(51) **International Patent Classification:**
G06F 15/02 (2006.01)   G06F 9/46 (2006.01)

(21) **International Application Number:**
PCT/US2007/018496

(22) **International Filing Date:** 21 August 2007 (21.08.2007)

(25) **Filing Language:** English

(26) **Publication Language:** English

(30) **Priority Data:**
60/839,609   23 August 2006 (23.08.2006)   US
11/541,156   29 September 2006 (29.09.2006)   US

(71) **Applicant** *(for all designated States except US)*: **RENE-GADE SWISH, LLC** [US/US]; 301 Commerce Street, Suite 3200, Fort Worth, Texas 76102 (US).

(72) **Inventor; and**
(75) **Inventor/Applicant** *(for US only)*: **RAYNOR, Geoffrey, Paul** [US/US]; 301 Commerce Street, Suite 3200, Fort Worth, Texas 76102 (US).

(74) **Agents: MUNCK, William, A.** et al.; Munck Butrus, P.C., 900 Three Galleria Tower, 13155 Noel Road, Dallas, Texas 75240 (US).

(81) **Designated States** *(unless otherwise indicated, for every kind of national protection available)*: AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BH, BR, BW, BY, BZ, CA, CH, CN, CO, CR, CU, CZ, DE, DK, DM, DO, DZ, EC, EE, EG, ES, FI, GB, GD, GE, GH, GM, GT, HN, HR, HU, ID, IL, IN, IS, JP, KE, KG, KM, KN, KP, KR, KZ, LA, LC, LK, LR, LS, LT, LU, LY, MA, MD, ME, MG, MK, MN, MW, MX, MY, MZ, NA, NG, NI, NO, NZ, OM, PG, PH, PL, PT, RO, RS, RU, SC, SD, SE, SG, SK, SL, SM, SV, SY, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, ZA, ZM, ZW.

(84) **Designated States** *(unless otherwise indicated, for every kind of regional protection available)*: ARIPO (BW, GH, GM, KE, LS, MW, MZ, NA, SD, SL, SZ, TZ, UG, ZM, ZW), Eurasian (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European (AT, BE, BG, CH, CY, CZ, DE, DK, EE, ES, FI, FR, GB, GR, HU, IE, IS, IT, LT, LU, LV, MC, MT, NL, PL, PT, RO, SE, SI, SK, TR), OAPI (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

Published:
— with international search report
— with amended claims

(88) **Date of publication of the international search report:**
23 October 2008

Date of publication of the amended claims: 11 December 2008

(54) **Title:** APPARATUS, SYSTEM, METHOD AND COMPUTER PROGRAM FOR TASK AND PROCESS MANAGEMENT
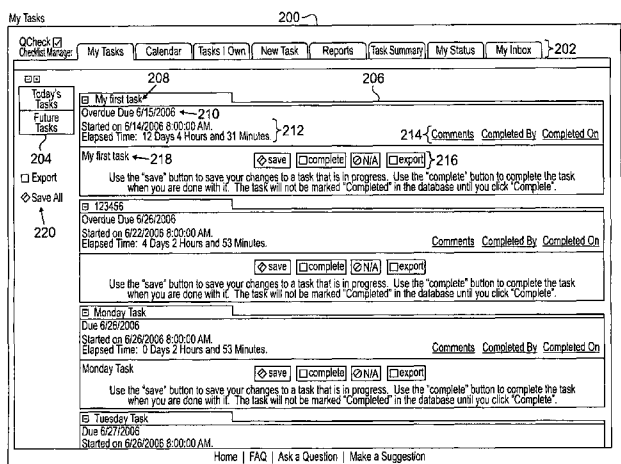

FIG. 2

(57) **Abstract:** This disclosure provides an apparatus (106), system (100), method, and computer program for task and process management. Information identifying multiple steps associated with a task can be stored. First input, from one or more users, may indicate completion of at least one of: the task and each step associated with the task. Second input may represent a dialog between multiple ones of the users. A graphical display (200) for presentation to the one or more users can be generated. The graphical display (200) may identify at least some of the steps associated with the task. The graphical display (200) may also identify a status of at least one of: the task and at least some of the steps associated with the task. The graphical display (200) may further identify at least a portion of the dialog between the multiple users.

AMENDED CLAIMS
[received by the International Bureau on 24 October 2008 (24.10.2008)]

1.   An apparatus, comprising:

at least one memory operable to store information identifying multiple tasks and one or more steps associated

5   with each of the tasks; and

at least one processor operable to:

receive first input from one or more users indicating completion of at least one of: one or more of the tasks and one or more of the steps associated with the

10   tasks;

receive second input comprising dialogs between multiple ones of the users; and

generate a graphical display for presentation to at least one of the users, the graphical display

15   identifying the tasks divided into multiple categories, a completion status of the tasks, and at least a portion of the dialogs between the multiple users, wherein the tasks are categorized based on the completion status of the tasks, and wherein at least the portion of the dialogs

20   between the multiple users presented in the graphical display includes (i) at least a portion of one or more dialogs associated with one or more tasks in each category and (ii) at least a portion of a general dialog not associated with any specific task.

25

2.   The apparatus of Claim 1, wherein at least one of the dialogs comprises:

at least one comment; and

at least one response to the at least one comment.

3.   The apparatus of Claim 1, wherein each task is associated with an input mechanism operable to be selected to present a list of the one or more steps associated with that task.

4.   The apparatus of Claim 1, wherein the at least one processor is further operable to allow at least one of the users to associate at least one of the tasks with a status report, the status report containing the dialog associated with that at least one task.

5.   The apparatus of Claim 4, wherein the at least one processor is further operable to allow at least one of the users to specify which users are allowed to view and modify the status report.

6.   The apparatus of Claim 4, wherein the at least one processor is further operable to allow at least one of the users to email the status report to at least one other of the users.

7.   The apparatus of Claim 4, wherein the at least

one processor is further operable to allow at least one of

the users to specify that the status report is subject to a

confidentiality obligation.

5

8.   The apparatus of Claim 1, wherein the at least

one processor is further operable to allow at least one of

the users to assign at least one of the tasks to at least

one other of the users.

10

9.   The apparatus of Claim 1, wherein the graphical

display generated for presentation to a specific one of the

users comprises:

a list of tasks each having at least one step to be

15   completed by the user;

a calendar identifying the tasks associated with the

user for a selected day or week;

a list of tasks that the user has authority to modify;

and

20   a report identifying the tasks associated with the

user.

10.   The apparatus of Claim 1, wherein the at least

one processor is further operable to allow at least one of

25   the users to define the tasks, wherein definition of each

task comprises definition of:

one or more reminders to be sent to one or more users who are assigned to complete the one or more steps of the task; and

5   one or more alerts to be sent to one or more other users who are not assigned to complete the one or more steps of the task.

11. A method, comprising:

10   receiving first input from one or more users indicating at least one of: completion of at least one of multiple tasks and completion of at least one of one or more steps associated with each of the tasks;

receiving second input comprising dialogs between

15 multiple ones of the users; and

generating a graphical display for presentation to at least one of the users, the graphical display identifying the tasks divided into multiple categories, a completion status of the tasks, and at least a portion of the dialogs

20 between the multiple users, wherein the tasks are categorized based on the completion status of the tasks, and wherein at least the portion of the dialogs between the multiple users presented in the graphical display includes (i) at least a portion of one or more dialogs associated

25 with one or more tasks in each category and (ii) at least a

portion of a general dialog not associated with any specific task.

12.   The method of Claim 11, wherein at least one of the dialogs comprises:

at least one comment; and

at least one response to the at least one comment.

13.   The method of Claim 11, wherein each task is associated with an input mechanism operable to be selected to present a list of the one or more steps associated with that task.

14.   The method of Claim 11, further comprising:

allowing at least one of the users to associate at least one of the tasks with a status report, the status report containing the dialog between the multiple users associated with that at least one task; and

allowing at least one of the users to specify which users are allowed to view and modify the status report.

15.   The method of Claim 14, further comprising indicating that the status report is subject to a confidentiality obligation.

16. The method of Claim 11, wherein the graphical
display generated for presentation to one of the users
comprises:

a list of tasks each having at least one step to be

5   completed by the user;

a calendar identifying the tasks associated with the
user for a selected day or week;

a list of tasks that the user has authority to modify;
and

10   a report identifying the tasks associated with the
user.

17. A computer program embodied on a computer
readable medium, the computer program comprising:

15   computer readable program code for receiving first
input from one or more users indicating at least one of:
completion of at least one of multiple tasks and completion
of at least one of one or more steps associated with each
of the tasks;

20   computer readable program code for receiving second
input comprising dialogs between multiple ones of the
users; and

computer readable program code for generating a
graphical display for presentation to at least one of the

25   users, the graphical display identifying the tasks divided

into multiple categories, a completion status of the tasks, and at least a portion of the dialogs between the multiple users, wherein the tasks are categorized based on the completion status of the tasks, and wherein at least the

5   portion of the dialogs between the multiple users presented in the graphical display includes (i) at least a portion of one or more dialogs associated with one or more tasks in each category and (ii) at least a portion of a general dialog not associated with any specific task.

10

18.   The computer program of Claim 17, wherein at least one of the dialogs comprises:

at least one comment; and

at least one response to the at least one comment.

15

19.   The computer program of Claim 17, wherein each task is associated with an input mechanism operable to be selected to present a list of the one or more steps associated with the task.

20

20.   The computer program of Claim 17, further comprising:

computer readable program code for allowing at least one of the users to associate at least one of the tasks

25   with a status report, the status report containing the

dialog between the multiple users associated with that at least one task; and

computer readable program code for allowing at least one of the users to specify which users are allowed to view
5   and modify the status report.

21. The computer program of Claim 20, further comprising computer readable program code for indicating that the status report is subject to a confidentiality
10 obligation.

22. A system, comprising:

a database operable to store information identifying multiple tasks and one or more steps associated with each
15 of the tasks;

a server operable to:

receive first input from one or more users indicating completion of at least one of: one or more of the tasks and one or more of the steps associated with the
20 tasks;

receive second input comprising dialogs between multiple ones of the users; and

generate a graphical display for presentation to at least one of the users, the graphical display
25 identifying the tasks divided into multiple categories, a

completion status of the tasks, and at least a portion of the dialogs between the multiple users, wherein the tasks are categorized based on the completion status of the tasks, and wherein at least the portion of the dialogs

5   between the multiple users presented in the graphical display includes (i) at least a portion of one or more dialogs associated with one or more tasks in each category and (ii) at least a portion of a general dialog not associated with any specific task; and

10   at least one user device operable to display the graphical display.