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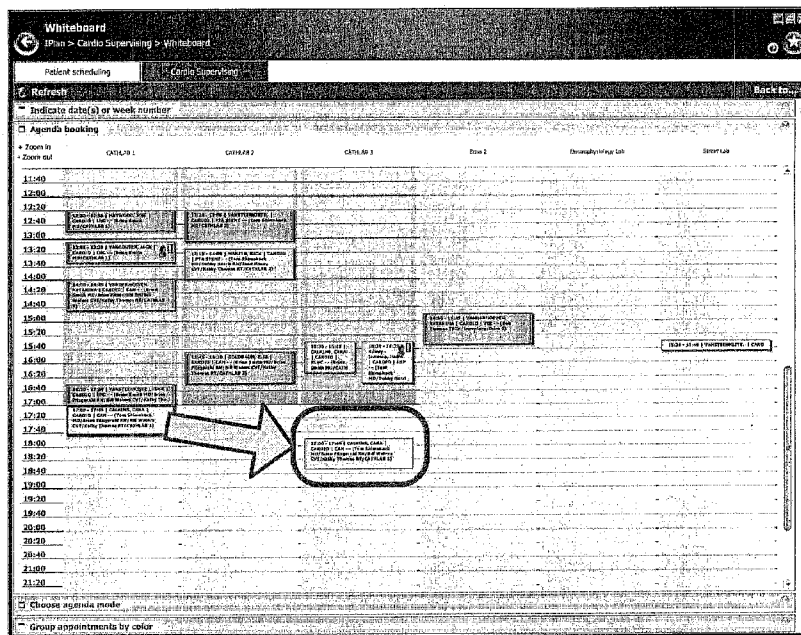
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Published:  
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(54) Title: ELECTRONIC WHITEBOARD FOR APPOINTMENT MANAGEMENT



(57) Abstract: A system for managing appointments wherein appointments can be scheduled, rescheduled, deleted etc. by drag and drop actions on an electronic whiteboard.

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Electronic whiteboard for appointment management.

**[DESCRIPTION]**

5

## FIELD OF THE INVENTION

The present invention relates to an appointment scheduling system. More specifically the invention relates to a system for managing  
10 appointment schedules on an electronic whiteboard.

## BACKGROUND OF THE INVENTION

15 A virtual or electronic whiteboard that displays an integrated view of patient data, derived from an electronic scheduling system, and room status information has been described in an article by David A Berkowicz M.D., G. Octo Barnett M.D. and Henry C. Chueh M.D. of Laboratory of Computer Science, Massachusetts General Hospital,  
20 Boston, MA, entitled: eWhiteboard: A real Time Clinical Scheduler.

User interface systems for scheduling applications are known that are similar to electronic calendars. An example of such a system is the scheduling system marketed under the trade name CARDIOSCHEDULE  
25 by LUMEDX Corporation.

These systems however do not allow direct appointment management on the user interface.

It is an aspect of the present invention to provide a system for  
30 direct appointment management such as scheduling, rescheduling, deleting etc. in an agenda overview spanning several resources (such as people, rooms, material).

35 SUMMARY OF THE INVENTION

- 2 -

The above-mentioned aspects are realized by a system for managing appointment schedules having the specific features set out in claim 1.

5 The system comprises

- means for displaying in the form of an electronic whiteboard an overview table comprising available and unavailable time slots for each of a number of resources (e.g. cathlabs, echo rooms...) involved in an application (e.g. cardiology) subject of supervision,

10 - means for displaying at least one scheduled appointment on a position on this overview that is linked to a particular time slot and a particular resource,

- means for dragging and dropping a displayed appointment on the electronic whiteboard,

15 - means for blocking un-available time slots so that the displayed scheduled appointments can be dragged to and dropped on a time slot that is available for a particular resource but cannot be dropped on a time slot where a particular resource is unavailable.

20 The means for blocking un-available time slots provide visual blocking of the draggable panel over columns of the table that are unavailable. The data from which this can be deduced are available on a client computer.

25 Preferably the available and unavailable time slots are displayed in a distinct manner such as in a distinct colour.

A scheduling engine is arranged so that, as a box relating to an appointment is dragged to and dropped on a new location on the  
30 electronic whiteboard corresponding with at least one of an alternative time period and an alternative resource for the appointment, the alternative data are transferred to the scheduling engine to check whether planning constraints are met at the position where the appointment is dropped, and wherein an appointment is  
35 rescheduled when all constraints are met.

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Further advantages and embodiments of the present invention will become apparent from the following description and drawings.

#### BRIEF DESCRIPTION OF THE DRAWINGS

5

Fig. 1 shows an example of a whiteboard system for supervising a cardiology planning according to the present invention,  
Fig. 2 illustrates the default (un)availabilities in a system for supervising a cardiology planning provided with a timeline  
10 indicating the actual point of time of the day,  
Fig. 3 illustrates re-scheduling an appointment,  
Fig. 4 shows the other resources involved in an appointment besides the visible agendas of the resources,  
Fig. 5 illustrates how to monitor and modify appointment statuses.

15

#### DETAILED DESCRIPTION OF THE INVENTION

By means of a system according to the present invention direct  
20 appointment management can be performed in an agenda overview, i.e. an electronic whiteboard, spanning several resources (people, rooms, materials). The agenda overview or electronic whiteboard can be displayed on any VGA, DVI or HDI compatible hardware.

25

Figure 1 is a screen print showing an example of a whiteboard system for a cardiologic department. For such a department the resources that are represented on the whiteboard are typically 'rooms' such as Cathlabs, echo room, laboratory (lab) etc.

30

However, it is also possible to represent other resources such as the physicians that are involved in cardiologic examination.  
The electronic whiteboard is managed by a whiteboard supervisor.

35

On such an electronic whiteboard the available and non-available time slots for each of the resources (the rooms) involved in a particular department (in this example: the cardiology department) are displayed.

- 4 -

The available/non-available time slots of these resources are retrieved from lists that are composed in advance. These lists are generated by a scheduling engine running on a server computer. The lists are initially fed with data regarding the availability and non-availability of the rooms that are involved in cardiology.  
5 Rooms may for example be non-available due to maintenance.

Resources and time slots are for example arranged in a matrix configuration wherein columns correspond with different resources  
10 and rows correspond with time slots.

It is preferable that the available and unavailable periods of time for each of the resources that are part of the cardiology application are displayed in a distinct manner such as different  
15 colors, different type of hatching or shading etc. so that the user can immediately visually discriminate between periods of time that are/are not available for scheduling an appointment in a certain cardiology room.

On the whiteboard of the illustrated embodiment, the availability  
20 and non-availability of the resources is indicated by means of light (originally red) and dark (originally green) background area.

In the described embodiment, the whiteboard is presented by default with the right pane available.

25 When selecting an appointment, the details are shown on this right pane.

The user then has the current options to manage the appointment (delete, reschedule, print).

30 In the embodiment shown, today's date is shown by default on the whiteboard. By means of the calendar expander, the supervisor can modify the day shown on the whiteboard overview.

It is possible to have a timeline indicating the current moment on the whiteboard as is shown in figure 2 (horizontal line at a  
35 specific point on the time axis).

- 5 -

Add a new appointment:

Appointments involving one of the resources shown on top of the whiteboard can be scheduled on the electronic whiteboard.

5

To add a new appointment the supervisor clicks somewhere on the whiteboard. At that moment, an action 'Create an appointment' becomes available. This action is displayed on a link panel of the scheduling application.

10

When selecting that action, it is possible to select a procedure from a filtered list, only related to the selected resource. Through a manual booking screen, it's still possible to drag and drop a box relating to this appointment.

15

When the appointment is confirmed, by 'dropping' the box and clicking on a link 'confirm appointment', the supervisor is brought back to the whiteboard overview and the new appointment is added.

20

When an appointment is being scheduled, the data regarding this appointment (time, resource, patient related constraints ...) are retrieved by the scheduling engine and the scheduling engine computes whether all criteria for this appointment are met. The scheduling engine checks in addition to the availability of the resource displayed on the whiteboard, also the availability of all other, hidden resources that are involved in the appointment (such as availability of a certain physician for a specific examination) and checks whether the constraints involved in the examination are met. These constraints typically are patient related constraints such as whether a prescribed amount of time has passed between two successive examinations of the patient.

30

If all necessary resources are available and all constraints are met, the appointment can be made. The appointment is shown in the form of a small box comprising i.a. identification data of the patient on the electronic whiteboard at a location corresponding with the period of time of the appointment and in the column

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pertaining to the room involved in the appointment. The data lists associated with the scheduling system in which the available time slots for each of the resources are stored, are updated with the new information regarding the time slots(s) occupied by the scheduled  
5 appointment.

Rescheduling an appointment:

The supervisor can reschedule an appointment on means of the  
10 electronic whiteboard by drag and drop of (a box regarding) a selected appointment.

In accordance with this invention the system is arranged so that the box relating to an appointment cannot be dragged towards resources  
15 that, according to the definition, are not part of the procedure.

For example, as soon as a procedure within a Cathlab is selected, only the availabilities of each Cathlab are shown in dark colour (originally green colour), the columns pertaining to other resources  
20 become light coloured (originally red) (see figure 3).

In case a cathlab is not available (e.g. due to maintenance), it will also be shown partially in light color (originally red).

The supervisor can drag a box relating to an appointment throughout  
25 the area relating to the cathlabs, but when trying to drag and drop outside the area on the whiteboard pertaining to cathlabs, this will not be possible and the box relating to the appointment will jump back to its original location.

30 As soon as a box relating to an appointment is dropped, the scheduling engine calculates whether planning constraints regarding this new location (which corresponds to a new period of time) are met.

35 Planning constraints are multiple and different in nature. Typical natures include:

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time : availability all involved resources, including the patient  
procedure attributes : limits on patient age, gender, combination  
with other procedures

amount : maximum per day or per resource or combinations

5

If all constraints are met, a message 'Appointment has been  
rescheduled' is generated in the described embodiment and again, the  
data lists regarding the availabilities (time slots) of each of the  
resources are updated with the new information.

10

If constraints are broken, this is indicated through a message and  
list of broken constraints is given.

15

If the supervisor has forcing rights for the selected procedure,  
he/she has the possibility to force the appointment.

20

The conceived whiteboard and underlying scheduling engine handles  
more than just the visible agenda's of the resources. It handles  
all of the resource involved with the appointment including the  
hidden resources involved in an appointment.

25

In case other resources besides the resource present on the  
whiteboard are involved in the appointment, they can be managed  
through a right mouse click on the appointment box. A right mouse  
click will generate display of a small menu comprising a list of the  
other involved resource groups.

When selecting a resource group, a possibly involved resource is  
marked with a "V".

Other resources can be selected by clicking upon.

30

At that moment, the scheduling engine checks the availability of  
that resource and may notify the supervisor of any broken  
constraints (see above).

35

A procedure can be added to existing appointments by clicking on the  
action 'Add procedure to the selected appointment'.



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It is then possible to select a procedure from a filtered list, only related to the resources of the existing appointment.

The lists are stored in a database and the setup of the application determines which resources can perform a certain examination.

5 The list are filtered by evaluating of all resources are available for an examination.

It is possible to modify the duration of the procedure.

When the procedure is added, appointment status of this procedure  
10 (see below) behaves as the existing procedure.

It is also possible to add a new appointment as described higher.

Finally, it's also possible to monitor and modify appointment  
15 statuses (see figure 5).

In a pane 'Group appointments by color', it is possible to select the 'procedure status' radiobutton. At that moment, a legend of statuses and related color (or density, hatching or the like) is shown. The procedural statuses are stored in a database and the link  
20 between a status an a certain colour is stored in an XML file.

This helps to know the exact meaning of every color (density, hatching or the like) on the appointment.

The supervisor can modify a status by selecting an appointment. At  
25 that moment, in the action box, the possible 'next statuses' become available. When selecting one of the actions, the status is changed.

The status colors can be configured to indicate ongoing or emergency  
30 appointments. For example, 'emergency' status appointments can be assigned a bright red color in the setup.

Finally, it's also possible to print out the agenda's of the  
resources on the whiteboard. Agenda's are printed out sequentially.

35

Scheduling engine:

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An example of scheduling engine that may be used for determining the available/non-available time slots of the resources involved in a type of examination has been described in the published PCT

5 application WO2006/094890. The described scheduling engine computes for each resource a set of available/non-available time slots.

An inductive logic method is employed to control the processing of time slots.

10 First relationships between actions (appointment, exam, dressing, undressing etc.) of resources are defined. These relationships are for example comprising, relational or sequential relationships. A first set of resources of which action constraints are known and a second set of resources for which action constraints are unknown are identified.

15 Next, the actions of the resources of the first and second set of resources are described by means of time windows (belonging to the set of action, start time of an action or end time of an action) comprising a linked list of time segments.

20 Then a resource out of the second set is identified and the time windows are processed to determine the action of the identified resource. This processing comprises at least one inductive processing step.

The inductive logic step generally comprises one of the following - obtaining a time window of start times of an action by processing a time window of end times of said action and a time window of a previous action.

25 - obtaining a time window of end times of an action by processing a time window of said action, a time window of a following action and a slack time,  
30 - obtaining a time window of an action by processing the time windows of actions that are either a parent action or related actions.

- 10 -

The inductive step of obtaining a time window of start times of an action by processing a time window of end times of the action and a time window of a previous action may comprise the following steps:

- adding the duration of the previous action to the start times of the time segments of the time window of the previous action to obtain a time window of the end times of the previous action;
- shifting the time segments of the time window of the end times of the action backward by the duration of the action to obtain a time window of the start times of the action;
- obtaining a time window of the start times of the action of which the segments are the cross section of the segments of the time window of the end times of the previous action and the segments of the time window of the start times of said action.

The inductive step of obtaining a time window of end times of an action by processing a time window of the action, a time window of a following action and a slack time may comprise the following steps:

- subtracting the duration from the end times of the time segments of the time window of the following action to obtain a time window of start times of the following action;
- adding the slack time to the end times of the time segments of the time window of the action to obtain a time window of the action plus slack;
- adding the duration to the start times of the time segments of the time window of the action plus slack to obtain a time window of end times of the action;
- obtaining a time window of end times of the action of which the time segments are the cross section of the time segments of a time window of start times of the following action and the time segments of a time window of end times of the action.

The inductive step of obtaining a time window of an action by processing the time windows of actions that are either a parent action or related actions may comprise the following steps:

- replacing the time segments of time windows of related actions by time segments that are the cross sections of the original time segments of the time windows of the related actions;

- 11 -

- adjusting the begin and end times of time segments of children actions so that are comprised in the time segments of the time window of the parent action.

- 5 Having described in detail preferred embodiments of the current invention, it will now be apparent to those skilled in the art that numerous modifications can be made therein without departing from the scope of the invention as defined in the appending claims.

■

**[CLAIMS]**

1. A system for managing appointment schedules comprising

5

- means for displaying in the form of an electronic whiteboard an overview table comprising available and unavailable time slots for each of a number of resources (e.g. cathlabs, echo rooms...) involved in an application (e.g. cardiology) subject of supervision,

10

- means for displaying at least one scheduled appointment on a position on this overview that is linked to a particular time slot and a particular resource,

- means for dragging and dropping a displayed appointment on the electronic whiteboard,

15

- means for blocking un-available time slots so that the displayed scheduled appointments can be dragged to and dropped on a time slot that is available for a particular resource but cannot be dropped on a time slot where a particular resource is unavailable.

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2. A system according to claim 1 wherein said available and unavailable time slots are displayed in a distinct manner.

3. A system according to claim 1 wherein said different manner is a different colour.

25

4. A system according to claim 1 comprising a scheduling engine arranged so that as a box relating to an appointment is dragged to and dropped on a new location on the electronic whiteboard corresponding with at least one of an alternative time period and an alternative resource for the appointment, the alternative data are

30 retrieved by the scheduling engine to check whether planning constraints are met at the position where the appointment is dropped, and wherein an appointment is rescheduled when all constraints are met.

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5. A system according to claim 4 comprising means for generating a message indicating that an appointment is re-scheduled or indicating that not all constraints are met.

5 6. A system according to claim 1 arranged so that upon an user interaction (RMC) a list of originally hidden resources involved in an appointment is displayed and can be managed.

10 7. A system according to claim 1 arranged so that upon user interaction a procedure can be added to an appointment.

■

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**Whiteboard**  
 IPan > Cardilo Supervising > Whiteboard

Patient scheduling  
 Cardilo Supervising

**Refresh**

Indicate date(s) or week number  
 Agenda booking

Zoom in  
 Zoom out

	CATHLAB 1	CATHLAB 2	CATHLAB 3	Edo 2	Electrophysiology Lab	Stress Lab
11:20						
11:40						
12:00						
12:20						
12:40	12:30-13:00   VAN DER WOUDE, M.   (From Cathlab 1)					
13:00	13:00-13:30   VAN DER WOUDE, M.   (From Cathlab 1)					
13:20	13:15-13:45   MARTIN, R.   (From Cathlab 1)					
13:40	13:35-14:05   MARTIN, R.   (From Cathlab 1)					
14:00	13:50-14:20   VAN DER WOUDE, M.   (From Cathlab 1)					
14:20	14:10-14:40   VAN DER WOUDE, M.   (From Cathlab 1)					
14:40	14:30-15:00   VAN DER WOUDE, M.   (From Cathlab 1)					
15:00						
15:20						
15:40						
16:00						
16:20						
16:40						
17:00	16:50-17:20   VAN DER WOUDE, M.   (From Cathlab 1)					
17:20	17:10-17:40   VAN DER WOUDE, M.   (From Cathlab 1)					
17:40	17:30-18:00   VAN DER WOUDE, M.   (From Cathlab 1)					
18:00						
18:20						
18:40						
19:00						
19:20						
19:40						
20:00						
20:20						
20:40						
21:00						
21:20						

Choose agenda mode  
 Group appointments by color

Fig. 1

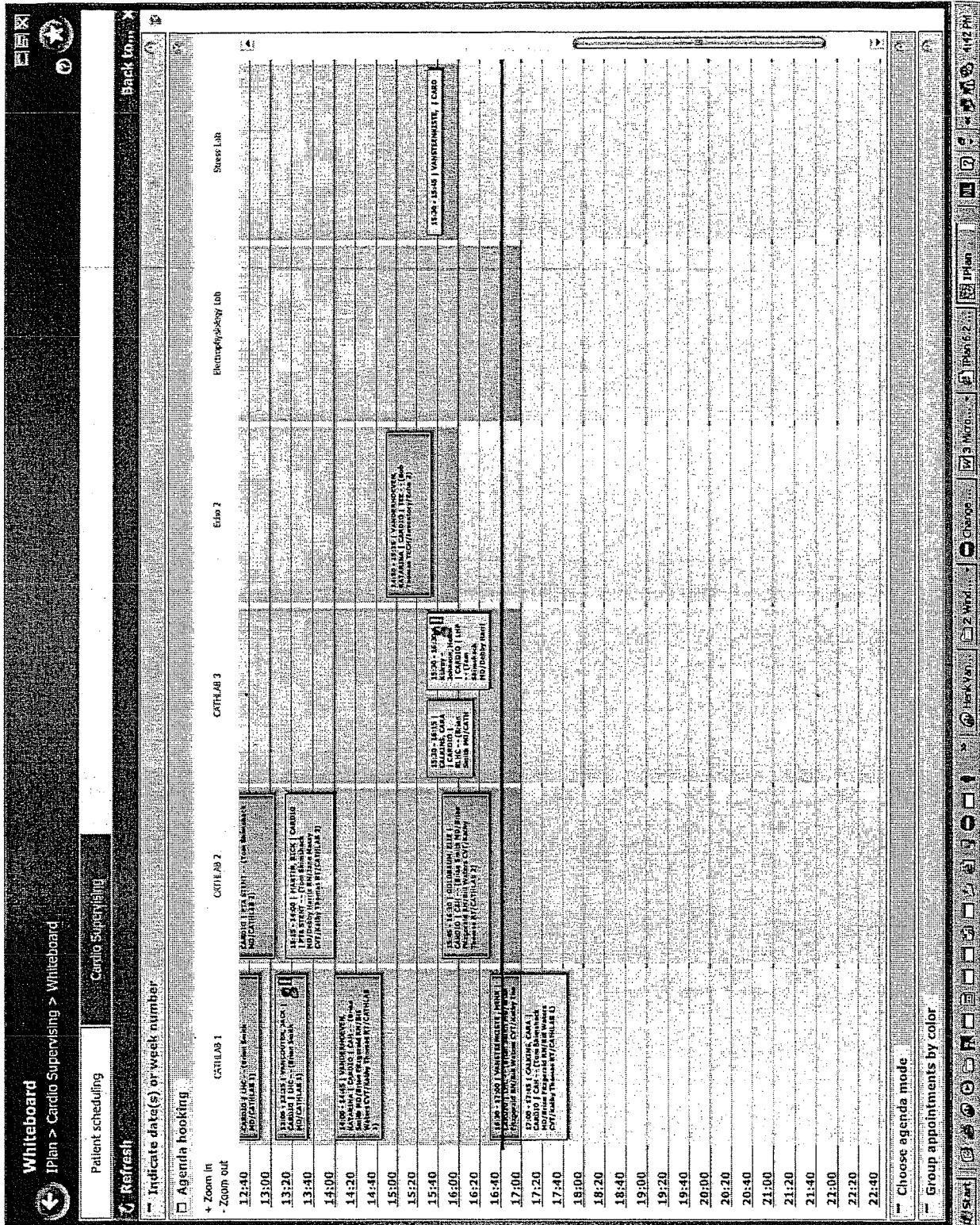


FIG. 2



**Whiteboard**  
 IPlan > Cardio Supervising > Whiteboard  
 Patient scheduling Cardio Supervising

**Refresh** **Back to...**

Indicate date(s) or week number  
 Agenda booking

Zoom In / Zoom out

Time	CAT10-91.1	CAT10-91.2	CAT10-91.3	Edin 2	Electrophysiology Lab	Edin 1 Lab
11:00						
12:00						
12:20						
12:40						
13:00						
13:20						
13:40						
14:00						
14:20						
14:40						
15:00						
15:20						
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19:20						
19:40						
20:00						
20:20						
20:40						
21:00						
21:20						

Choose agenda mode  
 Group appointments by color

Fig. 3

Agenda

Items » Korsta Sisestoitaja » Agenda

Refresh

Indicate display or week number

Agenda description

2008-04-04 2008-04-04

Time	Event	Room
11:15		
11:30		
11:45		
12:00		
12:15		
12:30		
12:45		
13:00		
13:15		
13:30		
13:45		
14:00		
14:15		
14:30		
14:45		
15:00		
15:15		
15:30		
15:45		
16:00		
16:15		
16:30		
16:45		
17:00		
17:15		
17:30		
17:45		
18:00		
18:15		
18:30		
18:45		
19:00		

Choose agenda mode

Group appointments by color

Fig. 4

**Agenda**  
IP.com > Exhibit Scheduling > Agenda

Start/End: 15:45 - 16:30 (15:45 - 16:30)  
02 October 2006

Back to...  
Collapse All

Agenda by week number  
Agenda by topic

Start/End	Topic	Chair	Host/Co-organizer	Room
13:30-14:00	13:30-14:00: Scheduling of the 2006 Annual Meeting			
14:00-14:15	14:00-14:15: Welcome and Registration			
14:15-14:30	14:15-14:30: Opening Remarks			
14:30-14:45	14:30-14:45: Keynote Address			
14:45-15:00	14:45-15:00: Session 1			
15:00-15:15	15:00-15:15: Session 2			
15:15-15:30	15:15-15:30: Session 3			
15:30-15:45	15:30-15:45: Session 4			
15:45-16:00	15:45-16:00: Session 5			
16:00-16:15	16:00-16:15: Session 6			
16:15-16:30	16:15-16:30: Session 7			
16:30-16:45	16:30-16:45: Session 8			
16:45-17:00	16:45-17:00: Session 9			
17:00-17:15	17:00-17:15: Session 10			
17:15-17:30	17:15-17:30: Session 11			
17:30-17:45	17:30-17:45: Session 12			
17:45-18:00	17:45-18:00: Session 13			
18:00-18:15	18:00-18:15: Session 14			
18:15-18:30	18:15-18:30: Session 15			
18:30-18:45	18:30-18:45: Session 16			

**Choose agenda mode:**  
 Group appointments by color  
 Equipment and location code  
 Procedure group  
 Department  
 PPT/AV  
 Abstract topic  
 Funding  
 Resource demand  
 Processing status

**On waiting list:**  
 Excluded from meeting  
 Pending  
 Place

**Other:**  
 Asterisk not added  
 Filter applied

**Who is attending your session?**  
 Set appointments as published session  
 Set appointments as published agenda

**Attendee List:**  
Name  
Company  
Country  
Phone  
Email  
Status

**Session Details:**  
Topic  
Chair  
Host/Co-organizer  
Room  
Start/End  
Status

FIG. 5

**INTERNATIONAL SEARCH REPORT**

International application No  
PCT/EP2007/060184

**A. CLASSIFICATION OF SUBJECT MATTER**  
INV. G06Q10/00

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)  
G06Q G06F

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practical, search terms used)

EPO-Internal

**C. DOCUMENTS CONSIDERED TO BE RELEVANT**

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 7 010 395 B1 (GOLDBERG ALLAN MORRIS [US] ET AL) 7 March 2006 (2006-03-07) column 6, line 5 - line 32; figure 6 -----	1-7
X	JP 2002 063004 A (RICOH KK) 28 February 2002 (2002-02-28) abstract -----	1-7
X	US 2006/149589 A1 (WAGER DOUGLAS W [US]) 6 July 2006 (2006-07-06) abstract -----	1-7
	----- -/--	

Further documents are listed in the continuation of Box C.

See patent family annex.

\* 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 document 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

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- \*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.
- \*Z\* document member of the same patent family

Date of the actual completion of the international search

22 November 2007

Date of mailing of the international search report

04/12/2007

Name and mailing address of the ISA/

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Fax: (+31-70) 340-3016

Authorized officer

Beatty, John

## INTERNATIONAL SEARCH REPORT

International application No  
PCT/EP2007/060184

C(Continuation). DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	BERKOWICZ, D. A., G. O. BARNETT AND CHUEH, H.C.: "eWhiteBoard: A real time clinical scheduler" PROCEEDINGS OF AMERICAN MEDICAL INFORMATICS ASSOCIATION (AMIA) 1999 ANNUAL SYMPOSIUM, 1999, XP007903577 Washington D.C. the whole document	1-7
A	WO 98/14888 A (MICROTOUCH SYSTEMS INC [US]) 9 April 1998 (1998-04-09) abstract	1-7

# INTERNATIONAL SEARCH REPORT

Information on patent family members

International application No PCT/EP2007/060184
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Patent document cited in search report	Publication date	Patent family member(s)	Publication date	
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