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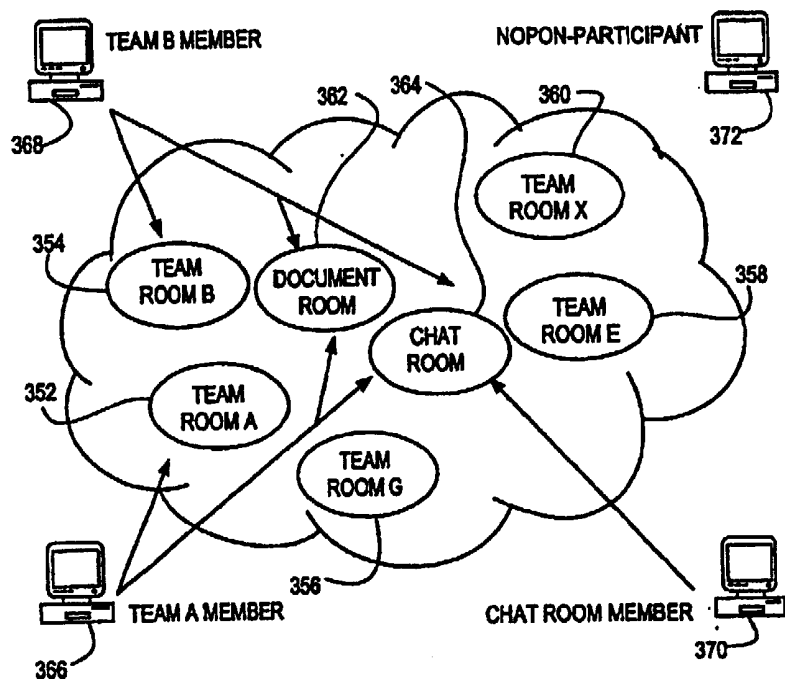
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 (52) UK CL (Edition T )  
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 GB 2313251 A GB 2299000 A  
[www.aln.org/alnweb/magazine/vol2\\_issue2/finkelstein.htm](http://www.aln.org/alnweb/magazine/vol2_issue2/finkelstein.htm)  
[www.loveecstasy.com/about%20us.htm](http://www.loveecstasy.com/about%20us.htm)  
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(54) Abstract Title  
**Communications among team members and non-team members**

(57) Communication is provided between members of two groups. Members of a first group are given privileged access to a first collaboration environment and to a second collaboration environment; members of a second group are given access to only the second collaboration environment. A method 10 is adapted to utilize the Internet as a medium for providing information and data management and sharing between diverse project team members 14, 18. The project team members 14, 18 may be part of diverse functional organizations within one or more larger organizations, may be geographically separated, or may utilize differing information management tools to perform their work activities.

**FIG. 21**



**GB 2 372 401 A**

FIG. 1

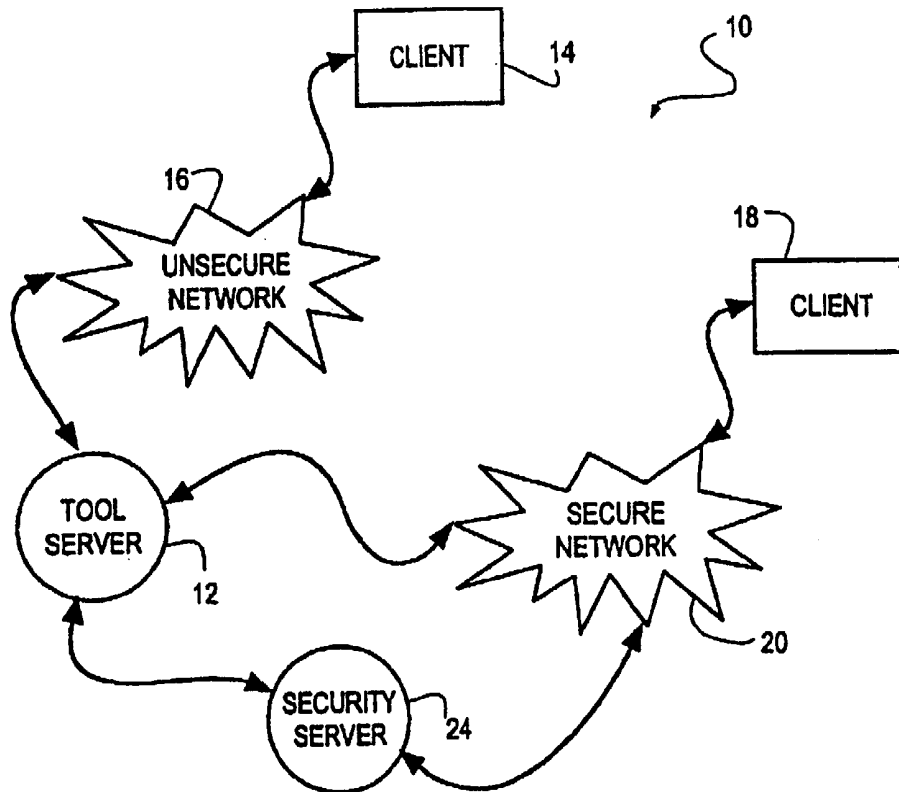
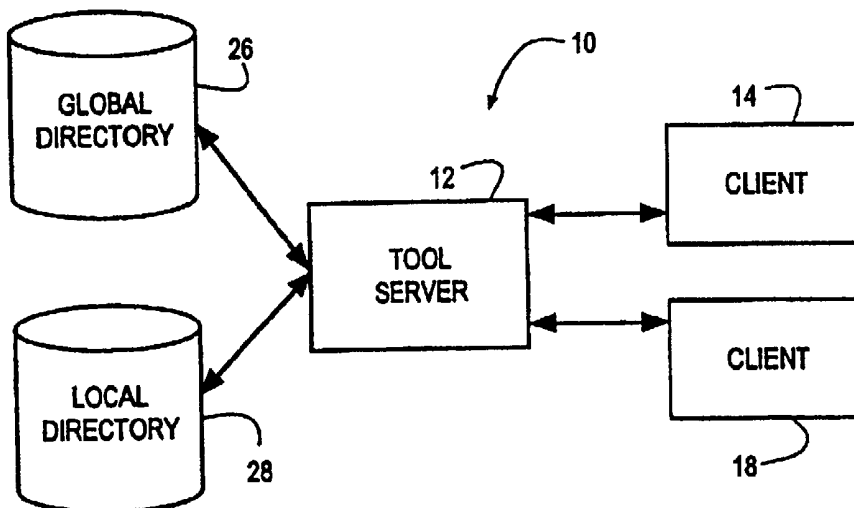
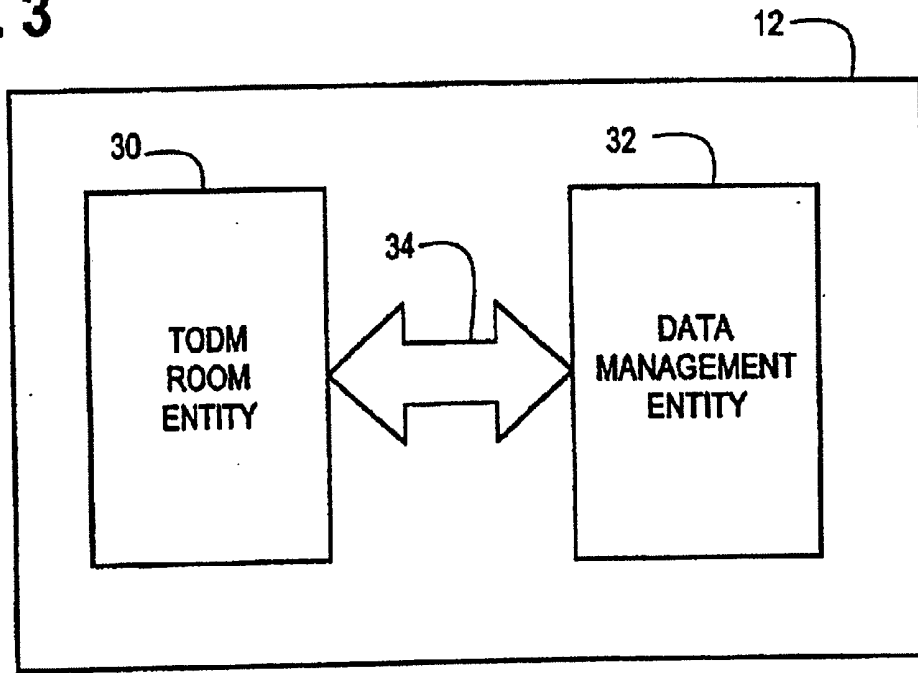


FIG. 2



**FIG. 3**



**FIG. 4**

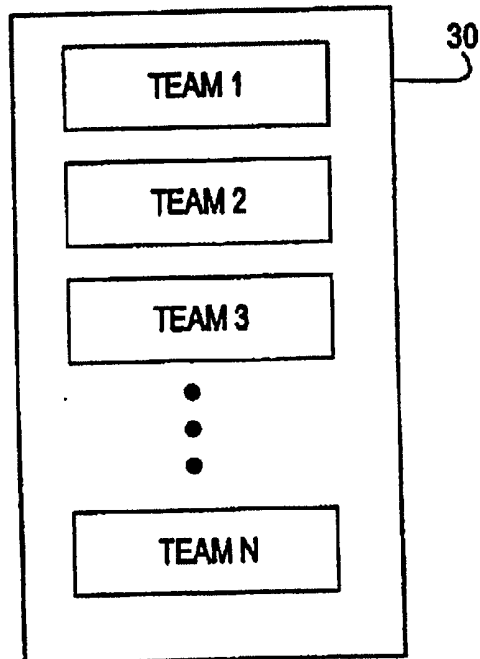


FIG. 5

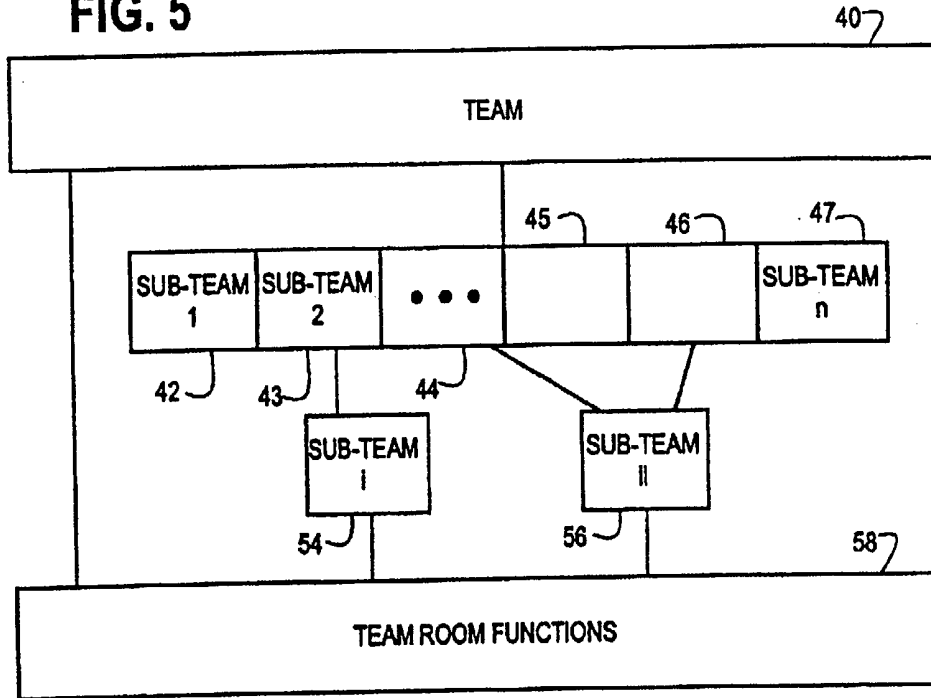
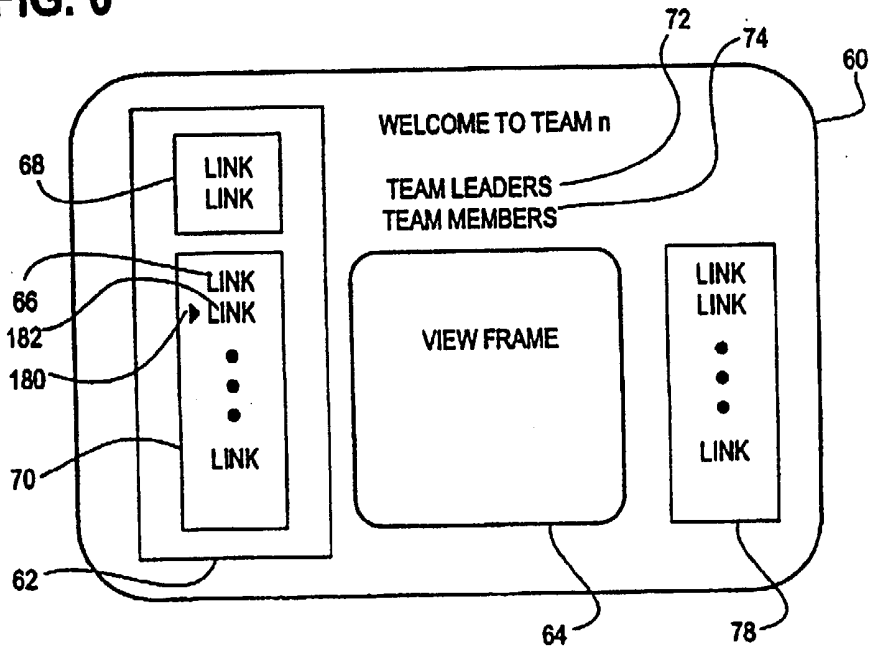


FIG. 6



**FIG. 7**

1. FROM THE LEFT NAVIGATION FRAME, CLICK ON THE ITEM (TEAM CALENDAR, MEETINGS, OR DOCUMENT, ETC.) YOU WANT TO CREATE:

80

- TEAM CALENDAR
- MEETINGS
- ✓ INDEX OF ALL ITEMS
- ✓ DOCUMENTATION
- MY SUBSCRIPTION PROFILES
- INACTIVE DOCUMENTS

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2. SELECT ANY OF THE SUB-ITEMS (IF NECESSARY):

82

- DOCUMENTATION
- BY TYPE
- BY CATEGORY
- BY MILESTONE EVENT
- BY SUBTEAM

---

3. FROM THE RIGHT FRAME, CLICK ON NEW DOCUMENT (OR NEW MEETING, ETC.)

NEW DOCUMENT EXPAND COLLAPSE

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84

THE FORM WILL APPEAR IN THE RIGHT FRAME.

FIG. 8

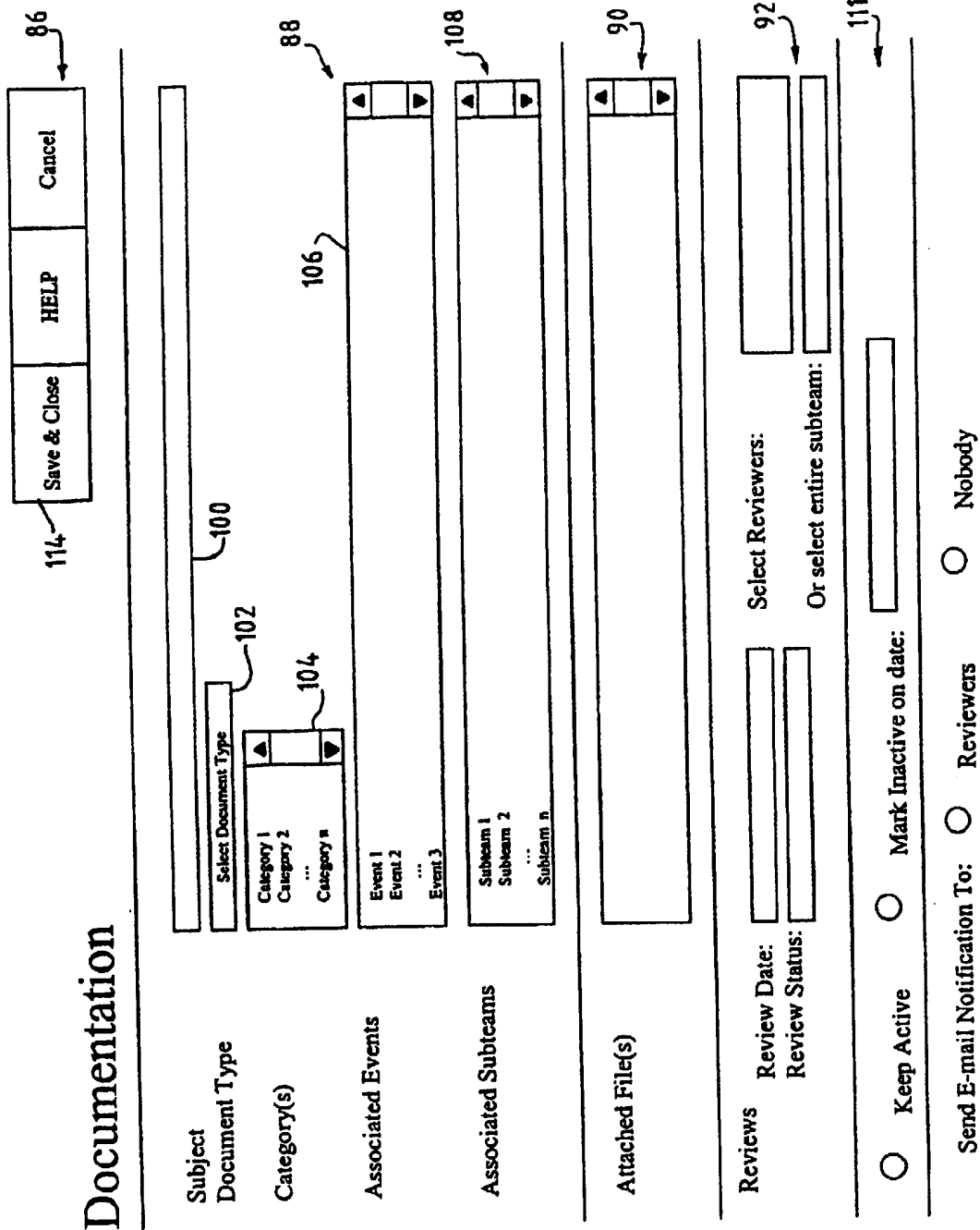
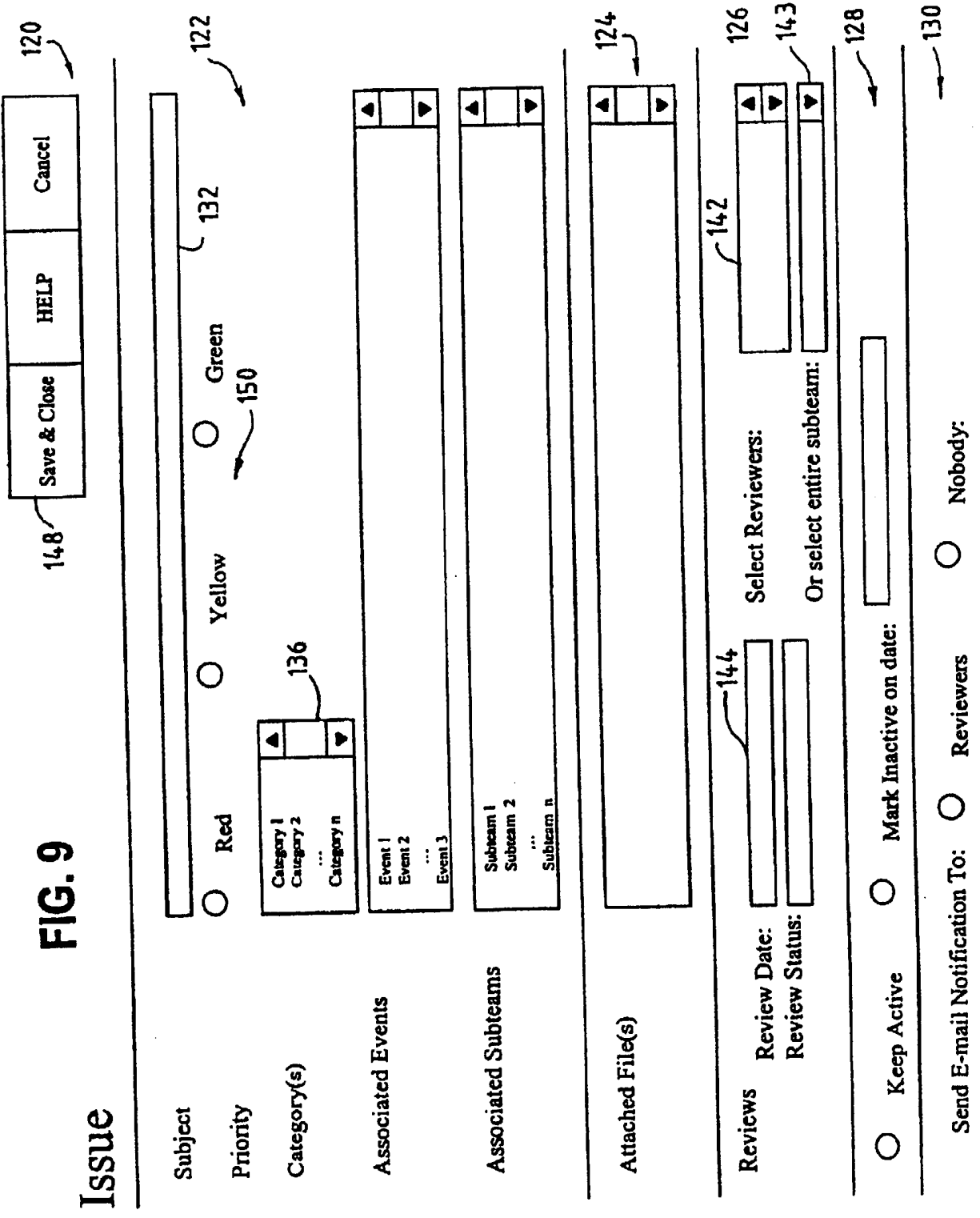


FIG. 9



7/15

## FIG. 10

---

**From:**  
**Sent:**  
**To:**  
**Subject:** FVI Notification: Paper will not support timing (FVI Application Project)

P L E A S E   D O   N O T   R E S P O N D  
T O   T H I S   E - M A I L   N O T I F I C A T I O N

The following is to inform you of activity in a TeamRoom of which you are a member.

**Current Date:**

**Author:**

**Subject:** Paper will not support timing

**Document:** Issue

**Priority:** Green

**Reviewers:**

Click on the link below to view the new item:

<http://www.com/fvi/teamrooms/fviappdev.nsf/Default/1730DEBFB488EF15852568E100592B23?OpenDocument>

154

152



8/15

FIG. 11

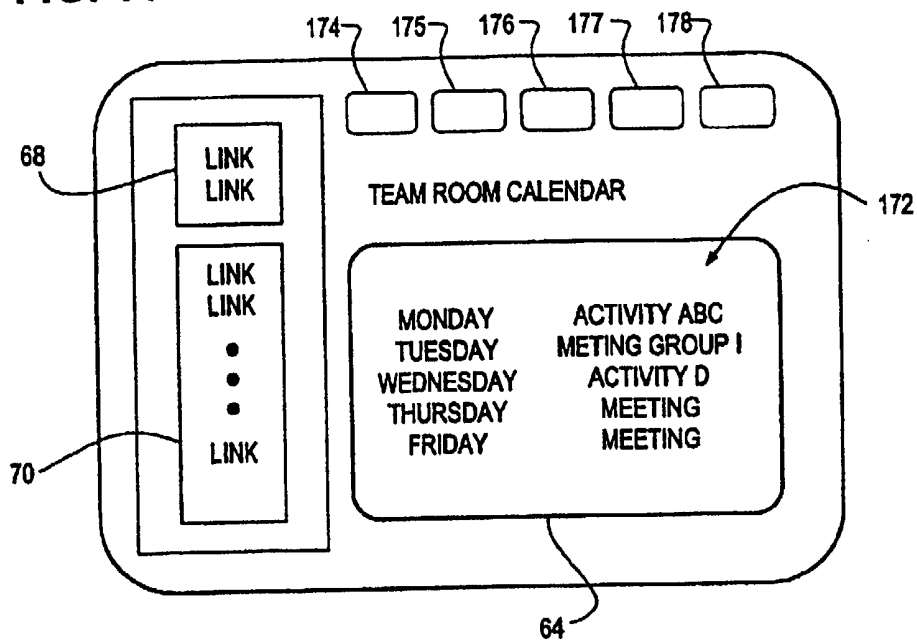
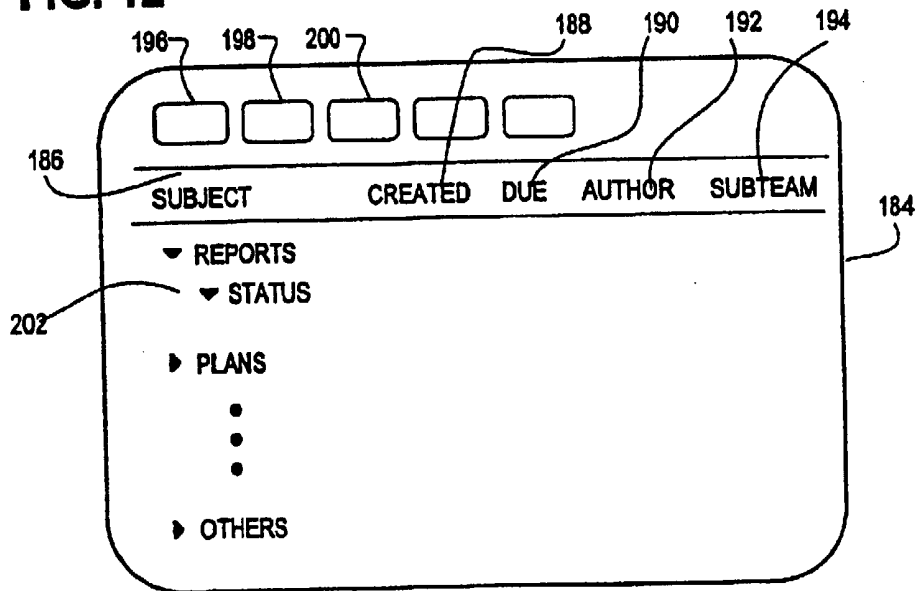


FIG. 12



**FIG. 13**

## New Team Room

---

Team Room Name

Is This A Subteam  Yes  No 222

Application Cluster  
Available Clusters  Enter a New Cluster  Exiting Clusters/Project #'a

---

Team Members	First Name:	Last Name:	Representative Of:	Role:	ID:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Database Identification #  224

Purpose:  226

Welcome Message:

---

Database Identification #	Full Name:	ID Lookup	Comment
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

220

**FIG. 14**

Delete	Edit	HELP	Cancel
--------	------	------	--------

**Description Profile**

Description Profile Name (for e-mail notification) 252

Profile Status: 254

Search Method 256  
Match any word (or)

Keywords 258

New Documents by Author	<input type="text"/>
New Documents by Category	<input type="text"/>
New Documents by Events	<input type="text"/>
New Documents Referencing Subteam	<input type="text"/>
New Documents Containing Word/Phrase	<input type="text"/>
New Documents Assigned to Reviewers	<input type="text"/>

Discussion Threads 260

  
250

FIG. 15

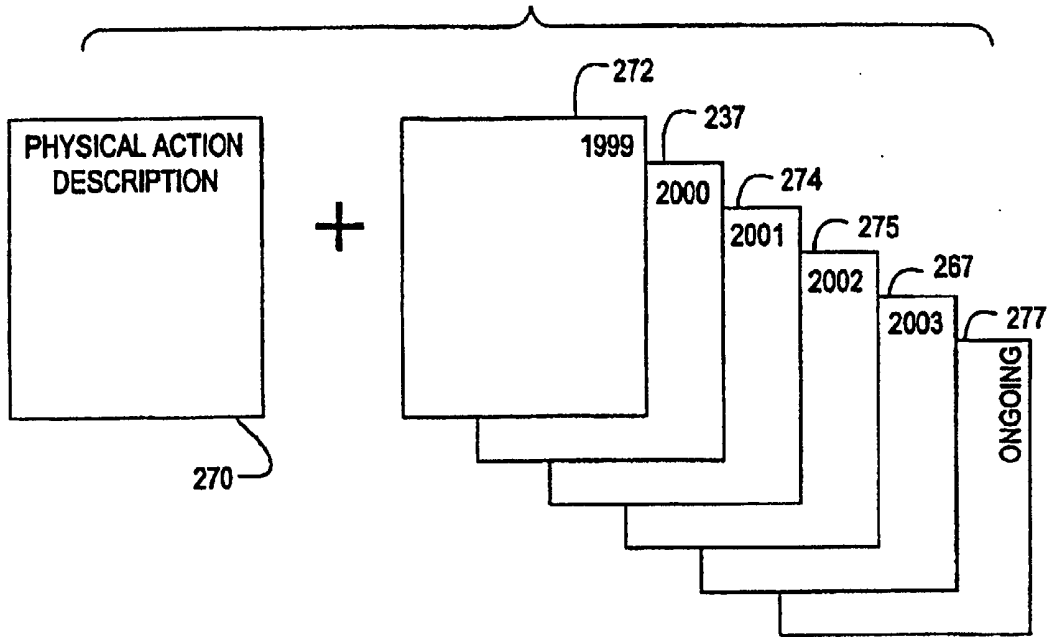
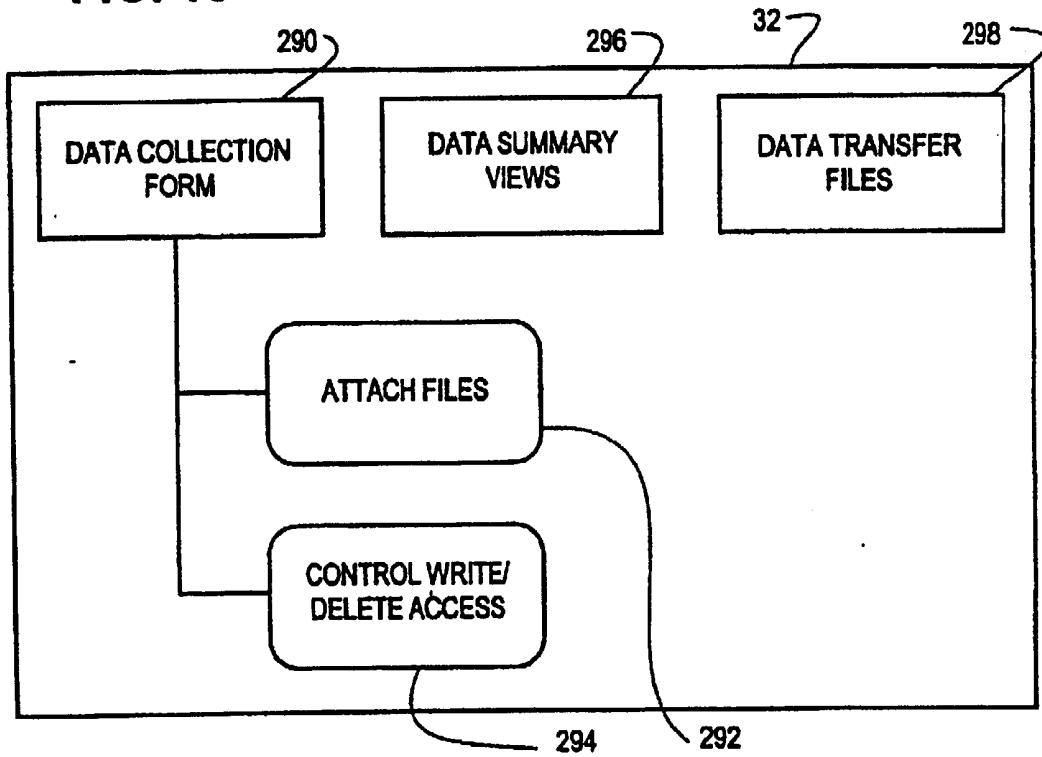


FIG. 16



**FIG. 17**

**Roadmap Template – Action Description**

Included in Financials     Not Included in Financials 302

Project:  304

Sub-Project:  306

Name of Physical  308  
Action Description

Description  310

Action Implementation  312  
Event

Date  314

**Ease of Implementation**

Easy     Medium Difficulty     Hard 316

**Status**

Under Study     Agreed by Team     Agreed by Line Organization 318

**Approval Required**

Activity	Approval <span style="float: right;">320</span>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Book Under Different Project**

Yes (Project)  322  
 No

**Additional Authors**                      **Attach Backup Files**

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Document Information**

Created/Updated By:                       Created/Updated Date:

300

**FIG. 18**

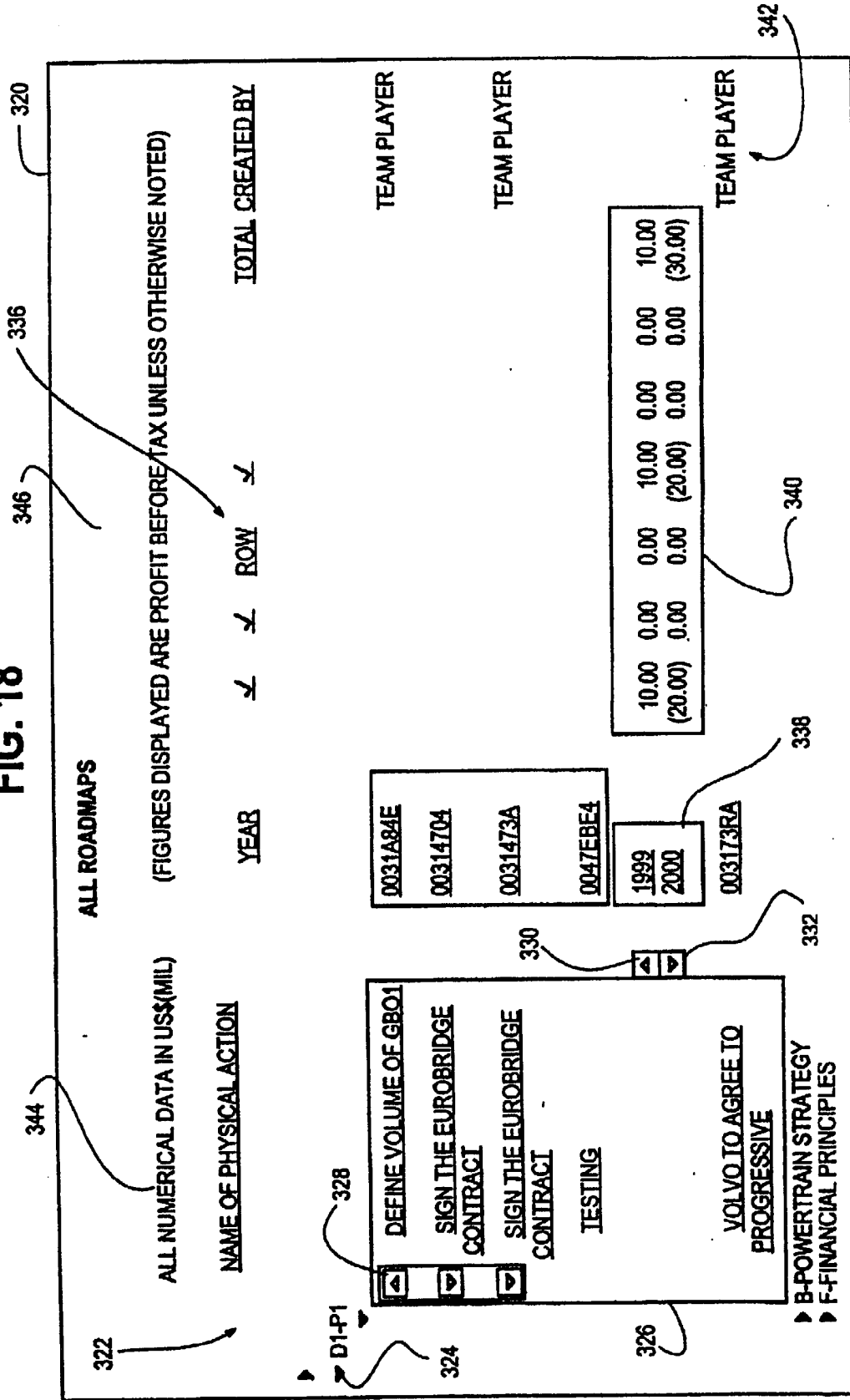


FIG. 19

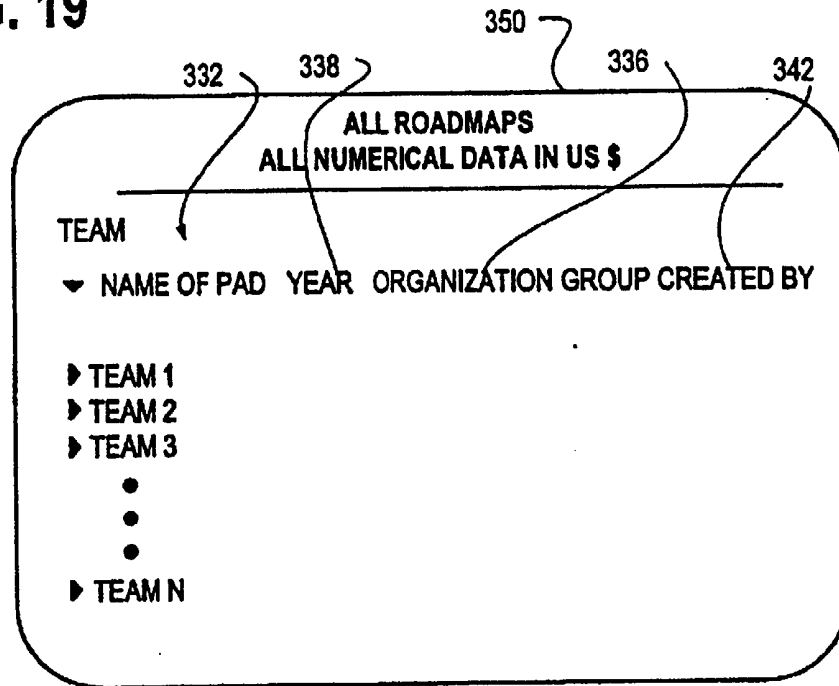


FIG. 20

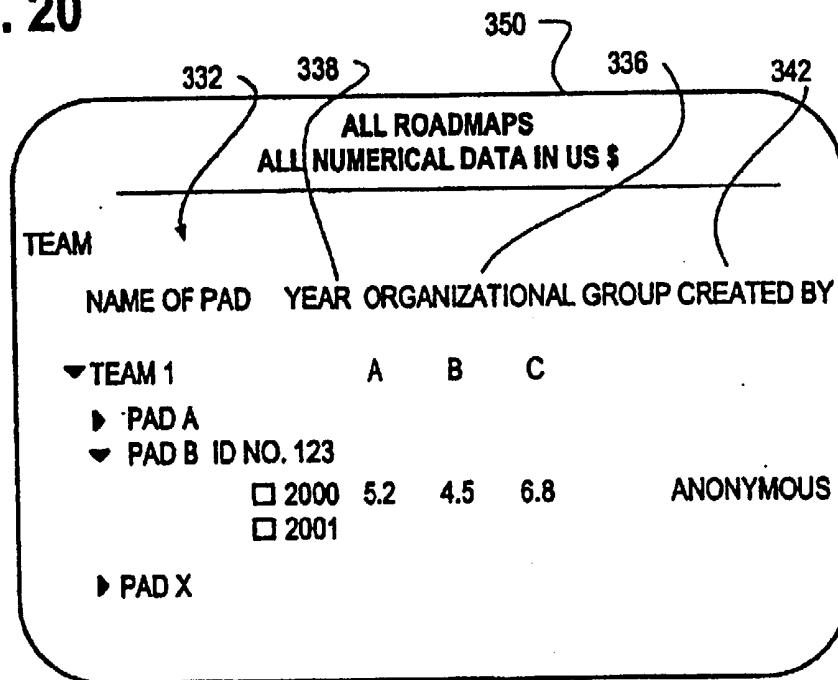


FIG. 21

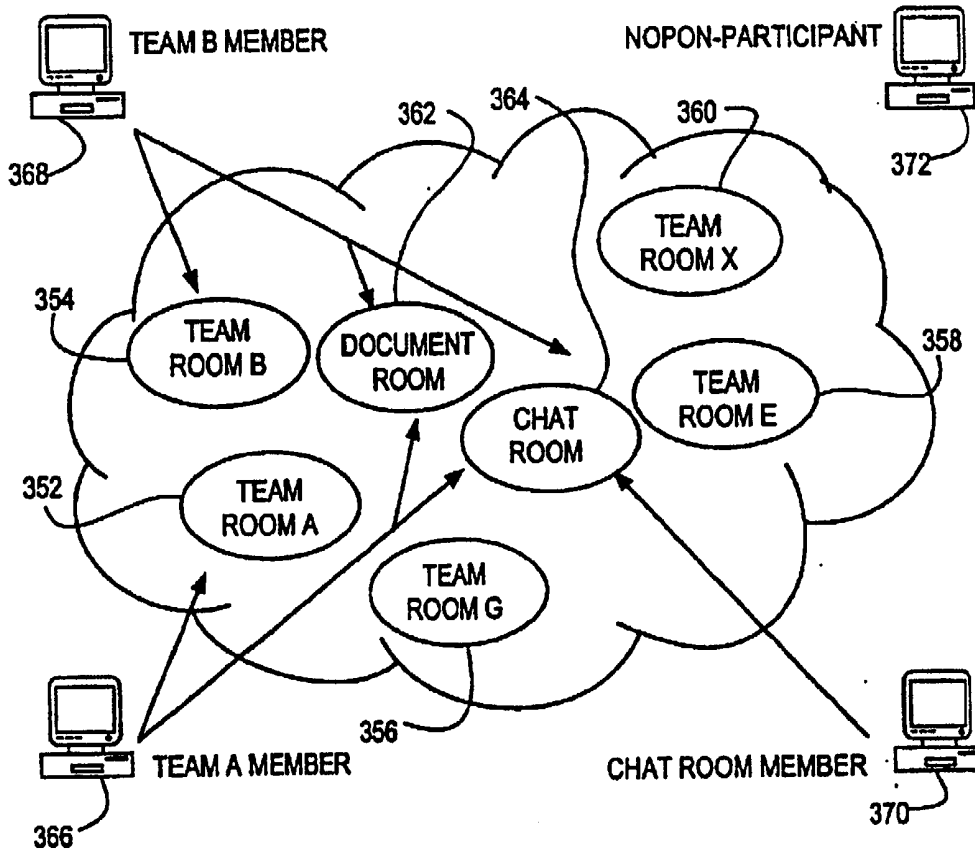
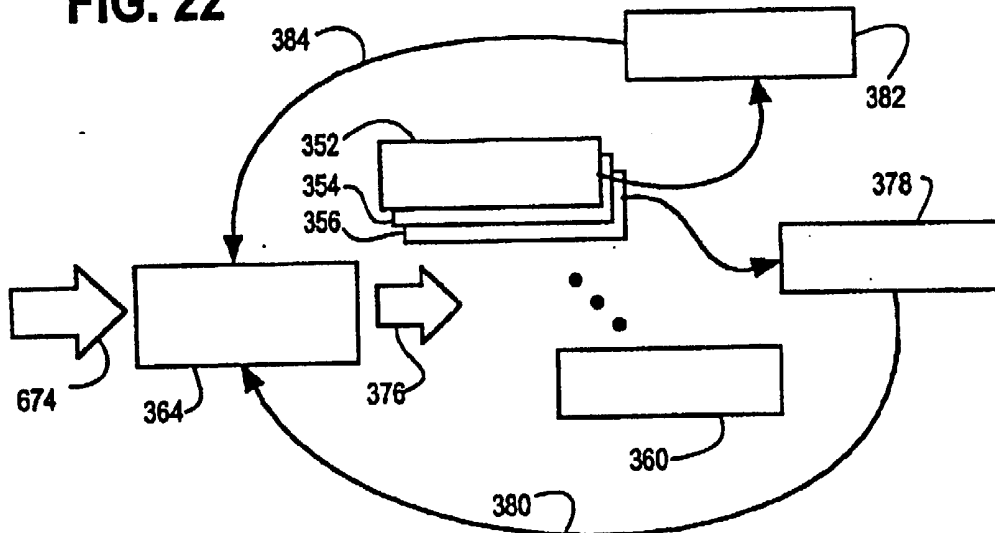


FIG. 22





**A METHOD FOR FACILITATING COMMUNICATIONS AMONG  
TEAM MEMBERS AND NON-TEAM MEMBERS**

5           The invention relates generally to managing data and information, and more particularly, to methods and apparatus for managing data and information between diverse organizations and data management systems.

10           There are many tools available today that facilitate the sharing of information and data. For example, the use of E-mail is prevalent in the modern organization. Local and wide area network technology permits the sharing of information via shared storage areas (e.g., a global shared  
15           drive). The Internet and Intranet technologies permit the sharing of information by way of homepages and the like. There are also applications, such as the Lotus Notes<sup>(RTM)</sup> and Lotus Domino<sup>(RTM)</sup> applications, designed to facilitate the exchange of data and information. Other applications are  
20           known that fulfil the needs of data entry, for example spreadsheets and the like, but these applications are not designed for nor are they well suited to track information in addition to data.

25           Each of these tools has certain advantages and limitations, particularly when viewed in connection with project management. For example, most of these tools are discrete. That is to say, they do not effectively permit the integration of information and data. For example, E-  
30           mail carries a message and may carry additional information by way of attached files. An Internet or Intranet homepage contains information or links to information from various sources. None of the tools facilitates collaborative efforts in connection with the development and editing of  
35           the information. In most cases the integration of

information and data is accomplished off-line, not in real time, and then reported using these various tools.

An additional limitation exists in that all  
5 participants in a project may not use the same tools, may not have all the necessary tools available to them or may encounter institutional limitations in their ability to use the tools they have available. For example, where two large organizations collaborate in a project, these organizations  
10 may have security restrictions that limit the project participants from accessing, using and modifying information and data retained within the various organizations' information management systems. Moreover, the organizations may use differing applications with limited or no  
15 compatibility.

The project room, i.e., a physical conference room or "war room," has been often used to assist in managing a project by providing a common area where project  
20 participants can keep and share data and information, where project tracking information may be displayed and shared, and where the project members and project managers can meet to assign tasks and to track the progress of the project. The significant limitation with the project room is that the  
25 information and data is only accessible from the project room. The project participants may not be physically co-located, and in fact, may be located on different continents and in different time zones. Online meeting tools, such as "Microsoft NetMeeting" (Registered Trade Mark) or "Lotus  
30 Sametime" (Registered Trade Mark), permit the project participants to meet and confer without being co-located, but still do not provide a convenient mechanism for permitting the project participants to collaborate and share information and data or to provide notifications to project  
35 participants that there is new information and/or data available.

It is an object of this invention to provide a system and method for better managing the sharing of information and data and for managing the collaborative efforts of team members.

According to the invention there is provided a method of providing communication and collaboration among team members and non-team members, wherein the team members include first members of a first group of members and the non-team members include second members of a second group of members, organizationally disparate from the first members, the method comprising the steps of providing a teamwork tool server supporting a team room environment, the teamwork tool server being coupled to the first members via a first network structure and to the second members by a second network structure for providing access to the team room environment by each of the team members and the non-team members, providing within the team room environment a first collaboration environment and a second collaboration environment, permitting access by the first members to the first collaboration environment and the second collaboration environment and permitting access by the second members only to the second collaboration environment.

The first collaboration environment may comprise a team room.

The second collaboration environment may comprise one of a document room and a chat room.

The first network structure may comprise one of an unsecured network and a secured network.

The second network structure may comprise one of an unsecured network and a secured network.

The unsecured network may be the Internet.

The secured network may be a local area network.

5 The invention will now be described by way of example  
with reference to the accompanying drawing of which:-

10 FIG. 1 is block diagram representation of a system in  
accordance with a preferred embodiment of the invention;

FIG. 2 is a block diagram representation further  
illustrating the teamwork tool illustrated in FIG. 1;

15 FIG. 3 is a functional block diagram of the teamwork  
tool illustrated in FIG. 1;

20 FIG. 4 is a block diagram representation of teams  
defined within the teamwork tool and in accordance with a  
preferred embodiment of the invention;

FIG. 5 is a block diagram representation of a team of  
the teams and sub-teams illustrated in FIG. 4;

25 FIG. 6 is a graphic representation of a team web page  
in accordance with a preferred embodiment of the invention;

FIG. 7 is a graphic representation of a portion of the  
web page illustrated in FIG. 6;

30 FIG. 8 is a graphic representation of a portion of a  
team web page associated with documentation entry into a  
teamwork tool in accordance with a preferred embodiment of  
the invention;

35 FIG. 9 is a graphic representation of a portion of a  
team web page associated with issue entry into a teamwork

tool in accordance with a preferred embodiment of the invention;

5 FIG. 10 is a graphic representation of an issue notification;

10 FIG. 11 is a graphic representation of a team web page associated with a calendar feature of a teamwork tool in accordance with a preferred embodiment of the invention;

15 FIG. 12 is a graphic representation of a portion of a team web page associated with a document tracking feature of a teamwork tool in accordance with a preferred embodiment of the invention;

20 FIG. 13 is a graphic representation of a portion of a team web page associated with creation of a team room environment within a teamwork tool in accordance with a preferred embodiment of the invention;

25 FIG. 14 is a graphic representation of a portion of a team web page associated with a subscription feature of a teamwork tool in accordance with a preferred embodiment of the invention;

FIG. 15 is a block diagram representation of a data entry entity within a teamwork tool in accordance with a preferred embodiment of the invention;

30 FIG. 16 is a block diagram representation of a physical activity description and associated reporting elements within a teamwork tool in accordance with a preferred embodiment of the invention;

35 FIG. 17 is a graphic representation of a portion of team web page associated with the creation of a physical

activity description within a teamwork tool in accordance with a preferred embodiment of the invention;

5 FIG. 18 is a graphic representation of a portion of team web page associated with the entering of data into the teamwork tool in accordance with a preferred embodiment of the invention;

10 FIG. 19 is a graphic representation of a portion of team web page associated with the reporting of data from within the teamwork tool in accordance with a preferred embodiment of the invention;

15 FIG. 20 is a graphic representation of a portion of team web page associated with an alternate reporting of data within the teamwork tool in accordance with a preferred embodiment of the invention;

20 FIG. 21 is a graphic representation of team interaction within a team room environment in accordance with a preferred embodiment of the invention; and

25 FIG. 22 is a graphic representation of team interaction within a team room environment in accordance with an additional preferred embodiment of the invention.

The invention is described in terms of several preferred embodiments that should be taken to be illustrative of the invention and not limiting thereof. For example, the invention is described in terms of a system and method adapted to utilize the Internet as a medium for providing information and data management and sharing between diverse project team members. That is to say, the project team members may be part of diverse functional organizations within one or more larger organizations, may be geographically separated, or may utilize differing

30  
35

information management tools to perform their work activities. Moreover, while the information and data described in connection with the preferred embodiments is generally financial in nature, the invention is not limited  
5 to the management and sharing of financial information. For example, the invention may be used to manage technical information and data such as product design specifications and testing data, marketing and demographics data such as product promotion and target audience data, and the like  
10 without departing from the fair scope of the invention.

In accordance with the preferred embodiments of the invention, a system and method provide for the capture and tracking of information and data input to the system by  
15 numerous diverse team inputs. The teams may be based upon the organization of the project entity or entities (e.g., the corporate organizations) or may be organized in view of the particular project. The invention has applicability to any large project that includes multiple sub-projects having  
20 multiple and diverse sources and users of project information and data. The invention has particular application where the team members are not physically collocated.

In additional aspects of the invention, the information and data received from the many sources is presented to project participants and management in a consistent manner. For example, project information associated with particular  
30 issues or concerns is presented in a consistent format or with consistent identifiers that facilitate management review. Information and data are made readily available to the team members that use the information and data to do their work. Management is provided a consistent mechanism for disseminating information, assigning and tracking tasks  
35 and raising and responding to issues.

The system and method further provide functions in connection with the information and data such as notification on the arrival of new information or data, information and data archiving and information and data tracking and reporting functions.

For example, when a document is revised, it is possible to save the document as a "New Revision." Document information, such as author, date, subject, and current revision number, as well as each version of the document, are retained in a team room environment. Thus, the team members may view the revision history of a document and/or access prior versions of the documents. The document revision information may also be used in presenting the information and data to non-team members and/or management.

For example, presentation may be limited to only the latest version of a document when the document is being viewed from outside the document management function.

In addition to the information and data management features of the invention, in accordance with another preferred embodiment of the invention, these management features are combined with instant communications tools to permit real time collaboration on documents or other information and data.

It will be appreciated that the invention may be implemented as an Internet-based tool to support the project teams. Use of a wide area network, such as the Internet or an Intranet, permits team members that are geographically and time-zone separated to work with a single source of information, thus providing a highly collaborative working environment.



Many additional aspects and features of the invention will become apparent to one of ordinary skill in the art from following detailed description of the preferred embodiments of the invention.

5

Referring to FIGS. 1 and 2 of the drawings, a system 10 for managing communications and collaborations among team members 10 includes a teamwork tool server 12.

10

The teamwork tool server 12 is coupled to a first user or client 14 via an unsecured wide area network 16, such as the Internet. A second user or client 18 is coupled to the teamwork tool server 12 via a secured wide area or local area network 20, such as a corporate secured intranet. This  
15 allows access from secured network 16 and unsecured network 20 at the same time.

15

The teamwork tool server 12 may be a personal computer or other suitable server capable of supporting a web-based  
20 application written using "Lotus Domino" (Registered Trade Mark) development tools, HTML programming language, JAVA<sup>(RTM)</sup> or other similar web development languages. As such, and as well known in the art, the teamwork server 12 will include a processor and associated memory and storage within which a  
25 control program that directs the operation of the processor is retained and further in which data, including documents, information, numeric data, and the like may be stored. The teamwork server 12 is also coupled to a security server 24.

25

30

Referring more particularly to FIG. 2, the teamwork server 12 may access both a global directory 26 and a local directory 28. The global directory 26 may contain data associated with all members of a group including all possible users of the system 10, whether team members or  
35 visitor/guest users, and for each such user includes at least one user identification. The local directory 28

35

contains data entries associated with the particular users of the system 10, and may further utilize the user identification employed in the global directory.

5           Functionally, and referring to FIG. 3, the teamwork server 12 includes a team room entity 30 and a data management entity 32. A communication link 34, such as a data bus, links the team room entity 30 and the data management entity 32 such that information may be shared and  
10           synchronized between the two entities, as will be described. Moreover, while shown implemented together on the teamwork server 12, it will be appreciated that the team room entity 30 and the data management entity 32 may be separately implemented and operated.

15

          In accordance with a preferred embodiment of the invention, project participants, i.e., users of the system 10 or team members, using the team room entity 30, define one or more team rooms in a virtual environment to support  
20           the overall project. Generally a large project will be broken into smaller sub-projects and a team room environment is created for each of these sub-projects.

          For example, within the team room entity 30 there may  
25           be defined a number of teams, and teams 1-n are illustrated in FIG. 4.

          These virtual, team room environments are accessed through the unsecured network 16 or the secured network 20  
30           or other networking architecture, and facilitate the sharing of information and the linking of data for diverse groups of users. That is, each team member is given access to a team room environment supporting the project or sub-project associated with that team and that the team member is  
35           involved with.

Multi-levels of access may be provided. For example, an open level access may be provided that permits access by a wide number of users to a limited selection of project information and data. A restricted level of access may be provided such that only team members, management and other authorized users may access, modify, add or delete project information and data retained within a team room. Wide access to selected project information allows everyone within the organization and included within the global directory 26 a level of participation in the project. Restricted level access to only those team members or users having a profile within the local directory 28 ensures the integrity of the information and data, as these users will be the only users with authority to enter or edit information and data within the team room environment.

The security server 24 and the local directory 28 cooperate to provide the multiple levels of access. The security server 24 is invoked upon access by a user to the teamwork server 12. The security server 24 operates to verify a user's identity based upon an entry within the global directory 26, and upon verification of such, the user may be granted access to the teamwork server 12. Within the local directory 28, associated with the user, is a user profile that defines the level of access granted to the user. For example, users unknown to the local directory 28, i.e., not having a profile, may be granted guest status within the team room environment. Team members and users of the teamwork tool are granted access according to their level of authorization. For the client 18 accessing the teamwork server 12 via the secured network 20, a verification process utilizing the security server 24 may not be required. Upon access to the secured network 20 by the client 18, the security server 24 is invoked to verify the user's identity. Access to the teamwork server 12 from the secured network 20 therefore would not require a further

verification, although one may be provided if deemed necessary for security purposes.

FIG. 5 illustrates the structure of one of the teams supported by the teamwork server 12. The team 40 includes a plurality of sub-teams 42-47, which may themselves include sub-teams 54 and 56. Sub-team 54 is shown dedicated to sub-team 43 while sub-team 56 supports activities of sub-teams 44 and 46. Supporting team 40 and each of the sub-teams is a layer of team room functions 58, such as documentation management, calendar, issue, assignment, news and the like. Each team and sub-team may have its own organization separate from the organization form which the team members are drawn.

15

For example, the organization may have a functional organization, while the team is organized by product category. Thus, the team room environment can support activities for a number of different organizational structures.

20

The environment for the team room may be configured to appear to the user as a web page.

FIG. 6 illustrates an exemplary team room web page configured as a home page. The page 60 is split with a navigation frame 62 disposed on a left hand side of the page 60 and a view frame 64 on the right hand side. By linking to information from the navigation frame 62, users can view the contents of those links in the view frame 64, which is generated responsive to clicking the associated link. One link is identified, for example, as link 66. The links are separated and arranged into several groups, and two groups 68 and 70 are shown in FIG. 6. Additional groups of links may be used. The purpose of separating the links by groups is to provide to particular users links that are available

35

to them for use according to the granted level of access to the team room.

For example, a team leader may have access to the first  
5 group 68 of links relating to team room administration and  
to the second group 70 of links relating to general team  
room functions. A team member may only have access to the  
second group 70 of links, and would not be presented with  
the first group 68 of links. A guest user may be presented  
10 still a third group of links associated with access  
permitted to guest users.

The page 60 may contain active graphics and provide  
team room members various pieces of information upon  
15 entering. For example, the page 60 may identify the team  
leaders 72 and the team members 74 and may further provide  
an indication of the team room members presently in the team  
room and available for collaboration via a chat room or  
other interactive environment, which may be joined or  
20 entered via another link (not depicted). The page 60 may  
include graphics and images within the view frame 64 and  
links to help pages 78. The particular arrangement of the  
team room home page 60 is not particular to the invention,  
and it should be appreciated that numerous adaptations may  
25 be created.

As noted, the links 68 and 70 allow the users to link  
to and view the content associated with the link. Exemplary  
links 70 may include a project home page link to take the  
30 user to the project home page; a team home page link to take  
the user back to the particular team home page and a table  
of contents link providing a listing of the available  
contents of the team room. Management, organization and  
information sharing links may be provided including a news  
35 link; a calendar link; a meetings link; an assignments link  
and a documents link.

The many purposes for the team room include being the information repository for the sub-project. This information may include meeting minutes of all types, reports and presentations, issues and calendar and news items. This information is stored within the memory and storage of the teamwork tool server 12 as documents as described more fully below. Additional information may include project or sub-project Numeric Data, assignment distribution and tracking information and team collaboration information also described more fully below.

The types and format for information and data that the team room will accept is defined, e.g., a document, issue, assignment, calendar item or news. In addition, the information and data may be organized by the sub-team, category or event to which it is relevant. Definition and organization of the information and data facilitates its use and review by the team members and by visitors to the team room. Referring to FIG. 7, information is added by clicking within the navigation frame 62 on the information type that is to be created, e.g., documentation, as illustrated at 80. If there is a sub-category for the information, such is selected at 82. Finally, the new document button is selected at 84, and a new document form 86 (FIG. 8) will appear in the frame 64.

The new document form 86 is arranged to facilitate entry of various information about the new document, and it is divided into a basic information section 88, a content section 90, a reviews section 92, an active/inactive section 94 and an email notifications section 96. The basic information section includes fields for subject 100, document type 102, category 104, associated events 106 and associated sub-teams 108. The content section 90 is a general text field. The reviews section allows the team

member entering the document information to identify the additional team members who will be responsible for the review of the document. The actual reviewer(s) is selected from a list 110 of potential reviewers that is restricted to  
5 particular team members or management. This ensures that documents are not widely disseminated without having first been reviewed by an authorized team member or management.

Alternatively, the team itself may be designated by  
10 selecting box 113. A due date for the review may also be assigned at 112, but is not required. Advantageously, information may be communicated to the team members for informational purposes by designating the team as the reviewer and not assigning a due date. The document may be  
15 marked as active or inactive or may be set to become inactive after a predetermined period of time, 111. Ordinarily a document will be marked as active and then later edited to become inactive. Pressing the save and close button 114 does the same.

20

In order to preserve the currency of the information retained within the team room, an auto-deletion feature may be added to the team room functionality. After a specified amount of time, the author and/or designates of a document,  
25 issue, assignment or other item of information retained within the team room is notified that the information has become dated. At that time, the author may be requested to update the information, archive it or delete it. Absent a response from the author to one or more requests to update  
30 the information, an automatic deletion or archiving process may take place.

There exists multiple document types, and the various document types accepted are also defined. Additionally,  
35 electronic files may be deposited within the team room in the format of the application used to create them. The

electronic files retained within the team room may be downloaded to the participant's local machine, e.g. the client 14 or the client 18, and read using a similar application used by the author to create the file, edited if desired and reposted to the team room for sharing. The document may be saved on the participant's local machine and transmitted via other means to non-team colleagues if desired. Threaded discussion may also take place within the team room on any document stored there.

10

A feature of the team room is that any team member may raise an issue at any time, and a team member does so by creating an issue (e.g., an issue document) using a procedure similar to that outlined in FIGS. 7-8, above.

15

Upon selecting the new issue link from the navigation frame 62 to create a new issue, a new issue form 120 appears in the view frame 64 (FIG 9). The new issue form is similarly laid out as the new document form 86, and is divided into a basic information section 122, a content section 124, a reviews section 126, an active/inactive section 128 and an email notifications section 130. The basic information section includes fields for subject 132, category 136, associated events 138 and associated sub-teams 140. The basic information section also includes a priority selection 150 for the issue. The priority may be color coded with red corresponding to high priority, yellow medium priority and green low priority, or other conventions may be used.

30

The content section 124 is a general text field. The reviews section allows the team member entering the issue to identify the additional team members who will be responsible for the review of the issue. The actual reviewer(s) is selected from a list 142 of potential reviewers that is restricted to particular team members or management. A due

35



date for the review may also be assigned at 144. The issue may be marked as active or inactive. Ordinarily an issue will be marked as active and then later edited to become inactive, or expire automatically by setting an expiration  
5 date 146. Pressing the save and close button 148 does the same. Upon saving and closing the new issue form 120, if the notifications option 130 has been selected, an email notification 152 (illustrated in FIG. 10) is sent to the reviewers. The new issue document itself is not sent to the  
10 reviewer, instead a link 154 is provided in the notification 152 that takes the reviewer to the team room and the opens the issue document.

In addition, additional email notifications may be  
15 provided to the issue assignor and/or assignee at later dates, and may be specified relative to the due date. Of note is that if the reviewer is not within the secured network, before being provided access to the team room and the issue, the security server 24 is invoked.

20  
To avoid issue overload, upon raising an issue the team member must assign a reviewer, e.g., a member of the team. The reviewers may be a restricted sub-set of the team members, and for example may be the team leader(s) and/or  
25 their delegates. Until the reviewer has reviewed the issue it is not made available to all of the team members nor may it be raised to management. Since issues typically result in the making of assignments, the team room may be configured to automatically generate assignments when an  
30 issue is raised. Issues and issue-generated assignments may be distinguished from ordinary assignments either by a separate designation, or by the identification of the reviewer in association with the issue-generated assignment. Assignments may also be coded to distinguish priority. For  
35 example, an icon may be disposed adjacent the assignment,

the colour or shape of which identifies the importance, priority, urgency or other characteristic of the assignment.

Another feature of the team room is a team calendar and news function. Any team leader can add items to the team calendar, and all team members have access to the team calendar.

An example of the team calendar 170 is illustrated in FIG. 11, which upon selection of the calendar link from the navigation frame 62 appears in the right frame 64. Illustrated in the view frame 64 are calendar pages 172 displayed by day, week, month or year. Across a top of the calendar pages 172 are buttons 174-178 that allow for the creation of new events, meetings, allow for manipulation of calendar display and allow access to help or cancel activities.

News items, that may added or accessed from a news link within the navigation frame 62, can be configured to be posted by any team member, or posting and editing of news items may be limited to the team leader or designates to avoid generating too many news items. Similarly, responses to news items may be limited to particular team members, but not necessarily so.

In connection with the purpose of the team room for tracking the progress of the project or sub-project, milestone events in the project may be tracked on the calendar. Similarly, news items may be linked to milestone events such that upon the passing of the milestone event the news item is automatically archived.

Of note from the navigation frame 62 (FIG. 6) are the twisties 180 disposed next to certain links, for example a link 182 associated with documentation. Clicking the

twistie expands a list of documents 184 (FIG. 12). Under the subjects 186, the documents associated with that listed subjects are displayed. Clicking on the document within the list 184 takes the user to the document within the team  
5 room. The list 184 also provides additional information about the document such as creation date 188, the due date 190, if any, the author 192 and the associated sub-team 194. The list also permits creation of new documents via the new document button 196, and help and cancel buttons, 198 and  
10 200, are also provided. If there are additional files or attachments associated with the document, a paperclip icon 202 appears next to the document in the list 184.

While the team room may represent a sub-project of a  
15 larger project, it is also possible for the team itself to create sub-teams (FIG. 5). Information and data, such as documents, news events, and the like, may be linked to particular sub-teams. Similarly, assignments may be linked and tracked by sub-team. The sub-team concept may be  
20 extended further to categories under each sub-team. The ultimate level of refinement will be dependant upon the complexity of the project/sub-project/sub-team/category.

While the calendar function provides a tool for  
25 tracking events, meetings, due-dates and the like, a separate posting of events and meetings provides focus for the team. For example, more attention may be drawn to critical deadlines by marking it as an event than if the event only appeared on the calendar. Preferably the event  
30 and meeting data are associated with the calendar data so that each are updated accordingly upon the passing of the particular date.

Preferably a "New" function is accessible from each  
35 page associated with the team room for adding issues, assignments, events, milestones, meetings, documents, etc.

A team member would merely have to click on the "New" button to be taken to appropriate directions for entering the appropriate information and/or data.

5           In accordance with the preferred embodiments of the invention, the team room environment is configurable by the users of the team room. As noted in connection with the discussion associated with FIG. 6, particular team members, such as team leaders and administrators, are given access to  
10 additional links beyond those links available to general team members. One such link permits the team leader to configure the team room using a New Team Room template 220 shown in FIG. 13. The template 220 is arranged to obtain various information about the new team room, and it is  
15 divided into a basic information section 222, a team member designation section 224 and an additional information section 226. The basic information section 222 includes entries to identify the team room name, whether the team-room is a sub-team and project identification. The team  
20 member designation section 224 permits entering information associated with the team members including the user identification by which the user is identified in the global directory. The additional information section 226 permits the configuration of the team room home page, for example,  
25 adding a welcome message and further permits the identification of contact persons associated with the team room.

A team room, such as described above in connection with  
30 a preferred embodiment of the invention, allows team members in a cross-functional or diverse organization to effectively interact. The team room permits the exchange and collaborative development of information and data even where the team participants are not physically collocated. In  
35 accordance with an additional preferred embodiment of the invention, collaboration of team members is further

facilitated by use of the team room concept in combination with communication capability.

In one preferred implementation of this aspect of the invention, the team room is linked with an E-mail service. Upon entry of information or data, such as tasks, documents, meeting forms, team news, etc, the team member may immediately and automatically E-mail a notification to each team member that the new information or data exists within the team room. This is accomplished by associating an email notification feature with the creation of each new document entered into the team room. The notification does not deliver the actual documents to the recipient, but instead, provides a link back to the team room such that the team room members may then enter the team room to view the new information or data, add to or modify the information or add commentary.

In another preferred implementation, the team members themselves may designate when and how they are informed that new information or data has been added to the team room. From the subscription profile link on the navigation frame 64, the team member is taken to a subscription profile form 250 illustrated in FIG. 14. The subscription profile form 250 allows the team member to provide a description of the profile 252, designate whether the profile is active 254, designate a search method 256 and identify keywords associated therewith 258, and to further designate whether or not to receive entire discussion threads 260. Similarly, the team member may specify to be informed each time there is new information or data associated with a particular author, category, event, sub-team or etc.

To further take advantage of the collaborative features of the team room, it may also be linked with a real time communication application.

For example, the team room may be linked with "Microsoft NetMeeting" (Registered Trade Mark) or "Lotus Sametime" (Registered Trade Mark). More simply, the team room may be linked with a chat room environment feature. In this manner, online real time meetings of team members with real time collaboration on documents or virtually any information or data retained within the team room can occur. The participants need not be physically collocated and the integration of information and data occurs in real time, online. Moreover, a reliable version of the information will be in existence, and will be available for every team member's use.

Referring to FIG. 21, within a team room environment 350, there is defined team rooms, respectively identified team rooms 352-360, a document room 362 and a chat room 364. The team rooms may be defined as described above. The document room may be room defined specifically to facilitate document collaboration between team members, while the chat room 364 may be just that, a room that allows the team members to enter and exchange thoughts and ideas. A first team member 366 is linked to and participating in team rooms 352, document room 362 and chat room 364. A second team member 368 is linked to and participating in team rooms 354, document room 362 and chat room 364. A non-team member 370 may be linked only to the chat room, and a non-participant member 372 is not linked to the team room environment 350.

Referring to FIG. 22, the team members 366 and 368 and non-team member 370 input information 390, i.e., thoughts ideas, documents, etc., into the chat room 364. Within the chat room 364 team member 366, for example, may create a task, raise an issue or have a question but is uncertain to which team it should be directed. From the chat room 364, the task, issue or question (issue) 374 is assigned to any

combination of each of the teams 352-360. The team leaders, respectively, can then respond to the issue. For example, the team leader of team 354 may provide a response 376, indicating that the issue 374 is not one for which it has  
5 responsibility. This action causes a notification to the original requestor, the other assignees and a posting 378 to the chat room 364. The team leader for team 356 may provide a response 380, indicating that team 356 is responsible for the request, and may provide an answer. This action causes  
10 a notification to the original requestor and the other assignees and a posting 382 to the chat room 364. Numerous other interactions may be contemplated.

As facilitated by the preferred embodiments of the  
15 invention, a project may be supported by team members designated from various entities of cross-functional or diverse organizations. This is true even where the team members are significantly separated geographically. The team room environment described above provides a tool that  
20 permits these team members to organize, manage and track data and to collaborate. To further facilitate the project, the data collection entity 32 of the teamwork tool server 12 (FIG. 3) provides a numeric data tracking and collection  
process.

25  
In accordance with a preferred embodiment of the invention, the project or sub-project itself is defined by a project Roadmap. The project Roadmap is a collection of physical action descriptions (PADs) that, as the name  
30 suggests, each describe a single discrete action or activity that must be completed by the team in order to complete the project. Not so literal, however, a PAD can be defined for virtually any discrete aspect of the project whether it is a physical task, the occurrence of an event, or some other  
35 criteria that relates to the successful outcome of the project. Illustrated in FIG. 15, a physical action

description 270 is associated to a number of reporting cycles or periods 272-284. For example, data associated with the physical action description 270 is recorded by years. The data collection entity 32 facilitates the  
5 definition of the PADs and the corresponding collection and reporting of the data.

Referring now to FIG. 16, the data collection entity 32 includes a data collection function 290 including an attach  
10 files function 292 and an access control function 294. The data collection entity 32 also includes a data transfer files function 298, which provides utility functions for the import/export of data from the data collection entity 32.

15 Data collection begins with the definition of the PAD, and FIG. 17 illustrates a template 300 for defining a PAD. The template 300 is arranged to facilitate the collection of certain information, including an indication of how the data is to be used, i.e., whether the data is to be included  
20 during reporting or not, 302, the associated project 304 and/or sub-project, 304 and 306, respectively, the name of the PAD, 308, the description of the PAD 310, the action implementation event, i.e., the milestone that allows one to know the physical action has been completed, 312, the date  
25 for completion, 314, an assessment of the difficulty of implementation, 316, the status of the implementation, 318, the required approvals, 320, and whether the information is to be recorded against the associated project or another project, 322.

30

The Roadmap(s) for a sub-project, and the PADs associated therewith, are preferably linked to and accessed from the team room, and as shown in FIG. 3, may be co-located within the teamwork tool server 12 and linked via  
35 the bus 34. In fact, the team members define the Roadmap by defining the PADs. The team rooms are preferably linked to



the overall project, and at higher levels within the organization, all of the Roadmaps may be viewed by authorized users. For example, all of the team rooms may be linked under a common web site for the overall project,  
5 while specific team room home pages are created to support the team room environment.

In the example shown in FIG. 15, the physical action description is tied to the years in which financial results  
10 are reported or "booked." Data may also be specified to a particular team or sub-team, or to a particular hierarchy of teams/sub-teams according to the hierarchy of the team room. Data is entered by PAD and by year using a data entry form or worksheet 320 shown in FIG. 18 generated by the data  
15 collection form function 290 of the data collection entity 32. Referring to FIG. 18, the worksheet 320 includes a portion 322 identifying the various PADs by teams.

Associated with each team is a "twistie", one shown as  
20 twistie 324, expands a list 326 of PADs for that team.

Adjacent the PAD in the list is an icon 328 that is used to provide information about the PAD. In the financial example presented, a book icon may represent that the  
25 financial information for the PAD is being booked to a different project than the one particularly identified with the PAD. Additional icons 330, such as a pencil and pad icon or a check mark icon, respectively indicate that the worksheet is in progress or is ready for review. In  
30 addition to the PAD name, 332, the PADs may be identified by a unique identification number 334. As described in this example, data is entered by year, it may also be entered by various other divisions, such as organizational groups 336. The years are identified at 338 and the worksheet totals are  
35 listed at 340. Also listed on the worksheet are the team

members 342 responsible for creating the worksheet and entering the data.

5 The worksheet 320 provides a common format by which all teams associated with the project are required to enter data. The worksheet may include specifications 344 and 346 for the data, and also includes an ability, via the attach files function 292, to attached supporting documentation in the form of electronic files. The worksheet data and the  
10 supporting files are then stored within the data collection entity 32. Once the worksheet 320 is completed and released for review, the control write/delete access function 294 limits all but particularly authorized team members from changing the data.

15

The data summary views function 296 permits authorized team members or guests to view the data associated with the PADs. The data may be view in several report forms, and a report form 350 is illustrated in FIG. 19. The report 350  
20 provides a summary by project team 1-n by organizational group 336. By clicking on one of the project teams, a list expands to present the PADs associated with the selected project team, and the reviewer may further drill down into the data by clicking on twisties, to get to the form 352  
25 illustrated in FIG. 20, where for a particular team, and for a particular PAD, the data by organizational group 336 is shown. The icons 328 are again used to provide information about the data presented, such as the book icon to inform that the data is being booked to a different project.

30

One of ordinary skill in the art will appreciate that the data may be sorted and report in virtually a limitless number of ways. Several examples have been presented herein to illustrate the flexibility of the invention in the  
35 management of the data and in the association of data with the activities of various teams supporting a project. At a

glance of the report, a user may understand a number of characteristics of the data and the teams that generated the data.

5           As previously noted, in the preferred embodiment of the invention, the Roadmaps, and associated PADs, are integrated with the team room concept. The team members therefore define the Roadmaps via that team room, and the team room facilitates entry of information and data into the PADs.  
10 Using the on-line collaboration feature, team members may discuss, comment, and finally integrate and agree on the data represented on the Roadmap.

          It is frequently necessary to share information and  
15 data between separate organizations. For example, where two corporations join together in a joint venture, it may be necessary for respective employees of each corporation to share and collaborate on information and data. In accordance with the preferred embodiments of the invention,  
20 a team room environment is established to support the project.

          The team room may be established within either of the organization's information management systems, e.g., as part  
25 of either organization's Intranet. Security issues, however, may dictate against such an implementation. Alternatively, the team room may be established as part of secure web page environment on the Internet. In such an arrangement the team members would access the team room via  
30 the Internet and following an appropriate security logon to the secure area. The function and features of the team room are preferably as described above, although it will be appreciated that more or less functionality may be provided without departing from the fair scope of the invention.

The preferred embodiments of the invention described herein relate to a web-based tool for providing for the managing of communications, information and facilitating collaboration among team members. The invention may  
5 therefore be implemented using suitable Internet based computer programming techniques, for example, using the Java programming language or HTML programming elements. It may also be advantageous to leverage and utilize existing data management tools, such as "Lotus Domino" (Registered Trade  
10 Mark), and provide thereto the additional functions and capabilities described herein.

The foregoing invention has been described in terms of several preferred embodiments that are intended to be  
15 illustrative of the broad aspects of the invention. One of ordinary skill in the art will appreciate that the invention may be otherwise embodied without departing from the scope of the invention.

**CLAIMS**

1. A method of providing communication and collaboration among team members and non-team members, 5 wherein the team members include first members of a first group of members and the non-team members include second members of a second group of members, organizationally disparate from the first members, the method comprising the steps of providing a teamwork tool server supporting a team 10 room environment, the teamwork tool server being coupled to the first members via a first network structure and to the second members by a second network structure for providing access to the team room environment by each of the team members and the non-team members, providing within the team 15 room environment a first collaboration environment and a second collaboration environment, permitting access by the first members to the first collaboration environment and the second collaboration environment and permitting access by the second members only to the second collaboration 20 environment.

2. A method as claimed in claim 1, wherein the first collaboration environment comprises a team room.

25 3. A method as claimed in claim 1 or in claim 2 wherein the second collaboration environment comprises one of a document room and a chat room.

30 4. A method as claimed in any of claims 1 to 3 wherein the first network structure comprises one of an unsecured network and a secured network.

35 5. A method as claimed in any of claims 1 to 4 wherein the second network structure comprises one of an unsecured network and a secured network.

6. A method as claimed in claim 4 or in claim 5  
wherein the unsecured network is the Internet.

7. A method as claimed in any of claims 4 to 6  
5 wherein the secured network is a local area network.

8. A method of providing communication and  
collaboration among team members and non-team members  
substantially as described herein with reference to the  
10 accompanying drawing.



INVESTOR IN PEOPLE

Application No: GB 0126478.7  
Claims searched: 1 to 8

Examiner: Daniel Voisey  
Date of search: 12 June 2002

### Patents Act 1977 Search Report under Section 17

#### Databases searched:

UK Patent Office collections, including GB, EP, WO & US patent specifications, in:

UK Cl (Ed.T): H4K (KF56, KF42)

Int Cl (Ed.7): H04L 12/00, 12/18, 12/22, 12/28

Other: Online: WPI, EPODOC, JAPIO and the Internet

#### Documents considered to be relevant:

Category	Identity of document and relevant passage	Relevant to claims
X	GB 2313251 A (MOTOROLA) see particularly page 3 lines 1 to 8.	1 at least
X	GB 2299000 A (GEC-MARCONI) see particularly page 1 line 15 to page 2 line 17 and figure 1.	1 at least
X	www.aln.org/alnweb/magazine/vol2_issue2/finkelstein.htm (see particularly page 3 paragraph 3 to page 5 paragraph 2 of the print out.)	1 to 3 at least
X	www.loveecstasy.com/about%20us.htm	1 and 3 at least
X	bookings.bookbe.com/obs/	1 at least

X Document indicating lack of novelty or inventive step

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P Document published on or after the declared priority date but before the filing date of this invention.

E Patent document published on or after, but with priority date earlier than, the filing date of this application.