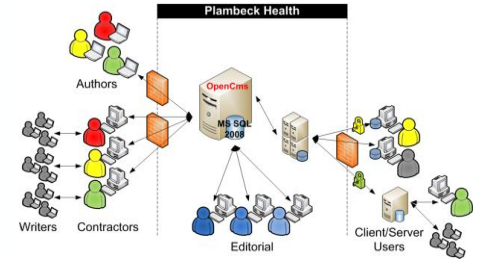
CMS Requirements

- Authors
 - Internet access with personal login
 - High performant
 - Import & Export functionalities (esp. with MS-Word)
 - Easy to use GUI
 - Locale language
 - Explorer to navigate
 - MS-Word editor with WYSIWYG & track changes
 - Galleries
 - No format restrictions, esp. extensive copy & paste (text, pictures, documents)
 - Delegation options
 - Stuff
 - Ghostwriters
 - Reviewers
- Users
 - Well structured, consistent and standardized documents
 - Sophisticated search functionality



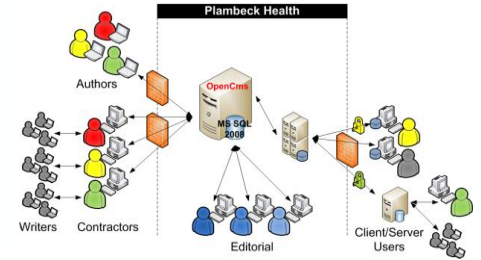
CMS Requirements

- Plambeck Health (Editorial)
 - Internet solution
 - Central user accounting
 - Self-managed contractor group accounting
 - Structured documents
 - Strong document types with given theme blocks
 - Block content and format policy
 - Metadata
 - Search indexing
 - Target groups
 - W3C XML document export (!)
 - Intuitive User Interface (GUI)
 - Explorer view
 - MS-Word-like editor with WYSIWYG
 - Supporting the format policy (and MS-Word „file import“)
 - Link validation
 - Localization
 - German/English
 - High performance



CMS Requirements

- Plambeck Health
 - Roles and responsibilities for editors
 - Document history
 - Versioning
 - Recover and callback
 - Workflows
 - Manage standardized processes
 - Document setup
 - Document release management
 - Document closing process
 - Triggers and reminders
 - Assign & track tasks
 - Support for
 - Context related messaging and callbacks
 - Mail notify
 - etc.



Agenda

Plambeck Health

Requirements for Document Management

An OpenCms Solution



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- Editor
- Format Policy
- Metadata

Workflows

- Document setup
- Request/Response
- Obsolete Document

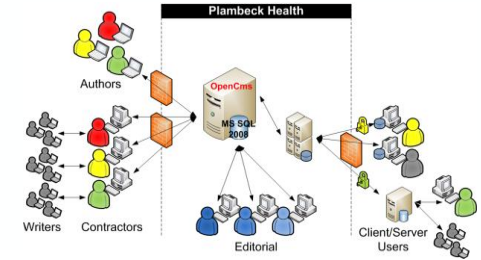
Questions

An OpenCms Solution

-  OpenCms
 - Complete solution for WebSites
 - open source, no secrets
 - Fire proofed, stable and performant
 - Comprehensive „framework“ for document management
 - Comes with a lot of additional „basic functionalities and tools“
 - Designed for customization
 - Customization for Plambeck Health
 - **comundus**,  Waiblingen

User Management

- Organizational Units (OU) support centralized user accounting and self-managed delegation
- Groups, Roles & Permissions define detailed accessibility rights and responsibility sharing



Account Management Up

Overall Tools

Users Overview Groups Overview

Organizational units to administrate

Organizational units to administrate (18)

Search

| O | U | G | Description |
|---|---|---|-------------------------------------|
| | | | root organizational unit |
| | | | Plambeck |
| | | | eVation Medical Consult |
| | | | Test OU Exxeta |
| | | | Grepect GmbH |
| | | | Institut für Kreatives und Therapie |
| | | | Lese OU |
| | | | Med. Presse- & Informationsdienst |
| | | | Redaktionsbüro Brummerloh |
| | | | Redaktionsbüro Lauff |
| | | | Redaktionsbüro Sonntag |
| | | | Redaktionsbüro Therapieassistent |
| | | | Redaktionsbüro Voos |
| | | | Redaktionsbüro Waldhausl |
| | | | Reuter Medical |
| | | | Veterinärmedizin |

Select view: Summary Details

There are no responsables for this resource.

User permissions

Inherited from parent folders

- All others
- Peter Reuter (Peter.Reuter) (+w)
Reuter Medical (/Reuter-Medical/)
- (ATT-Chefredakteur) (+r+v)
root organizational unit
- (ATT-Redakteur) (+r+v)
root organizational unit
- users group (Users) (+r+v)
root organizational unit
- Root administrator (+r+w+v+c+d)

Add a user/group access control entry

Group:

Resource permissions

Internal use only Set

| Resource | Permission | Allowed |
|---------------------|------------|-------------------------------------|
| users group (Users) | Read | <input checked="" type="checkbox"/> |

Edit User Roles: Martin.Abel Up

Identification

Login name: Martin.Abel
Last name: Abel
First name: Martin

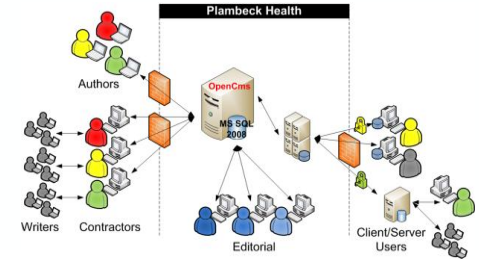
Roles

Roles (9)

| R | A | Name | Dependency |
|-------------------------------------|-------------------------------------|----------------------|--|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Root administrator | Users having this role have all permissions in the entire system. |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Administrator | Users having this role have all permissions in the given organizational unit. |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Account manager | Administrator |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Project manager | Administrator |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | VFS resource manager | Administrator |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Template developer | Administrator, VFS resource manager |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Workplace user | Database manager, VFS resource manager, Project manager, Workplace manager, Administrator, Template developer, Account manager |

Documents

- Explorer view
- Strongly structured document types with given theme blocks
- Metadata



Project Offline - root organiza Site /sites/default/ View Explorer

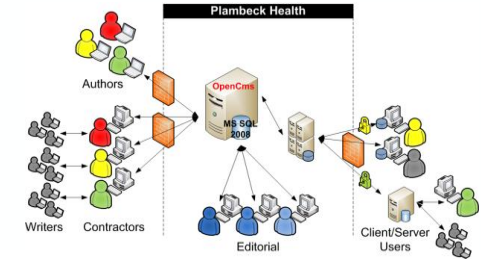
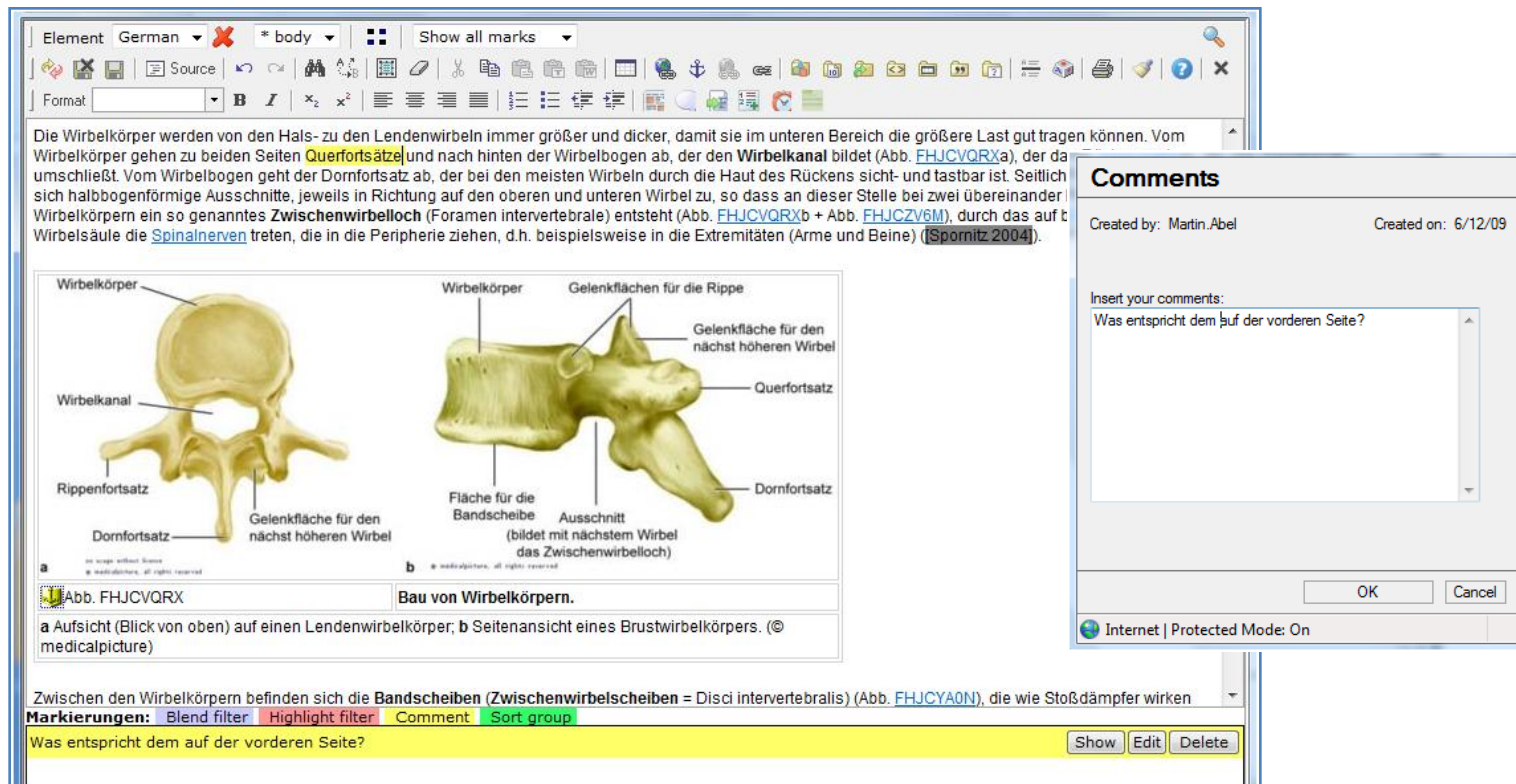
Back Upload Search New Level Up Location /Artikel/Bandscheibenvorfall/

| Name | Title | Size |
|--------------------|-------------------------------------|-------|
| filters | | |
| tmp | don't delete this folder | |
| 01_Zusammenfassung | Zusammenfassung | 1844 |
| 02_Beschreibung | Beschreibung der Krankheit | 27163 |
| 03_Ursachen | Ursachen | 9363 |
| 04_Symptome | Symptome | 11551 |
| 05_Komplikationen | Komplikationen | 8932 |
| 06_Untersuchungen | Untersuchungen zur Diagnosestellung | 9388 |
| 07_Heilmethoden | Heilmethoden/Therapien | 27497 |
| 08_Prognose | Prognose | 3996 |
| 09_Vorbeugung | Vorbeugung/Prävention | 1533 |
| 10_Tipps | Praktische Tipps | 1424 |
| 11_Aktuelles | Aktuelles | 2681 |
| metadata.xml | | 1533 |

**herniated vertebral disc
slipped disc**

Editor

- Block content and format policy
- MS-Word-like editor with WYSIWYG
 - Supporting the format policy
 - Supporting data import from MS-Word

The screenshot shows the OpenCms editor interface. The main text area contains a paragraph about vertebrae: "Die Wirbelkörper werden von den Hals- zu den Lendenwirbeln immer größer und dicker, damit sie im unteren Bereich die größere Last gut tragen können. Vom Wirbelkörper gehen zu beiden Seiten **Querfortsätze** und nach hinten der Wirbelbogen ab, der den **Wirbelkanal** bildet (Abb. FHJCVQRXa), der da umschließt. Vom Wirbelbogen geht der Dornfortsatz ab, der bei den meisten Wirbeln durch die Haut des Rückens sicht- und tastbar ist. Seitlich sich halbboogenförmige Ausschnitte, jeweils in Richtung auf den oberen und unteren Wirbel zu, so dass an dieser Stelle bei zwei übereinander Wirbelkörpern ein so genanntes **Zwischenwirbelloch** (Foramen intervertebrale) entsteht (Abb. FHJCVQRXb + Abb. FHJCV6M), durch das auf t Wirbelsäule die **Spinalnerven** treten, die in die Peripherie ziehen, d.h. beispielsweise in die Extremitäten (Spornitz 2004).

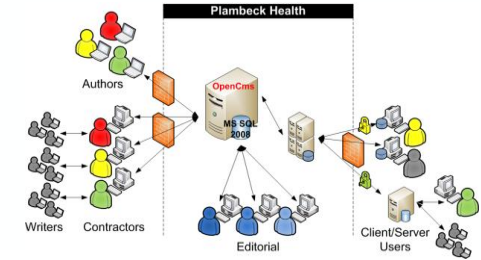
Below the text is a diagram titled "Bau von Wirbelkörpern." showing two views of a vertebra: (a) top view of a lumbar vertebra and (b) side view of a thoracic vertebra. Labels include: Wirbelkörper, Wirbelkanal, Rippenfortsatz, Dornfortsatz, Gelenkfläche für den nächst höheren Wirbel, Gelenkflächen für die Rippe, Gelenkfläche für den nächst höheren Wirbel, Querfortsatz, Fläche für die Bandscheibe, Ausschnitt (bildet mit nächstem Wirbel das Zwischenwirbelloch), and Dornfortsatz.

A "Comments" dialog box is open on the right, showing "Created by: Martin.Abel" and "Created on: 6/12/09". The text area contains "Insert your comments:" and "Was entspricht dem auf der vorderen Seite?". Buttons for "OK" and "Cancel" are visible.

At the bottom of the editor, there is a status bar with "Markierungen: Blend filter, Highlight filter, Comment, Sort group" and a yellow highlighted area with the text "Was entspricht dem auf der vorderen Seite?" and buttons for "Show", "Edit", and "Delete".

Format Policy

- Restricted format tools

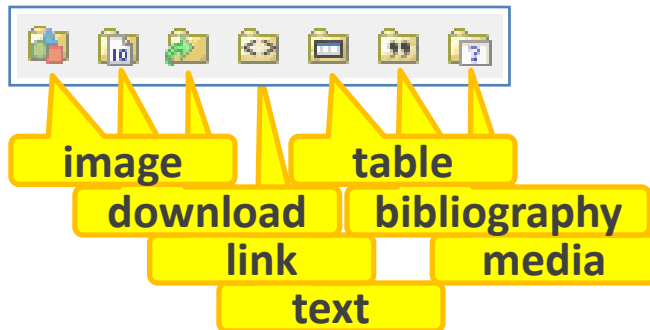


- Format boxes

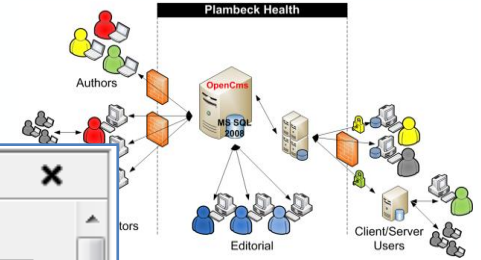
In Kürze

Die meisten Bandscheibenvorfälle sind durch Abnutzungserscheinungen (Degenerationsprozesse) verursacht; sie treten überwiegend zwischen dem 30.-45. Lebensjahr auf. Der Faserring (Anulus fibrosus) der Bandscheibe reißt und der weiche Gallertkern (Nucleus pulposus) tritt in den Rückenmarkskanal und komprimiert das Rückenmark und seine Nerven. Am häufigsten betroffen ist die Lendenwirbelsäule, dann folgt die Halswirbelsäule; in der Brustwirbelsäule kommt es nur in Ausnahmefällen zu einem Bandscheibenschaden.

- Predefined objects managed in galleries



Metadata



Language English [-] X

Details

Title:

Category: Artikel Human

Target audience:

Genus:

Body part:

Last Modified: 12.06.2009 von Martin Abel (Martin.Abel)


Last verified: 12.06.2009 09:36 by Martin Abel (Martin.Abel)


Obsolete:

Responsible Person:


Update:


Synonyms:


synonym [1]: 

synonym [2]: 

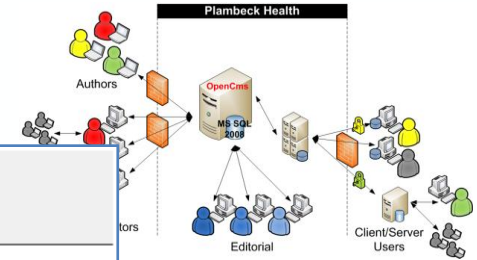
Keywords:

Keyword [1]: 

Keyword [2]: 

Keyword [3]: 

Metadata



ICD-10:

| Chapter | Block |
|--|---|
| VII: Krankheiten des Auges und der Augenanhangsgebilde | M00-M25: Arthropathien |
| VIII: Krankheiten des Ohres und des Warzenfortsatzes | M00-M03: Infektiöse Arthropathien |
| IX: Krankheiten des Kreislaufsystems | M05-M14: Entzündliche Polyarthropathien |
| X: Krankheiten des Atmungssystems | M15-M19: Arthrose |
| XI: Krankheiten des Verdauungssystems | M20-M25: Sonstige Gelenkkrankheiten |
| XII: Krankheiten der Haut und der Unterhaut | M30-M36: Systemkrankheiten des Bindegewebes |
| XIII: Krankheiten des Muskel-Skelett-Systems und des Bindegewebes | M40-M54: Krankheiten der Wirbelsäule und des Rückens |

| Category | Subcategory |
|--|---|
| M45: Spondylitis ankylosans | - |
| M46: Sonstige entzündliche Spondylopathien | M51.0: Lumbale und sonstige Bandscheibenschäden |
| M47: Spondylose | M51.1: Lumbale und sonstige Bandscheibenschäden |
| M48: Sonstige Spondylopathien | M51.2: Sonstige näher bezeichnete Bandscheibenschäden |
| M49: Spondylopathien bei anderenorts klassifizierten Krankheiten | M51.3: Sonstige näher bezeichnete Bandscheibenschäden |
| M50: Zervikale Bandscheibenschäden | M51.4: Schmorl-Knötchen |
| M51: Sonstige Bandscheibenschäden | M51.8: Sonstige näher bezeichnete Bandscheibenschäden |

Selection

M50: Zervikale Bandscheibenschäden
M51: Sonstige Bandscheibenschäden

| Analysis: | | | | | | |
|-------------------------------------|------------|-------------|--------------|----------|----------|----------|
| | Paragraphs | Words | Characters | Filters | Images | Tables |
| Zusammenfassung | 1 | 142 | 1287 | 0 | 0 | 0 |
| Beschreibung der Krankheit | 46 | 1538 | 11965 | 0 | 5 | 5 |
| Ursachen | 11 | 460 | 3545 | 0 | 0 | 0 |
| Symptome | 15 | 759 | 5734 | 0 | 0 | 0 |
| Komplikationen | 9 | 401 | 3117 | 0 | 1 | 1 |
| Untersuchungen zur Diagnosestellung | 11 | 557 | 4258 | 0 | 1 | 1 |
| Heilmethoden/Therapien | 40 | 1394 | 11226 | 0 | 1 | 1 |
| Prognose | 3 | 212 | 1783 | 0 | 0 | 0 |
| Vorbeugung/Prävention | 9 | 86 | 774 | 0 | 0 | 0 |
| Praktische Tipps | 1 | 75 | 631 | 0 | 0 | 0 |
| Aktuelles | 6 | 107 | 1040 | 0 | 0 | 0 |
| Artikel | 152 | 5731 | 45360 | 0 | 8 | 8 |

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Plambeck Health

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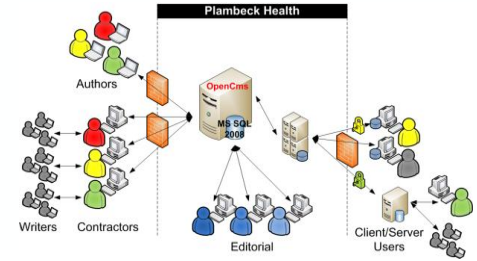
Workflows

- Document setup
- Request/Response
- Obsolete Document

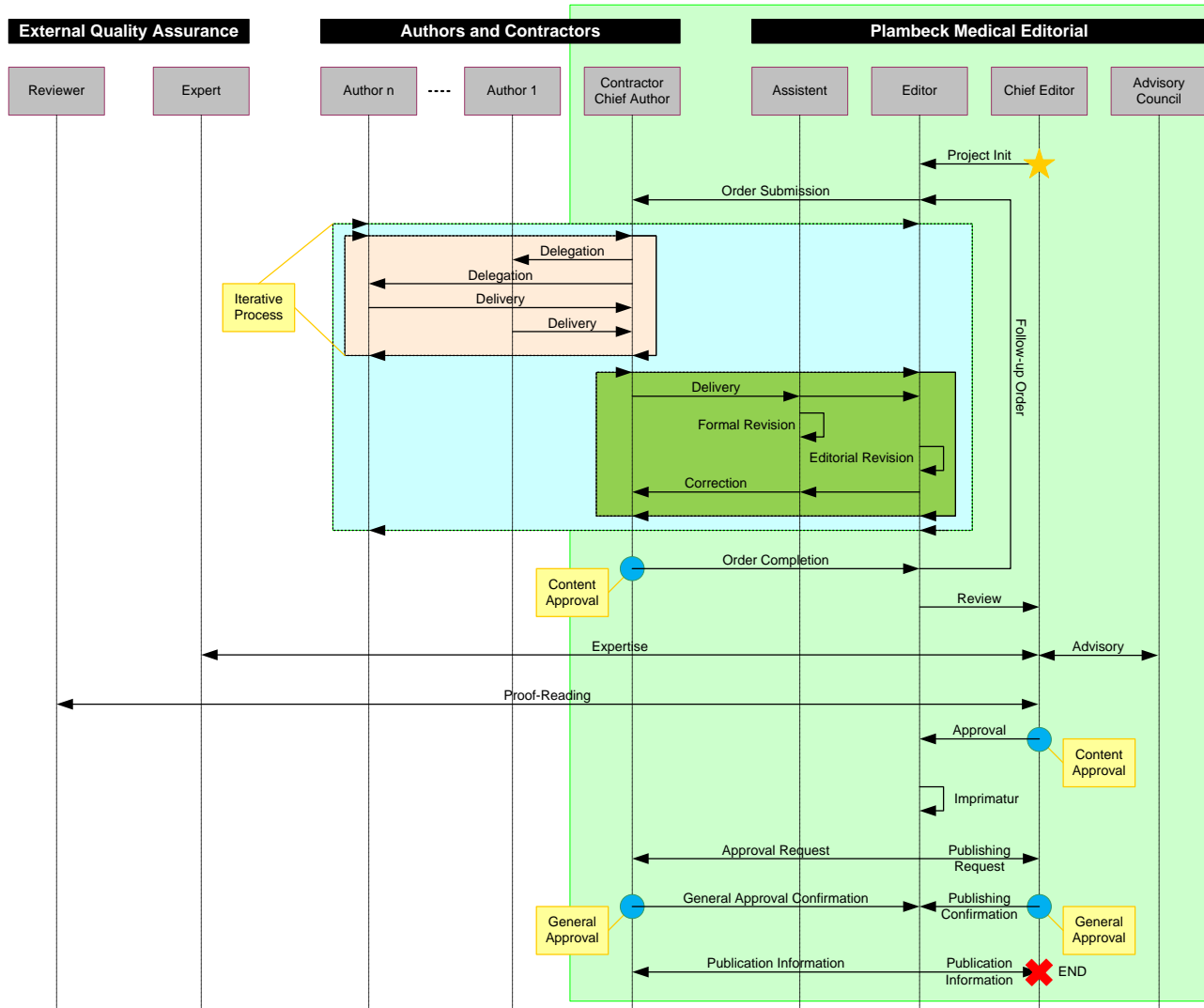
Questions

Workflows

- Steering standardized processes
 - Document setup
 - Document release management
 - Document closing
- Process documentation
 - Assign & track tasks
 - Context related messaging and callbacks
- Quality Assurance
 - Triggers and reminders
 - Mail notify
- Document history
 - Versioning (audit reports)
 - Recover (user/author callbacks)



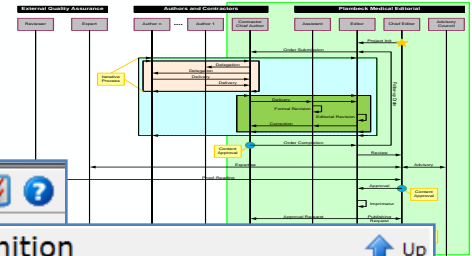
Workflows



Document
setup
workflow
(simplified)

Workflows - Setup

Chief editor: Martin Abel



Project Offline - root organiza Site /sites/default/ View Workflow

Workflow view > Workflow templates

Workflow templates

Actions

Upload workflow

Installed workflows

Installed workflows (4)

| I | U | Title | |
|---|---|--------------------------------------|------------------------|
| | | Artikel anlegen/bearbeiten/freigeben | freigabeworkflow |
| | | Freigabe_Sub_Liefern/Schreiben | liefern_schreiben 1 |
| | | Block Überwachung | supervisionWorkflow 1 |
| | | Veraltete Artikel | veralterungsWorkflow 1 |

Instantiate workflow definition

Identification

Template: Artikel anlegen/bearbeiten/freigeben

Instance title: Update article: herniated vertebral disc (slipped disc)

Variables

Textredakteur: Rolf.Lange

Bildredakteur: Martin.Abel

Artikel: /Artikel/Bandscheibenvorfall/

Ok Cancel

Assigned person notified by eMail

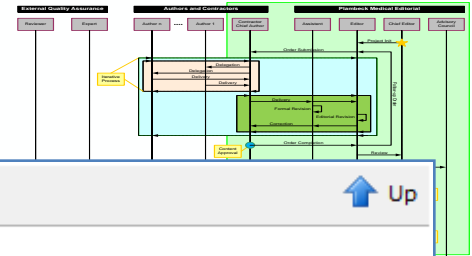
Open tasks

Instances (3)

| S | Instance | Workflow definition | Start date ^A | State | A |
|---|--|--------------------------------------|-------------------------|---------------------|---|
| | Update article: herniated vertebral disc (slipped disc) | Artikel anlegen/bearbeiten/freigeben | 6/13/09 | Running | |
| | Artikel 'Bandscheibenvorfall' veraltet. Link2Bandscheibenvorfall Veraltete Artikel | Artikel anlegen/bearbeiten/freigeben | 6/11/09 | Completed (6/11/09) | |
| | herniated vertebral disc | Artikel anlegen/bearbeiten/freigeben | 6/11/09 | Running | |

Workflows - Step

Text editor: Rolf Lange



Open tasks Up

Instances
Instances (1) Print

Search

| S | Instance | Workflow definition | Start date | State | A |
|---|---|--------------------------------------|------------|---------|---|
| | Update article: herniated vertebral disc (slipped disc) | Artikel anlegen/bearbeiten/freigeben | 6/13/09 | Running | |

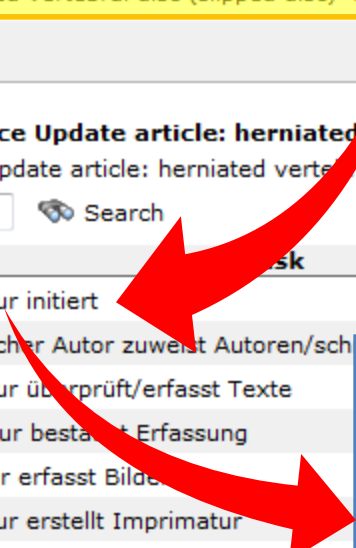
Assigned person notified by eMail

State of tasks Up

Tasks of the instance Update article: herniated vertebral disc (slipped disc)
Tasks of the instance Update article: herniated vertebral disc (slipped disc) (9) Comments Print

Search

| State | Task | Completed | R |
|---------|---|-----------|---|
| Running | Textredakteur initiiert | | |
| Open | Verantwortlicher Autor zuweist Autoren/sch | | |
| Open | Textredakteur überprüft/erfasst Texte | | |
| Open | Chefredakteur bestätigt Erfassung | | |
| Open | Bildredakteur erfasst Bilder | | |
| Open | Textredakteur erstellt Imprimatur | | |
| Open | Verantwortlicher Autor bestätigt Imprimatur | | |
| Open | Chefredakteur bestätigt Imprimatur | | |
| Open | Chefredakteur wiederholt Publizierung | | |



Complete Workflow Task

Variables

Beschreibung: Bitte wählen Sie einen Verantwortlichen Autor für den Artikel

Artikel: /Artikel/Bandscheibenvorfall/

Verantwortlicher Autor:

Additional comments

Comments: Martin, please update your article herniated vertebral disc (slipped disc) from last year as agreed last week.
Thanks, Rolf

Group ATT-Chefredakteur User Select

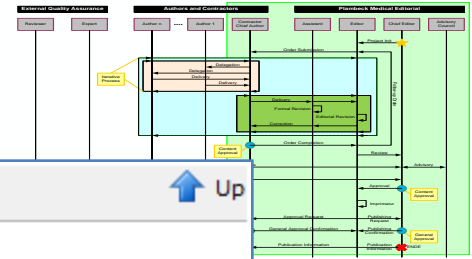
Users (10) Search

Login

- IKUTS/Silke.Heimes
- Martin.Abel
- Redaktion-Brummerloh/Dorothea.Brummerloh
- Redaktion-Lauff/Sigrid.Lauff
- Redaktion-Sonntag/Levke.Sonntag
- Redaktion-Voos/Dunja.Voos
- Redaktion-Waldhaus/Werner.Waldhaus
- Reuter-Medical/Peter.Reuter

Workflows - Request

Text editor: Rolf Lange



State of tasks

Tasks of the instance Update article: herniated vertebral disc (slipped disc)

Tasks of the instance Update article: herniated vertebral disc (slipped disc) (9)

Comments Print

Search

| State | Task | Completed | R |
|-----------|---|---|---|
| Completed | Textredakteur initiiert | 6/14/09 | |
| Running | Verantwortlicher Autor zuweist Autoren/schreibt den Artikel | Waiting for Martin Abel (Martin.Abel) from root organizational unit | |
| Open | Textredakteur überprüft/erfasst Texte | | |
| Open | Chefredakteur bestätigt Erfassung | | |
| Open | Bildredakteur erfasst Bilder | | |
| Open | Textredakteur erstellt Imprimatur | | |
| Open | Verantwortlicher Autor bestätigt Imprimatur | | |
| Open | Chefredakteur bestätigt Imprimatur | | |

Requests

Requests



Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)'

Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)'

Search

| Date | From | To | Text |
|-----------------------------|------|----|------|
| No entries have been found. | | | |

New request

From: Rolf.Lange

To:

text: OK, done! But what about the new ICD-10 codes? Should I really use them, already?
Rolf

Requested person notified by eMail

Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)'

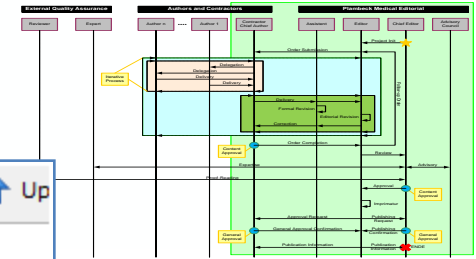
Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)'

Search

| Date | From | To | Request: | D A |
|-----------------|------------|-------------|---|-----|
| 6/14/09 1:20 PM | Rolf.Lange | Martin.Abel | Request: OK, done! But what about the new ICD-10 codes? Should I really use them, already? Rolf | |

Workflows - Response

Contractor: Martin Abel



State of tasks

Tasks of the instance Update article: herniated vertebral disc (slipped disc)

Tasks of the instance Update article: herniated vertebral disc (slipped disc) (9) Comments Print

Search

| State | Task | Completed | R |
|-----------|---|-----------|---|
| Completed | Textredakteur initiiert | 6/14/09 | |
| Running | Verantwortlicher Autor zuweist Autoren/schreibt den Artikel | | |
| Open | Textredakteur überprüft/erfasst Texte | | |
| Open | Chefredakteur bestätigt Erfassung | | |
| Open | Bildredakteur erfasst Bilder | | |
| Open | Textredakteur erstellt Imprimatur | | |

Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)'

Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)' (1) Print

Search

| Date | From | To | Text | D | A |
|--------------------|------------|-------------|---|---|---|
| 6/14/09 1:20 PM | Rolf.Lange | Martin.Abel | Request: OK, done! But what about the new ICD-10 codes? Should I really use them, already? Rolf | | |

Answer workflow task request

From: Rolf.Lange

To: Martin.Abel

Request text: OK, done! But what about the new ICD-10 codes? Should I really use them, already? Rolf

text:

Ok

Anything documented in process context!

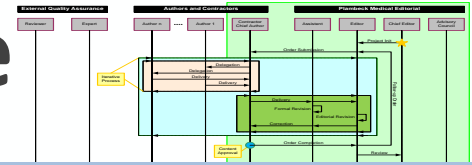
Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)'

Requests for task 'Verantwortlicher Autor zuweist Autoren/schreibt den Artikel' in Process 'Update article: herniated vertebral disc (slipped disc)' (2) Print

Search

| Date | From | To | Text | D | A |
|--------------------|-------------|-------------|---|---|---|
| 6/14/09 1:20 PM | Rolf.Lange | Martin.Abel | Request: OK, done! But what about the new ICD-10 codes? Should I really use them, already? Rolf | | |
| 6/14/09 1:34 PM | Martin.Abel | Rolf.Lange | Answer: Hi Rolf, yes, please use the new ICD-10 codes. Thanks, Martin | | |

Workflows – Obsolete Article

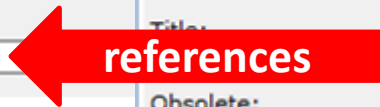


Details

Title: herniated vertebral disk

Obsolete:

Responsible Person:



Details

Title: Hairs

Obsolete:

Responsible Person:

Responsible Person:

Responsible Person:

All persons responsible for an article referencing the obsolete article will be requested to update their links!

Open tasks

Instances

Instances (1)

| S | Instance | Workflow definition | Start date | State | A |
|---|---|---------------------|------------|---------|---|
| | Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL | Veraltete Artikel | 6/14/09 | Running | |

Tasks of the instance Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL

Tasks of the instance Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL (1)

| State | Task | Completed |
|---------|----------------------------------|-----------|
| Running | Article responsible was notified | |

State of tasks

Tasks of the instance Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL

Tasks of the instance Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL (1)

| State | Task | Completed |
|-----------|----------------------------------|-----------|
| Completed | Article responsible was notified | |

Assign task Set node Take transition

Tasks of the instance Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL

Tasks of the instance Artikel 'Bandscheibenvorfall' veraltet. BeispielGHL (1)

| State | Task | Completed |
|-----------|----------------------------------|-----------|
| Completed | Article responsible was notified | |

Complete Workflow Task

Variables

Beschreibung: Artikel wurde als veraltet gekennzeichnet

article: /Test/Plambeck/BeispielGHL/

referencedArticle: /Artikel/Bandscheibenvorfall/

Additional comments

comments: OK, I updated my links. Thanks, Rolf

Agenda

Plambeck Health

Requirements for Document Management

An OpenCms Solution

- Organizational Units
- XML Documents
- Editor
- Format Policy
- Metadata

Workflows

- Document setup
- Request/Response
- Obsolete Document

Questions

Questions

