

(19) World Intellectual Property Organization
International Bureau



(43) International Publication Date
22 February 2007 (22.02.2007)

PCT

(10) International Publication Number
WO 2007/021329 A3

- (51) International Patent Classification:
G05B 19/418 (2006.01)
- (21) International Application Number:
PCT/US2006/015037
- (22) International Filing Date: 20 April 2006 (20.04.2006)
- (25) Filing Language: English
- (26) Publication Language: English
- (30) Priority Data:
60/706,561 9 August 2005 (09.08.2005) US
11/277,125 21 March 2006 (21.03.2006) US
- (71) Applicant (for all designated States except US): **TELEPHONY@WORK** [US/US]; 4225 Executive Square, Suite 600, La Jolla, California 92037 (US).

3825 Kendall Street, San Diego, California 92109 (US). **YAHMADI, Imed** [CA/US]; 4072 Ashford Street, San Diego, California 92111 (US). **MARGULIES, Edwin** [US/US]; 9811 West Charleston Blvd., Suite 2-260, Las Vegas, Nevada 89117 (US).

- (72) Inventors; and
- (75) Inventors/Applicants (for US only): **BORODOW, Eli** [CA/US]; 3535 Lebon Drive, Unit 2401, San Diego, California 92122 (US). **EZERZER, Ran** [CA/US]; 531 Front Street, San Diego, California 92101 (US). **AL-JANE, Ali** [CA/US]; 7699 Palmilla Drive, San Diego, California 92122 (US). **SEEBAUER, William** [US/US];

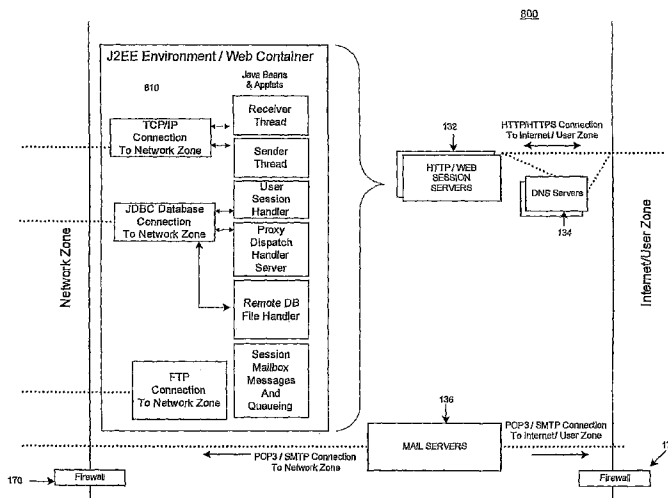
(74) Agents: **CODDINGTON, Trevor** et al.; PAU, HASTINGS, JANOFFSKY & WALKER, LLP, P.O. Box 919092, San Diego, California 92191-9092 (US).

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

[Continued on next page]

(54) Title: UNIVERSAL WORKFLOW-BASED ROUTING



(57) Abstract: The present invention facilitates the creation and implementation of Workflow Templates and also the designation of linkage between these templates and specific projects dealing with different media type handling. Workflow Templates are used to automatically generate user interface views which will be used by agents, knowledge workers, supervisors and customers. Such Workflow Templates provide the means to create, define and store the name and definition of and "trigger points" for each workflow item. The trigger points for when a document is used are also determined when creating the template. Further, in creating a Workflow Templates the administrator can instruct the system to save scripts associated with the template that can be saved as XML, EDI, JSP, CGI, VXML, etc. so as to be able to automatically generate documents or logic flows consistent with the target media type for the anticipated interactions with customers.

WO 2007/021329 A3



RO, SE, SI, SK, TR), OAPI (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

(88) Date of publication of the international search report:
11 October 2007

Published:

- with international search report
- before the expiration of the time limit for amending the claims and to be republished in the event of receipt of amendments

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

INTERNATIONAL SEARCH REPORT

International application No.
PCT/US 06/15037

A. CLASSIFICATION OF SUBJECT MATTER
IPC(8): G05B 19/418 (2007.01)
USPC: 705/8
According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)
USPC: 705/8

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched
USPC: 700/90, 91, 705/1, 7, 9 (text search, see terms below)

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
PubWEST(PGPB,USPT,EPAB,JPAB);
Search Terms: Automatic, interactive, dynamic, document, form, template, customer, client, caller

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 5,557,515 A (ABRUZZESE et al.) 17 September 1996 (17.09.1996), col 13, ln 7 to col 19, ln 37, col 29, ln 18 to col 30, ln 20, col 41, ln 42-59, col 45, ln 34 to col 50, col 67, ln 60 to col 68, ln 45, ln 6, col 81, ln 28-34, col 89, ln 38 to col 90, ln 51, col 134, ln 58 to col 135, ln 2	1-29
A	US 2003/0101082 A1 (VOLPE et al.) 29 May 2003 (29.05.2003), entire document	1-29

Further documents are listed in the continuation of Box C.

* Special categories of cited documents:
 "A" document defining the general state of the art which is not considered to be of particular relevance
 "E" earlier application or patent but published on or after the international filing date
 "L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)
 "O" document referring to an oral disclosure, use, exhibition or other means
 "P" document published prior to the international filing date but later than the priority date claimed
 "T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention
 "X" document of particular relevance: the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone
 "Y" document of particular relevance: the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art
 "&" document member of the same patent family

Date of the actual completion of the international search
30 May 2007 (30.05.2007)

Date of mailing of the international search report
16 AUG 2007

Name and mailing address of the ISA/US
Mail Stop PCT, Attn: ISA/US, Commissioner for Patents
P.O. Box 1450, Alexandria, Virginia 22313-1450
Facsimile No. 571-273-3201

Authorized officer:
Lee W. Young
PCT Helpdesk: 571-272-4300
PCT OSP: 571-272-7774

for
SBurman