

OpenIMS® Open Information Management Server

OpenIMS®

Fast, Easy to use and
On-demand
A Content Platform from the
21st Century



Business Process Management Server
Whitepaper

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1 INTRODUCTION

OpenIMS® Business Process Management (hereafter BPMS) is a flexible platform for making, making available and dealing with electronic forms and database oriented data, both with the assistance of a web browser. It is extremely suitable for moving existing paper forms and underlying business processes to the web. Besides that it is also possible to develop various data processing applications based on web forms. Now employees can get fast and simple access to all necessary company documentation from every location in- or even outside your organisation.

OpenIMS® BPMS has the following key benefits:

- User friendly;
- Accessible via a web browser;
- Integration with your intranet/web site/portal;
- Web based forms; to support the business process where per process/workflow stage information can be added and decisions can be made;
- Simple to make adjustments;
- Personal to do list;
- Quick development of web applications based on business processes and relational data;
- Extensive version management (a log per form);
- Process/workflow management including reminder and e-mail notification;
- Extensive user authorisation facilities;
- Various facilities to create links with other company systems;
- Information storage in XML format (retrieve and save information in XML format);
- Extensive facilities for developing reports;
- Audit trails;
- Links with other OpenIMS® products such as Document and Content Management.

OpenIMS® has as goal to help a user to perform his/her daily activities faster, more efficient and better quality wise.

Changeability

Because business processes are very changeable, there is a high demand on flexibility with realising and integrating software applications. OpenIMS® BPMS is the ideal way to realise that flexibility. OpenIMS® BPMS provides you with the opportunity to adapt functionality to, for example, changed requirements.

Advantages

- Increasing productivity;
- Shorten decision making processes, from days to minutes;
- Making all running processes well organised;
- Simple adding of new processes;
- Saving on HR costs by introducing electronic forms;
- Makes integration of complex processes possible.

Quality

OpenIMS® ensures that the business processes are executed in a structured and standardised way. This enables the improvement of quality (ISO, HKZ< INK support), traceability and speed.

The OpenIMS® platform

OpenIMS® is a platform that has several underlying server products available which are all created based on the same philosophy. The products can work separately from each other but cooperate efficiently together when integrated. The server products support e-mail archiving, content management and document management. This means you can move information via a form to a document to generate, for example, automatically a letter of confirmation and send it.

The last chapter of this white paper will show some practical examples.

2 WHY A BUSINESS PROCESS MANAGEMENT SERVER

OpenIMS® enables your organisation to give automated support to business processes; think about the order process or dealing with a request for information that was received through the internet, up to handing over the final offer to that specific prospect.

But OpenIMS® BPMS can also be used for registration of complaints, requests for leave, sick reports, permit applications (e-box with progress check), et cetera.

OpenIMS® BPMS is a flexible platform for making vertical branch specific web applications. For this purpose OpenIMS® BPMS offers a set of tools to help you develop applications and make these accessible through a web interface.

The BPMS environment is characterised by its flexibility which enables you to respond quickly to changes in the marketplace, your organisation, certifying organisations or the government.

OpenIMS® BPMS is very suitable for:

- **Working structured, efficient and more effective.** One of the most important reasons for using OpenIMS® BPMS is the increase in efficiency rate of the organisation in relation to the processing of information.
- **Workflow / Process management.** Register and manage business processes by using form flows. Think about requests for leave, or study facilities where an employee fills out a web form, the department manager approves the request and, eventually, the Human Recourses Department deals with the request.
- **Data management.** Within BPMS you are able to manage all data that is accumulated within a process. The information can, for example, consist of NAW data. Next to editing records, it is also possible to develop complete applications. Think about applications for customer information (CRM), product information (PDM), EPD's, et cetera.
- **Traceability.** Per process it is registered who made which choice, which makes it possible to gain insight afterwards into the steps that were made.

The next chapters will address all OpenIMS® BPMS key functions.

3 THE PROCESS MANAGEMENT ENVIRONMENT

The OpenIMS® structure is set up simple and user friendly. All complex actions are performed in the background.

3.1 Forms

OpenIMS® uses web forms for entering and registering data. The web forms may differ per decision (process step) and per user group. Certain information may not be visible or some elements on the form may not be edited.

The forms can be made available as part of an intranet or website.

A form can contain all sorts of information that is written in XML. The considerable advantage of this system is that the underlying structure doesn't need to be adjusted when new fields are added to the form.

OpenIMS® arranges this automatically.

The fields are specified at a central level. You can choose from various field types such as: text, multiple choice, radio button, list box, date, time, database link and many other types.

For each field validations can be defined with the possibility to make it compulsory to fill it in.

The screenshot shows a web browser window displaying a complaint form. The browser's address bar shows a URL starting with 'http://demo.osict.com/'. The page title is 'Klachten'. The form is titled 'Klachten' and 'Klachtenformulier'. It contains several input fields: 'e-mailadres', 'Naam : *', 'Telefoon : ^', 'Mijn klacht gaat over :', and 'Mijn klacht :'. There are also buttons for 'Aanleveren' and 'Wissen'. The footer of the page reads '© 2005 OpenSesame ICT BV - Powered by OpenIMS'.

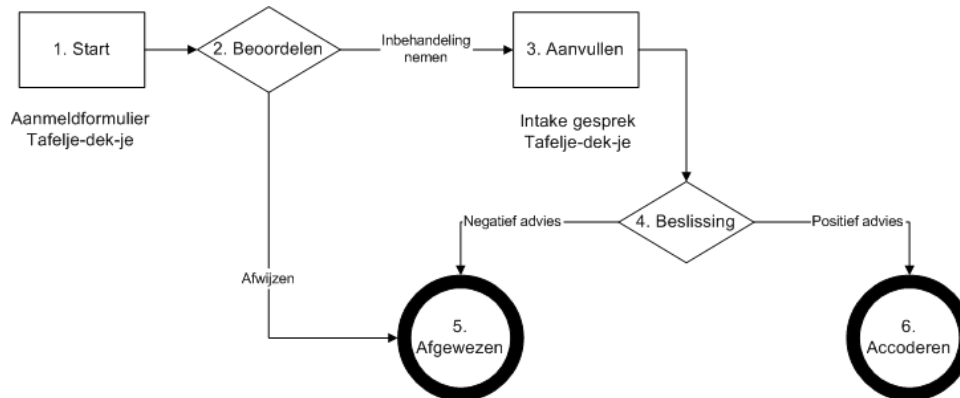
The screenshot shows a web browser window displaying a form titled 'Intake gesprek Tafeltje-dek-je'. The form is for a 'Lekkere maaltijden van de Chef-kok van Adhesie'. It contains several input fields: 'Mijn naam is:' (filled with 'Theo Boersma'), 'Ergensweg 123' (adres), 'Amsterdam' (woonplaats), and '030-5652722' (telefoonnummer). There is also a section for 'In te vullen door medewerker Adhesie na telefonisch contact.' with fields for 'Leeftijd client:' (filled with '8 mrt 2005'), 'Contactpersoon names client:', 'Reden van aanvraag:', 'Advies medewerker Adhesie' (dropdown menu with 'Positief advies' selected), and a 'Verwerking versturen' button. The browser's status bar shows 'Done' and 'Trusted sites'.

3.2 Processes

The process definition in BPMS defines the way forms are guided through the organisation. Using a special process editor the form flow can be defined. Next to the number of process stages it is possible to make a different form per stage available.

Example request for home meals:

The process starts after a visitor of the specific webpage has filled in a request form. The visitor fills in the basic data and the form appears in the first process stage. From here an employee must determine if the request will be taken into consideration. If the request is denied it will be the end of the process. If the request is accepted, an employee will have to fill in the next form with information obtained through an intake phone call. The rest of the process runs manually.



An application manager can for every process stage define who (user group) is authorised to make specific choices or may fill in the specific form. For every stage it can be determined how long a form may stay in that stage (reminder).

3.2.1 Process interface

It is easy to model the various processes in BPMS. You can instantly inspect which forms are found in which process stage, see next image. By selecting a form or a decision, you will see which decision or step must be taken next.

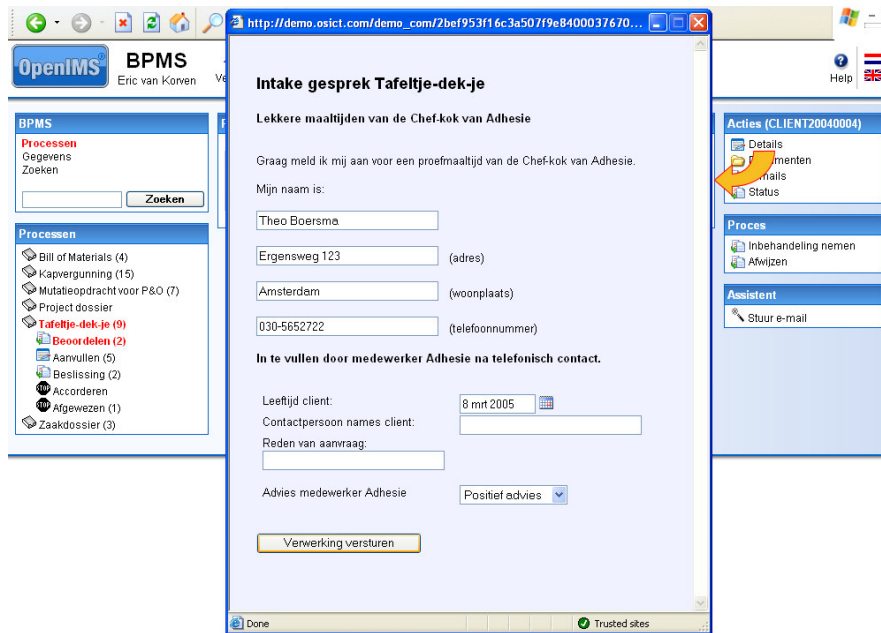
The screenshot shows the OpenIMS BPMS interface. The main content area displays a table of process instances for 'Tafelje-dek-je > Beoordelen'.

ID	Naam	Telefoonnummer	Laatst gewijzigd	Toegewezen
CLIENT20040004	Theo Boersma	030-5652722	Di, 8 Mrt 2005 09:30	
CLIENT20040005	Nico de Vries	030-6522154	Di, 8 Mrt 2005 09:30	

On the right side, there are sections for 'Acties (CLIENT20040004)' with links for 'Details', 'Documenten', 'E-mails', and 'Status'. Below that is a 'Proces' section with 'Inbehandeling nemen' and 'Afwijzen' buttons. At the bottom right is an 'Assistent' section with a 'Stuur e-mail' button.

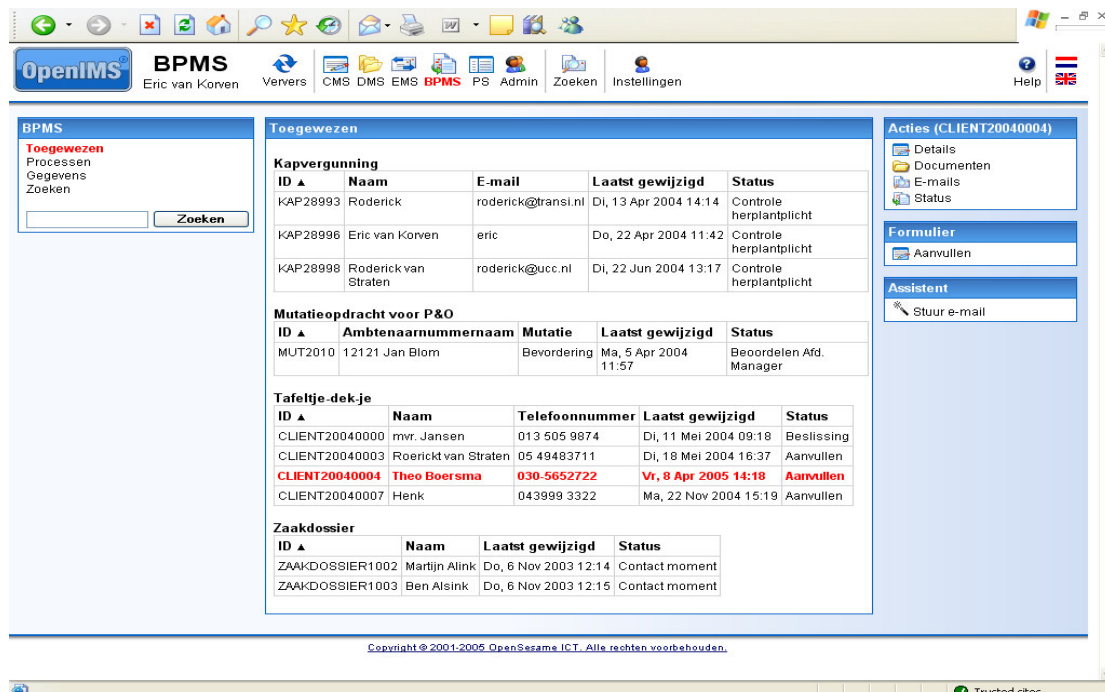
The interface adjusts itself dynamically to the selected process including the possible available further steps. The standard interface only shows the processes that you, as a user, have a right to view/access; other processes that are not relevant to you will not be visible.

With using the function “Details” or when a form is defined in a specific process stage, you are able to view and or access the underlying data. Of course this is only possible when you are authorised, see next image.



3.2.2 Assigned overview

Within BPMS you have your own overview with all forms that are assigned to you, see next image. This overview shows you which forms you must deal with for each process. After you have dealt with the form they disappear from your personal assigned overview. Because of this task driven interface you can deal with all assigned forms quick and efficiently.



In BPMS you are able to maintain various processes, for example:

1. Dealing with complaints;
2. Requesting and dealing with permits;
3. Reporting incidents (ICT helpdesk);
4. Project registration;
5. Dealing with online requests for information;
6. Supporting HR department with requests for study facilities;
7. Supporting HR department with monitoring sick reports.

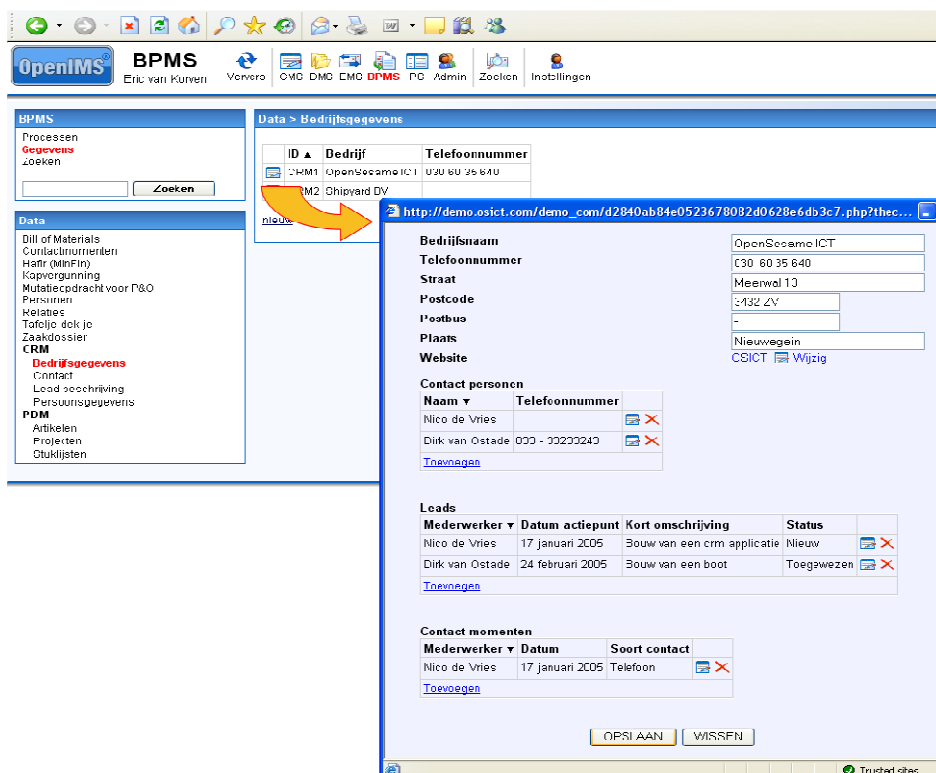
3.3 Applications

Besides an environment that electronically supports processes and forms, it is also possible to develop (web) applications that focus on editing and presenting data. For editing the information web forms are used with support from master detail screens.

This way the organisation is able to quickly and simply develop flexible applications and make them available. In case a web form is changed and published, it is directly available for all users of the application. For each database it can be defined which user groups may view and edit the information.

The environment enables you to make various web applications available. Besides managing basic data (index) advanced applications can also be developed. The image shows a simple CRM application for managing customer information. However it can also be used for:

- Product information;
- Client information;
- Information on personnel;
- Project administration;
- Facility administration;
- Helpdesk application.



3.4 Reports

Within BPMS a report environment is available. With it reports can be developed per process or covering more than one process. For example:

- Average duration (e.g. dealing with complaints);
- The number of complaints per year;
- The number of complaints that are not dealt with in the set time;
- The number of complaints per subsidiary;
- The number of calls at a helpdesk.

Reports can be presented in various formats, such as XML, HTML, PDF or Microsoft Word.

Filter	
Begindatum:	Za, 1 Jan 2005 Einddatum: Wo, 9 Mrt 2005
Procedurecode en naam:	

Aantal gevonden: 5

Documentnaam: **Klanttevredenheidsonderzoek 016 (Klanttevredenheidsonderzoek 016)**
 Status: **geen**
 Volgnummer: **016**
 Begindatum: **4 februari 2005**
 Einddatum: **31 december 2020**
 Plandatum: **31 december 2020**
 Inhoud:
 Motivatie:
 Verbetervoorstellen:
 Afwijkingen:

Documentnaam: **KT006 (KT006)**
 Status: **uitgevoerd**
 Volgnummer: **006**
 Begindatum: **19 januari 2005**
 Einddatum: **3 februari 2005**
 Plandatum: **31 december 2020**
 Inhoud:

3.5 Integration with other OpenIMS® products

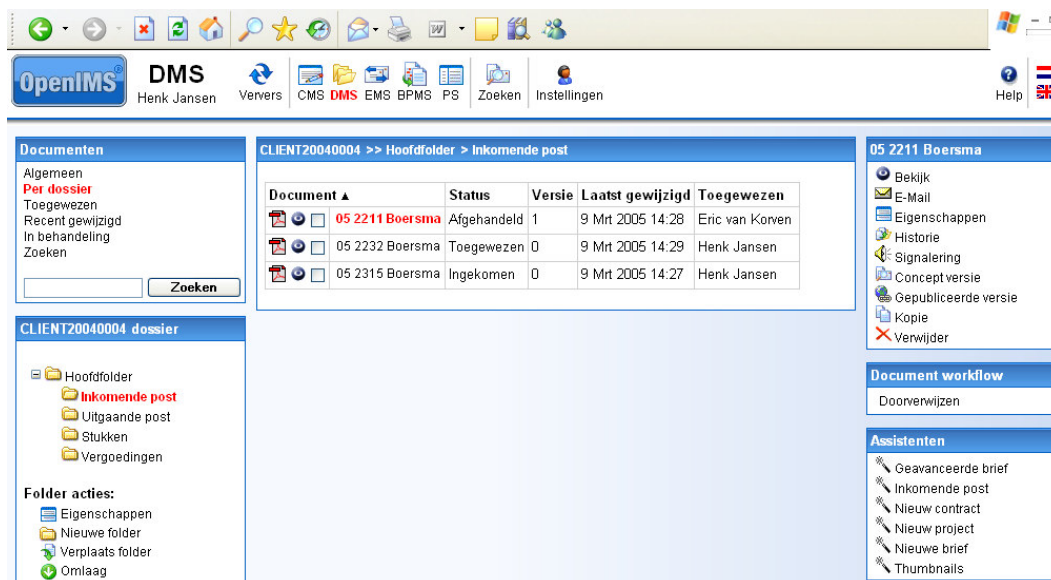
3.5.1 File / Case management

From BPMS you can create a file in OpenIMS® DMS (create file) to register and manage all correspondence and documentation.

Processen > Tafelje-dek-je > Beoordelen					Acties (CLIENT20040004)
ID ▲	Naam	Telefoonnummer	Laatst gewijzigd	Toegewezen	<ul style="list-style-type: none"> Details Maak dossier E-mails Verwijder Status
CLIENT20040004	Theo Boersma	030-5652722	Di, 8 Mrt 2005 09:30		
CLIENT20040005	Nico de Vries	030-6522154	Di, 8 Mrt 2005 09:30		

It is also possible to, for example, generate documents from BPMS using a wizard based on the information that is gathered during the process. An example is a letter of confirmation.

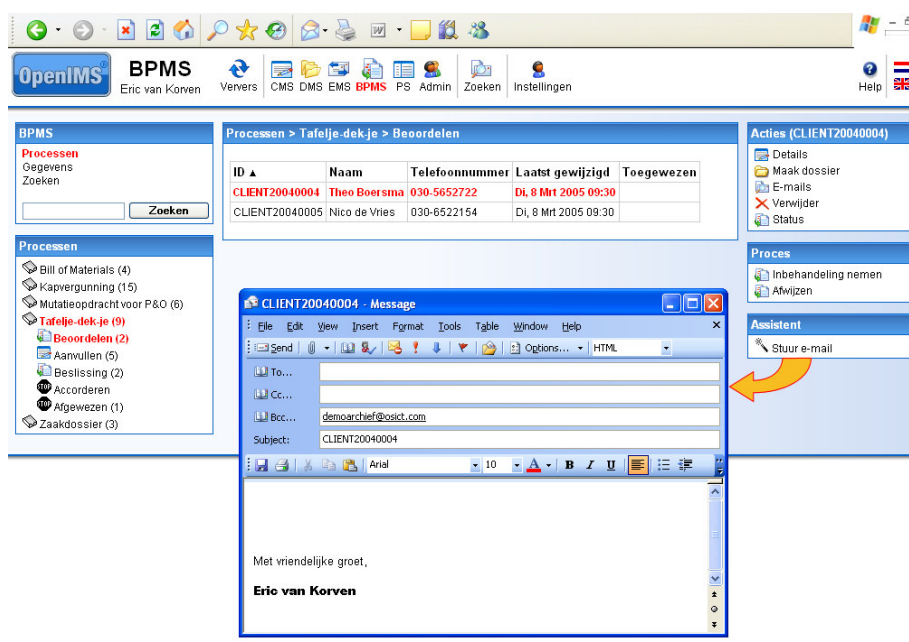




In the document management system you can, together with your colleagues, work on documents, register invoices, deal with mail, et cetera. Check the white paper OpenIMS® Document Management Server for more information.

3.5.2 E-mail correspondence

More and more e-mail will be used for communication between your company and your customers. Therefore you would want to register this flow of information in the process. By working with unique (reference) numbers you can communicate using these numbers and secure the mutual link. These numbers can be generated by the system and used in letters and e-mails.



The e-mail messages you send are subsequently registered in OpenIMS® EMS. This is an e-mail archive where you can save all e-mails including attachments. The e-mails will be indexed so you will be able to retrieve them quick and efficiently by using the search engine. Choose for option "E-mails" in the "Action" menu, fill in the reference number and all e-mails related to this number will be retrieved.

3.5.3 Content management (internet / intranet)

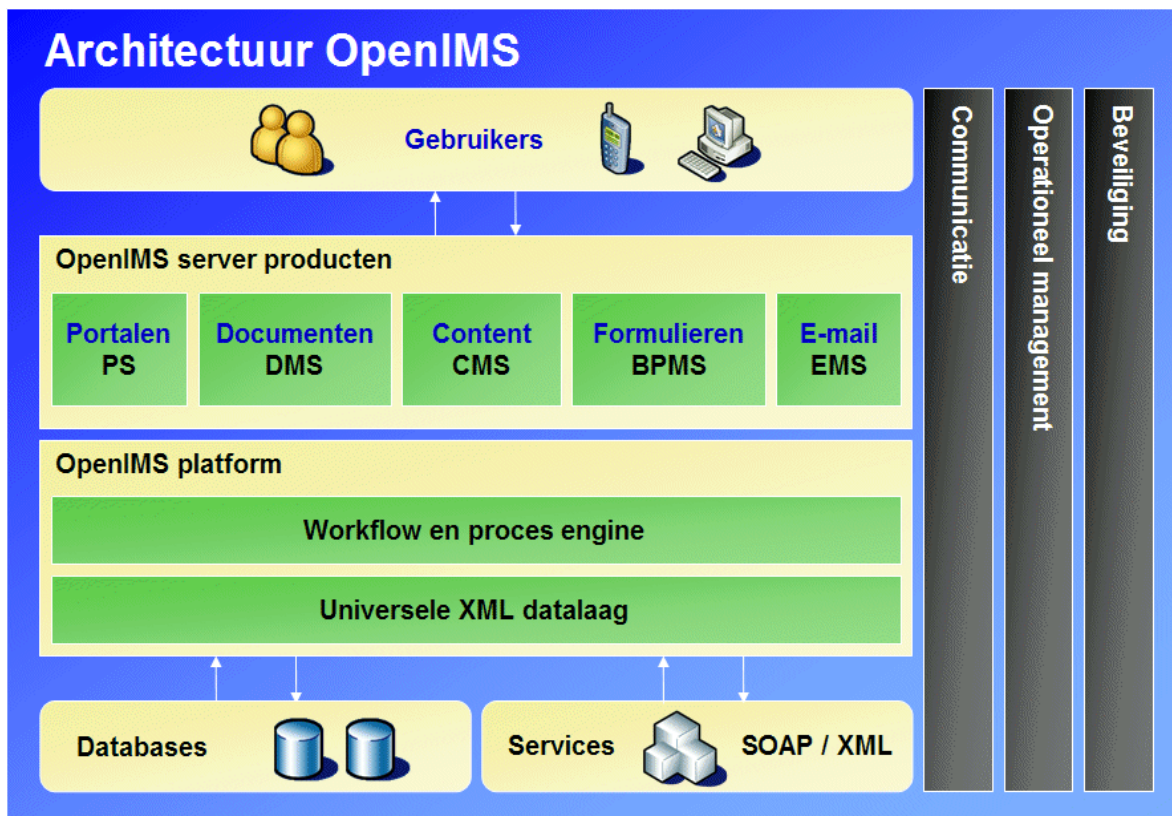
A website may exist of a series of web pages that you can maintain with the OpenIMS® Content management Server. But when structured (relational) information has to be entered and made available in a standardised way, BPMS offers a solution. Think about product information (catalogue), photos, et cetera.

3.5.4 Integration with other applications (Enterprise Application Integration)

OpenIMS® is a powerful platform that can communicate with other systems based on open standards. This means that information from other systems can be stored and retrieved, such as:

- Information on personnel from Beaufort;
- Client information from IJ, Care4;
- Project numbers from Baan;
- Article numbers from SAP;
- Order / entry number from Exact;
- Database information from SQL, Oracle, et cetera.

The BPMS can also be used as an interface between the user and your back office applications. This way you can, for example, offer a standardised web based user interface for all the applications that you want to make available through a web interface.



Through the "Universal XML datasheet" underlying back office systems can be accessed, these can either be a relational database or a mainframe environment that can be accessed through a SOAP interface. OpenIMS® has the necessary facilities available and supports the most common company standards such as XML, SOAP, RSS and ODBC.

Check the white paper Technology for more information on the options to integrate with other systems.

4 APPLICATION EXAMPLES

4.1 Product data management (PDM)

With the product data management you are able to centrally maintain and manage product data.

Therefore you and your colleagues will always have the most recent version of the product information available. Besides data you can also manage, for example, accompanying product pamphlets within the OpenIMS® platform.

The BPMS can be used for managing product information. Through a web browser an authorised employee can view and possibly change product information from every location within your company.

This can be a simple Bill of Materials or perhaps the complete specification of a digital camera, as the example shows.

In the example you see a BPMS form for maintaining the digital product information and you see the reproduction on the website (CMS)

Besides the general product specification, various images of the product can also be included.

The image below shows the product information from BPMS presented on the website. Changes in the BPMS lead directly to changes on the website.

http://www.fuji.nl/fujifilm_com/375df34a8dda1ec07c3cef1078f4a47f.php?thecase=378a28a...

Video systeem uit: Pa/NTSC omschakelbaar

Voeding: 2 x AA Alkaline batterij [Kies](#)

Aantal opnamen per batterij / accu lading: [Bekijk](#) [Wijzig](#)

Afmeting B: 101,5

Afmeting H: 50,8

Afmeting D: 41,5

Gewicht: (gram, exclusief batterij(en) en media) 120

Bijzonderheden voor productvergelijking: [Bekijk](#) [Wijzig](#)

Overige eigenschappen: [Bekijk](#) [Wijzig](#)

Inbegrepen toebehoren: [Bekijk](#) [Wijzig](#)

Optionele toebehoren: [Bekijk](#) [Wijzig](#)

Afbeelding thumbnail: [Bekijk](#) [Wijzig](#)

Afbeelding HighRes HQ: [Bekijk](#) [Wijzig](#)

Afbeelding HighRes LQ: [Bekijk](#) [Wijzig](#)

Afbeelding productvergelijker: [Bekijk](#) [Wijzig](#)

Animatie: [Bekijk](#) [Wijzig](#)

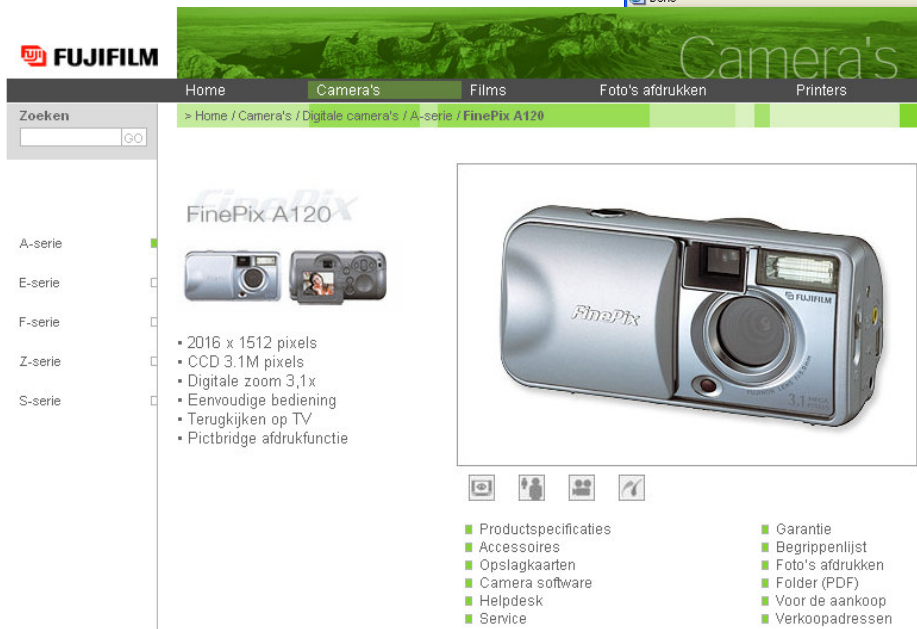
Speciale logo's: [Bekijk](#) [Wijzig](#)

Handleiding: Duits, Engels, Frans, Nederlands [Kies](#)

Garantiebewijs: Nederlands [Kies](#)

Accessoires: [Bekijk](#) [Wijzig](#)

OK Annuleren



4.2 Customer Relations Management (CRM)

In case you are not working with a central database with customer information yet, or you would like to manage customer information which can not be realised in your available system, you could deploy BPMS to manage this information. Think about simple means to support, for example, mail registration or registering leads and minutes.

Such web applications based on OpenIMS® BPMS can be arranged custom made very quickly in cooperation with your company.

Bedrijfsnaam: OpenSesame ICT
Telefoonnummer: 030 60 35 640
Straat: Meerwal 13
Postcode: 3432 ZV
Postbus: -
Plaats: Nieuwegein
Website: OSICT [Wijzig](#)

Contact personen

Naam ▼	Telefoonnummer	
Nico de Vries		
Dirk van Ostade	033 - 33233243	

[Toevoegen](#)

Leads

Mederwerker ▼	Datum actiepunt	Kort omschrijving	Status	
Nico de Vries	17 januari 2005	Bouw van een crm applicatie	Nieuw	
Dirk van Ostade	24 februari 2005	Bouw van een boot	Toegewezen	

[Toevoegen](#)

Contact momenten

Mederwerker ▼	Datum	Soort contact	
Nico de Vries	17 januari 2005	Telefoon	

[Toevoegen](#)

Trusted sites

4.3 File / Case / Project management

Besides the data related to a project or file, BPMS also helps you to gain insight into the stage a file or case is situated.

You can register all project parts in BPMS and by pressing a button you will receive a clear overview.

Next, an example where a number of case files and the various available stages are shown. From such a process you can go directly to the file to view its documents.

The 'Processen' menu is displayed in a blue-bordered box. It lists various process categories with document icons and counts in parentheses:

- Bill of Materials (3)
- Kapvergunning (15)
- Mutatieopdracht voor P&O (6)
- Project dossier**
 - Plan van aanpak**
 - Functioneel ontwerp
 - Technisch ontwerp
 - Bouw
 - Testen
 - Opleiding
 - Acceptatie
 - Onderhoud
- Tafeltje-dek-je (9)
- Zaakdossier (3)

The screenshot shows the OpenIMS BPMS web application interface. At the top is a navigation bar with the 'OpenIMS BPMS' logo and user 'Eric van Korven'. Below this are several menu items: 'Ververs', 'CMS', 'DMS', 'EMS', 'BPMS', 'PS', 'Admin', 'Zoeken', and 'Instellingen'. On the right side of the navigation bar are 'Help' and a language selector (Dutch flag).

The main content area is divided into several sections:

- BPMS**: A sidebar with 'Processen', 'Gegevens', and 'Zoeken'.
- Processen > Zaakdossier > Contact moment**: A central table showing case details.
- Acties (ZAAKDOSSIER1002)**: A sidebar with actions like 'Details', 'Maak dossier', 'E-mails', 'Verwijder', and 'Status'.
- Proces**: A sidebar with 'Contact moment'.
- Assistent**: A sidebar with 'Stuur e-mail'.

The central table contains the following data:

ID ▲	Naam	Laatst gewijzigd	Toegewezen
ZAAKDOSSIER1002	Martijn Alink	Do, 6 Nov 2003 12:14	Eric van Korven
ZAAKDOSSIER1003	Ben Alsink	Do, 6 Nov 2003 12:15	Eric van Korven

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4.4 Electronic Patient Dossier (EPD)

Within the child welfare one is working hard to connect all business processes with each other in order to meet the various requirement enforced by the government (HKZ). This asks for a flexible system to be able to anticipate the changes in the requirements.

The next image shows a form where minutes and treatment plans (DBC's) for a specific client are registered. Based on the information reports can be generated and the current version of the so called care plan can be printed. Within this BPMS application all current data and reports are gathered.

VERSLAGEN

DAGRAPPORAGES:

Datum verslag ▼	Ingevoerd door	Soort dagrapportage	
21 december 2004	Dennis Bouwmeester (OSICT)	Groepsbehandeling	
6 augustus 2004	Naomi van Hoven	Groepsbehandeling	
3 augustus 2004	Naomi van Hoven	Oefengroep	

[Toevoegen](#)

Rapport (PDF)

ONDERWIJS:

Datum verslag ▼	Ingevoerd door	Soort onderwijs

[Toevoegen](#)

WERKAANTEKENINGEN:

Datum verslag ▼	Ingevoerd door	Soort werkaantekening	
24 augustus 2004	Rob Hanegraaf (InPuls)	Kinderarts	

[Toevoegen](#)

MODULEPLANNEN:

Datum verslag ▼	Ingevoerd door	Soort module	
3 maart 2005	Brigitte Bloemenkamp (InPuls)	Speltherapie	
5 augustus 2004	Dennis Bouwmeester (OSICT)	Angstreductietraining	

[Toevoegen](#)

BEHANDELPLANNEN

AANVANG:

Datum vaststelling hulpverleningsplan ▼	Vastgesteld door	Hulpverleningsvariant	Startdatum hulpverleningsvariant	
24 augustus 2004	Arie	Geen idee	24 augustus 2004	
6 augustus 2004		Geen idee	6 augustus 2004	
1 juni 2004	Dokter	Geen idee	2 februari 2004	

[Toevoegen](#)

The BPMS is used successfully at several healthcare institutions shaped as a care module with registration and maintenance facilities for client information, group information, day/week reports, notes, diagnostic image, module plans, education, treatments, treatment plans and evaluations. Based on the information several reports can be generated so employees can, for example, have current treatment plans at their disposal in accordance with the agreements and documents defined by healthcare regulations.

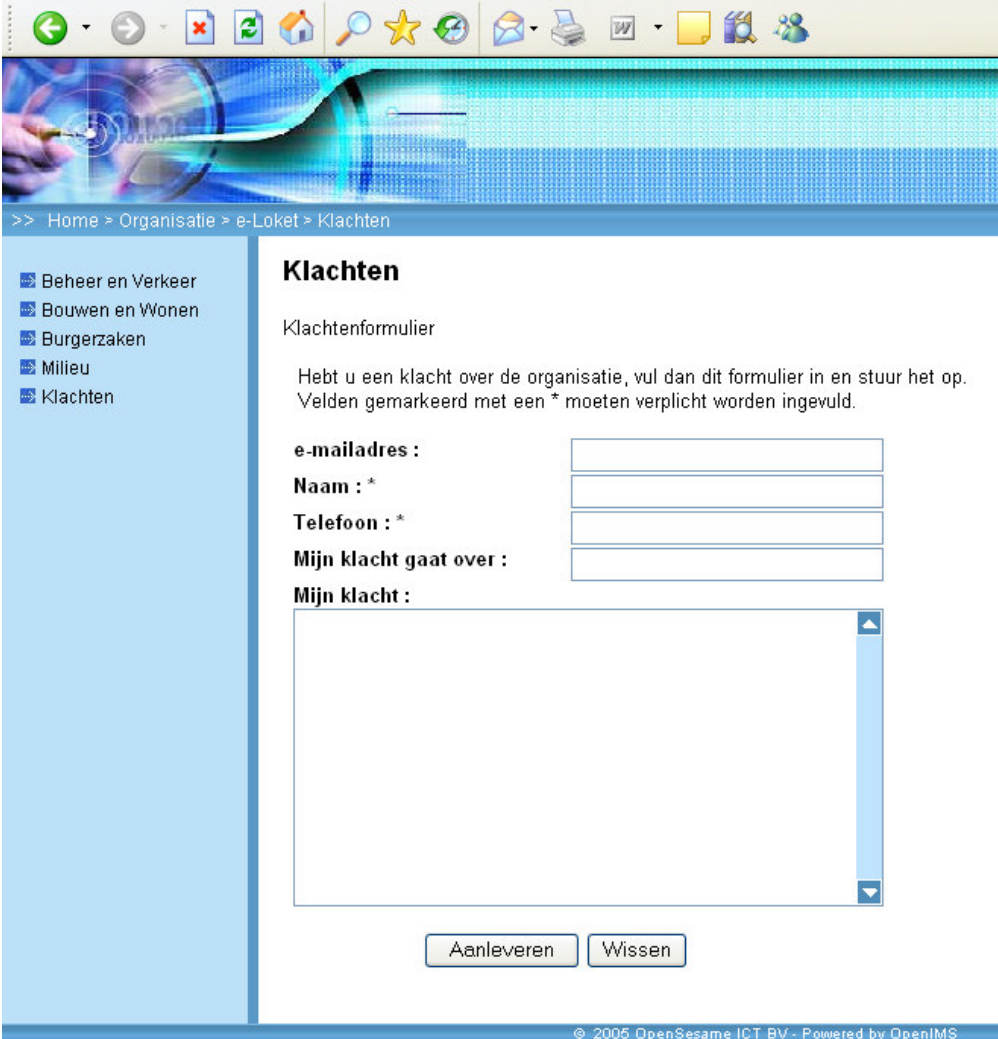
Within this type of application it is also important to have sufficient security at record level implemented so only proper authorised personnel may access the client information.

4.5 E-Forms

An form can be arranged in various ways. A simple way is making forms/documents in PDF format available through a website which can subsequently be downloaded.

A more advanced way is to offer these forms as electronic forms. For example requests for various permits, leave of absence or announcing a complaint.

By using the OpenIMS® you are able to introduce these kinds of functions and will give continuous feedback about the status of the request to the applicant.



The screenshot shows a web browser window with a navigation bar at the top containing icons for back, forward, home, search, and other functions. Below the browser window, the website's breadcrumb navigation reads: >> Home > Organisatie > e-Loket > Klachten.

The main content area is titled **Klachten** and contains the following text: Klachtenformulier. Hebt u een klacht over de organisatie, vul dan dit formulier in en stuur het op. Velden gemarkeerd met een * moeten verplicht worden ingevuld.

The form fields are:

- e-mailadres :
- Naam : *
- Telefoon : *
- Mijn klacht gaat over :
- Mijn klacht :

At the bottom of the form are two buttons: **Aanleveren** and **Wissen**.

The footer of the page contains the text: © 2005 OpenSesame ICT BV - Powered by OpenIMS

4.6 Supporting HR form flows

Within the HR department numerous paper forms and documents (handbooks, protocols) are made, distributed and processed. The processing of such a document normally takes quite some time. By using OpenIMS® these forms and documents can be processed digitally which speeds up the processing. Think about:

- Applying for study facilities;
- Passing on change of address;
- Absenteeism.

The screenshot shows the OpenIMS BPMS interface. The main window displays a process flow for 'Studiefaciliteiten > Adviseren P&O'. A table lists process instances with columns: ID, Naam medewerk(st)er, Aanvraag voor studie, Laatste gewijzigd, and Toegewezen. One instance is selected: ID S1017, Naam medewerk(st)er Bouwmeester, Aanvraag voor studie PHP, Laatste gewijzigd Wo, 6 Apr 2005 10:52, and Toegewezen. An arrow points from the 'Zoeken' button to a search result in a Microsoft Internet Explorer window displaying a 'Formulier (Readonly) aanvraag studiefaciliteiten' form. The form contains the following information:

Naam	: Bouwmeester
Voorletters	: D.V.
Adres	: Meerwal 13
Postcode	: 3432ZV
Woonplaats	: Nieuwegein
Sector / Dienst	: Dienst Administratieve Ondersteuning
Functie	: Developer
E-mailadres	:
Aanvraag voor studie	: PHP

Next to registering data, one also usually works with various correspondence, like letters for confirmation, et cetera. The data that is registered in BPMS can then dynamically be linked to a letter in DMS.

The screenshot shows the OpenIMS DMS interface. The main window displays a document folder 'Ondersteuning > PO&O'. A table lists documents with columns: Document, Status, Versie, Laatste gewijzigd, and Toegewezen. One document is selected: S1000 Goedkeuring aanvraag studiefaciliteiten, Status Nieuw, Versie 0, Laatste gewijzigd 20 Dec 2004 15:21, and Toegewezen Dennis Bouwmeester (OSICT). An arrow points from the 'Zoeken' button to a Microsoft Word document titled 'goedkeuring_aanvraag_studiefaciliteiten.doc'. The document content is a letter from D.V. Bouwmeester to the 'Geachte heer/mevrouw Bouwmeester' regarding a study application.

Deventer, 20 december 2004
Kenmerk:
Betreft: goedkeuring studieverzoek

Geachte heer/mevrouw Bouwmeester,

Hierbij deel ik u mede dat wij u graag in de gelegenheid stellen om deel te nemen aan "aanvraagvoorstudie" op 3 december 2004 te.

Op deze cursus is de 75% regeling studiefaciliteiten van toepassing verklaard. Dit houdt onder meer in dat 75% van de reiskosten (op basis van 2^e klasse openbaar vervoer) zullen worden vergoed. De uren, nodig voor lessen worden voor 50% aangemerkt als werktijd (partitimers naar rato), voor zover

5 CONTACT

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