In various embodiments the controller is able to communicate with the CRM and/or video service using code and endpoints defined by the APIs of these services.

The reader will appreciate that documents, data or videos stored by a 5 relationship manager or CRM may be stored using a storage service, or other storage, and accessible to the CRM. For example, in some embodiments the relationship manager may store a link to documents, data or videos. The relationship manager of some embodiments stores the data, documents or video with associations to various of the 10 following: enterprise, host, participants, online meeting and video session.

Figure 9 shows a system 101 according to one embodiment of the present invention for an online meeting between a host device 102 and a participant device 103 in which the meeting is facilitated by an online meeting transaction server 104. The system of Figure 9 allows a form to be filled in collaboratively and executed in the online meeting under the control of an operator of the host device 102. The form may be stored as evidence of as evidence of a transaction made in the online meeting involving data entered in the form.

According to the embodiment of Figure 9 the host and participant devices 102 and 103 each have a user interface 105. The user interface 105 has a video interface 106 for connection with the other device through a video service 107. The user interface 105 also has a form interface 108 which displays a document or form 109 to be completed and signed in the online meeting as evidence a transaction made during the online meeting or in an online meeting room between operators of the devices 102 and 103.

The server 104 has a store 115 of form templates 110 which can be selected by inputs at the user interface 105 of the host device 104. The form interface 108 is able to render the form 109 from the template 110 downloaded to the device 102 or 103 from the server 104. The interface 105 of the participant device also uses configuration data 111 to render the form 109. The configuration data 111 is determined by inputs at the interface 105 at the host device 2, received at the server 104 and sent to the participant device 109. The operator of the host device 102 is able to control how the form is displayed or, in other embodiments, how the user interface 106 appears by determining or adjusting the configuration data 111. In this example, which fields of the form that are visible at any given time are determined by the configuration

data. In this example also, various options which will be apparent to the reader for interaction with or display by the user interface 105 are also set as active or inactive by the configuration data 111.

In the embodiment shown in Figure 9 moderation status data 113 controls which of the devices 102 or 103 has the authority to enter data into the device at a given time. In this embodiment also, the moderation status data 113 is determined by inputs at the user interface 105 of the host device. This provides the operator of the host device with further control of the online meeting. In one example, the moderation right, or moderator status, can be swapped between the two devices dependent under the control of the host device by inputs received at the user interface of the host device causing commands to swap the moderator status to be selected from the library and sent to the server.

Figure 9 shows form data 112 stored at the host device 102, participant device 103 and server 104. Form data 112 entered into fields of the form 109 is stored locally at devices 102 or 103 for use in displaying the form 109 and is uploaded to the server 104 which downloads that form data to the other device 103 or 102 in the meeting. By this means the interfaces 105 of each device 102 or 103 show the current status of the form being filled.

Session data 114 held by the server 104 for a given online meeting session is downloaded to the devices 102 and 103 to authorise access to a session. In this embodiment the session data is associated with form data 112 entered in a session.

In the embodiment shown in Figure 9 the server is operable to receive and send commands to and from the devices 102 and 103 to facilitate the meeting, update displays at the devices and data held at the devices and to allow the operator of the host device 102 to invite participants, control the meeting and cause the server to store form data. The commands are selected from a library of commands 17 held at each of the devices 102 or 103 and the server 104. The exchange of these commands between the server and the two devices in the online meeting allow initiation of an online meeting, selection of the participant, invitation of the participant and control of the online meeting in which the form is filled in and signed, and then initiates evidential storage of the form as a record of a transaction made in the meeting.

Figure 9 also shows the server 104 in communication with a relationship database 118 which stores relationship data 134 which associates the host device or operators of host devices with an enterprise. The relationship data also associates operators which may be invited to participate using various candidate participant devices in a meeting with one of the host operators. In this embodiment the relationship database 118 stores data associating a number of candidate host devices 102, operators of host devices, or hosts, with the enterprise. The relationship database 118 of this embodiment also stores data defining associations between a number of candidate participants, for online meetings with the hosts associated with the enterprise. These candidate participants can be invited to an online meeting by the server 104 upon receiving a request from a host device 102. Additionally, in the embodiment of Figure 1, the relationship database stores address data, such as 130 and 131, and other data understood by the reader as required by the server 104 to generate an invite for an operator of a participant device to use to join the device 103 to an online meeting, typically, initiated by the server upon receiving a request from the host device 102. Data stored by the relationship database may also allow the server to associate a given host with a given enterprise. The server 104 of this embodiment allows host 102 devices 102, or operators of host devices, to initiate online meetings with participant devices 103 associated with the same enterprise. The server similarly allows participants to be invited to a meeting facilitated by the server.

The server has access to stored evidencing rules 119 which determine operations to be performed by the server at the request by the host, for example, that the form data be stored as evidence of a transaction made between operators of devices 102 and 103 in an on-line meeting. In this embodiment the server is able to receive commands from a number of host devices associated with a number of enterprises. The server of this embodiment is able to retrieve a set of rules 119 stored for each enterprise. The set of rules in this embodiment are associated with each host. In this embodiment also a stored association between the host and an enterprise and a set of rules defined for each enterprise allows the retrieval of a set of rules for the given host. Data from the relationship database 118 allows the server to retrieve the rules defined for the appropriate enterprise by associating the host with which the server is communicating with an enterprise.

In this embodiment an interface (not shown) is provided to allow evidencing rules to be received as inputs to a user interface or as a file or code. In this

embodiment also, a rules interface allows the rules to be displayed and or/ updated.

In the embodiment shown in Figure 9, a document generator 121 is operable to generate a document containing form data entered at the form interfaces 108 of the devices 102 and 103 and signature data entered, typically but not necessarily, only at the participant device 103 In this embodiment the signature data is captured as a set of coordinates of a pen, finger or pointing device of an operator of the participant device 103, or captures another activity which symbolised signing of the form.

Typically, whether or not to generate a document is defined by the set of rules 119. The document generator of this embodiment also uses the form template for the respective form 109 downloaded to the devices 102 and 103.

Figure9 also shows an email client 122 which is operable to generate emails, typically using addresses retrieved from the relationship database. In this embodiment generating emails is an operation defined in evidencing rules 119 for a given enterprise.

Figure 9 also signature data 123 captured at a device, typically the participant device 103, and associated with the form 109. In this specific embodiment a signature data store 124 is separate from the server 104. The server receives a signature link 125 to the signature data 123 to allow the server to upload the signature data 123. The host device receives a notification 126 from the signature data store 124 and/or participant device 103 when a signature associated with a form 109 has been captured and stored.

In this embodiment the evidencing rules 119 are particular to a given enterprise. In this embodiment also, the rules define storage and transmission operations defining evidencing of the collaboration of the form in the online meeting, or the transaction represented by the form, by the server.

In the example of Figure 9 the stored rules define the following operations for the server: that the server renders the form data and signature data uploaded into a document, such as a pdf, and sends a copy from an email server to addresses for the host and participant retrieved from the relationship database 118, to generate and transmit form status data 120 associated with form and signature data to the relationship database 118 and to store the form data and signature, to a storage endpoint at a cloud storage service for the enterprise,

and to send a link to the CRM to allow access to data stored by the server or by an operator of a host device or party associated with the enterprise by the CRM, for example.

In some embodiments session data 114 held by the host and participant devices and by the server to identify a particular session of an online meeting. The session data may be used to aggregate form data as entered during a given session. In this embodiment the session data may be a session token of an address for a signature entered in the session.

Figure 9 also shows a form template 110, defined in this embodiment in code in a mark-up language such as XML, for a form to be used to enter data at the host and participant devices. The form includes fields which receive entries of form data. The form template also defines the layout of the form. The form template allows the form data and signature to be rendered into a document or presented at the form display. The server of this embodiment stores a set of forms. Inputs at the host device result in selected commands from the library of commands which select a form template for the server to upload to the devices for collaboration in an online meeting. The template is used by the server to manage form data received from the devices and to render the form data into a form document to be sent to email addresses associated with the host and participant devices.

The server shown in Figure 9 has a document generator 121 which generates, or renders, a document in a standard format such as .pdf using the form template 9 selected by the host device, form data entered into fields of a form displayed at the devices, and signature data captured at the participant device.

The server of Figure 9 also has an evidential storage interface 127 which is operable to generate evidential data transmissions dependent on the set of evidencing rules 119 for the enterprise associated with the host. The evidential storage interface 127 of this example generates an evidential storage data transmission for a cloud storage service 128 at and endpoint defined in the rules 119 or, in alternative embodiments, retrieved from the relationship database 118.

In this embodiment the evidential data transmission is also generated dependent on address data 31 stored for the participant in the meeting, which is retrieved by the server 104 from the relationship database 118. In this example the evidencing storage interface stores at suitable endpoints form

data, and signature data along with a session or meeting key and time stamps. The endpoints of this embodiment are endpoints of a cloud storage service 128 specified in the evidencing rules or, in alternative embodiments, in data separate data stored for a given enterprise. The evidencing storage interface transmits a link 133 to that data to the relationship database.

The server 104 of Figure 9 also includes an email interface 121 which is operable to send emails dependent on the evidencing rules 119 and addresses 130 and 131 retrieved by the server 104 from the relationship database 118. In this example, the email client generates emails with addresses to host email address 130 and participant email address 131. These email addresses are retrieved from the relationship database 118 and the email carries a copy of the document rendered using the form template used in the online meeting between host and participant, the form data entered in the online meeting and signature data entered for the form by the participant.

In alternative embodiments, form data entered at a device may be sent directly to another device in an online meeting with a copy being sent to 20 the server.

In some embodiments the functionality of the devices 102 and 103 are provided by a computer programme running on the device. In some embodiments the programme is provided in the form of instructions which are stored in a programme memory of the device, the programme is run 25 on a processor of the device and uses a working memory of the device. In some embodiments the system, devices and server are configured by or follow processes defined in code and/or data stored on a storage medium. In some embodiments the code and/or data is configured or transmitted using any suitable format known to the reader. In some embodiments 30 the code and/or data is provided as a software product.

In some embodiments the form displayed using a form template may be displayed differently in the form interface of the host device 102 than of it is displayed in the form interface 105 of the participant device.

In some embodiments evidencing rules may be specific to specific forms 35 or defined types of forms.

In some embodiments a signature notification data is sent to the host device in lieu signature data and the user interface of the host device

Claims:

1. An online meeting controller operable to connect devices having installed an online meeting application which is operable to present a user interface for the device, wherein the user interface of each device is operable to display data and/or documents and/or video data from the other device so as to allow users at each device to participate in an online meeting, the controller being operable to:

communicate with a relationship manager which is operable to identify a user of a device as a host for an online meeting and identify a user of a device as the participant to be invited to the online meeting by the host, wherein the controller is operable to receive from the relationship management database first validation data which validates a device as a host device for an online meeting to be operated by a host of the meeting and second validation data which validates a device as a participant device to be operated by a participant invited to the online meeting;

communicate with the application running on a validated host device and a validated participant device so as to synchronise the user interfaces at the host and participant devices and so as to receive updates to data and/or documents and/or forms displayed at the user interfaces of the host and participant devices, wherein the updates are inputs received at the user interfaces of the host and/or participant devices;

store the updated and synchronised data and/or documents using a key for the online meeting; and

communicate with a video communication system which provides a video communication service between devices, wherein the controller communicates with the video communication service to initiate a video communication session through which the host device can connect with the participant device.

2. The online meeting controller of claim 1, wherein the controller is operable to communicate with the host and participant devices using a library of command code which is accessible to the controller and each device and which allows the controller to control the user interfaces presented at each device.

3. The online controller of claim 2 operable to communicate commands to the video service in response to the controller receiving command code from the host device to allow the host to control one or more functions of the video service from the host device.

4. The online meeting controller of claim 3 operable to control the video service to record video in response to command code received from the host device to start and stop video recording, operable to store the recorded video and operable to communicate a link to the relationship manager to allow the host operating the host device to control the capture of video from an online meeting.

5. The online meeting controller of any one of claims 1 to 4 operable to control the user interface of the participant device in response to command code received from the host device to allow a user interface at a participant device to be controlled by the host to control the online meeting from the host device.

6. The online meeting of any one of claims 1 to 5 operable in response to commands received from the host device to communicate a document or form selected from a set of documents to the participant device and to and store a version of the document updated by inputs at the participant device.

7. The online meeting controller of any one of claims 1 to 6 operable to generate an invitation for a participant in response to a request received from the relationship manager, the invitation containing validation data to validate the participant device for an online meeting.

8. The online meeting controller of any one of claims 1 to 7 operable to store data and/or document and/or form updated in the online meeting by inputs at the user interfaces and to communicate a link to the stored data and/or documents to the relationship manager.

9. The online meeting controller of claim 8 operable to store the updated data and/or document and/or form in response to a command received from the host device and to store the data and/or documents dependent on a set of rules associated with the host.

10. The online meeting controller of claim 9 wherein the controller is operable in response to receiving a command from the host device to transmit the data and/or document and/or form using address data associated with the participant.

11. The online meeting controller of any one of claims 1 to 10 operable to synchronise data and/or documents and/or forms and store updated data and/or documents and/or forms received at the host or participant device in association with an identifier and/or key which persists over a two or more video sessions to provide an online room in which data and/or documents and/or forms can be updated between video sessions.

12. An online meeting controller operable to capture and evidence a transaction made in an online meeting between operators of two or more devices each device having installed thereon an application operable to display one or more forms having one or more data fields to display form data, the controller operable to:

communicate with a relationship manager to identify a user of a device as a host for an online meeting and identify another user of another device as a participant to be invited to the online meeting by the host, to receive from the relationship management database validation data which validates the device as a host device to be operated by a host of the online meeting and validates another device as a participant device to be operated by the participant;

communicate with the application installed on a validated host device and a validated participant device so as to control each application to display a form, so as to receive form data entered at one or more fields of the form displayed at the validated host device and validated participant device and so as to cause the applications to display forms with synchronised form data;

communicate with the application running on the validated host device or validated participant device so as to receive signature data captured at the device while synchronised form data is displayed at each of the validated devices;

retrieve a set of one or more stored evidencing rules dependent on data received from the relationship manager identifying the host;

generate an evidencing file dependent on the evidencing rules retrieved, the evidencing file carrying synchronised form data displayed as the signature data was captured and carrying the signature data;

generating an evidencing transmission for one or more cloud endpoints and/or one or more addresses and/or one or more storage locations defined in the evidencing rules, the evidencing transmission carrying the evidencing file to evidence the transaction made in the online meeting.

13. The online meeting controller of claim 12 wherein the evidencing rules are associated with the host through a stored association between the host and an enterprise, the association stored by a relationship manager.

14. The online meeting controller of claim 12 or claim 13 operable to communicate with a video communication system which provides a video communication service between devices, wherein the controller communicates with the video communication service to initiate a video communication session through which the host device can connect with the participant device.