

Demonstratives for Oral Hearing:
Callidus v. Versata, CBM2014-00052
(U.S. Patent No. 7,904,326)

*October 29, 2014, 1:00PM
Patent Trial and Appeal Board
U.S. Patent and Trademark Office
Madison East, 9th Floor, Conf. Rm.
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Claims Directed to Abstract Ideas are Unpatentable

35 U.S.C. § 101 -- Principles of Law

“Whoever invents or discovers any new and useful process, machine, manufacture, or composition of matter, or any new and useful improvement thereof, may obtain a patent therefor, subject to the conditions and requirements of this title.” 35 U.S.C. § 101. Supreme Court precedents provide three specific exceptions to the broad categories of § 101: laws of nature, physical phenomena, and abstract ideas. *Bilski v. Kappos*, 130 S. Ct. 3218, 3225 (2010).

● Institution Decision at 11

Alice v. CLS Bank Provides the Standard for Patent Eligibility under § 101.

The Supreme Court in *Alice* was very clear about the standard that should be used to determine patent eligibility under § 101: “First, we determine whether the claims at issue are directed to one of those patent-ineligible concepts. . . . If so, we then ask, “[w]hat else is there in the claims before us?” *Alice Corp. Pty. Ltd. v. CLS Bank Int’l*, 134 S. Ct. 2347, 2355 (2014) (quotations omitted).

● Petitioner’s Reply at 5

'326 Patent Overview

(12) United States Patent Gharavy	(10) Patent No.: US 7,904,326 B2 (45) Date of Patent: Mar. 8, 2011
(54) METHOD AND APPARATUS FOR PERFORMING COLLECTIVE VALIDATION OF CREDENTIAL INFORMATION	FOREIGN PATENT DOCUMENTS EP 0817017 A2 1/1998
(75) Inventor: Shari Gharavy , Austin, TX (US) (73) Assignee: Versata Development Group, Inc. , Austin, TX (US) (* Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 120 days.	OTHER PUBLICATIONS Norman Walsh, XSL The Extensible Style Language [online]. Web Techniques, Jan. 1999 [retrieved on Feb. 11, 2001]. Retrieved from the Internet: <URL: http://www.webtechniques.com/archives/1990/01/walsh/ >. (Continued)
(21) Appl. No.: 09/896,144	<i>Primary Examiner</i> — Andrew Joseph Rudy (74) <i>Attorney, Agent, or Firm</i> — Hamilton & Terrile, LLP; Kent B. Chambers
(22) Filed: Jun. 29, 2001	
(65) Prior Publication Data US 2003/0004840 A1 Jan. 2, 2003	(57) ABSTRACT
(51) Int. Cl. G06Q 40/00 (2006.01) G06F 17/30 (2006.01)	An embodiment of the invention comprises a method and apparatus for performing collective validation of credential information. The invention has applicability in industries that require sales agents or those related to the distribution of a certain product to be credentialed (e.g., licensed and/or appointed) when selling certain products (e.g., life insurance, etc . . .). For example, in order to sell some financial instruments sales representatives must meet state and/or federal licensing requirements. Embodiments of the invention provide a way to ensure that sales representatives operate within any regulatory constraints put in place by government or any other organization. Companies may, for instance, utilize
(52) U.S. CL 705/10; 705/44 (58) Field of Classification Search 705/33, 705/7, 10, 30, 38, 44 See application file for complete search history.	
(56) References Cited	
U.S. PATENT DOCUMENTS	

● '326 Patent (Exh 1001)

'326 Patent Overview – Specification

SUMMARY OF THE INVENTION

An embodiment of the invention comprises a method and apparatus for performing collective validation of credential 55 information.'

One aspect of the invention provides a method for validating sales agents' credentials while processing the sales transaction data to determine commission amounts. The system is configured to perform such transaction processing in an efficient manner that minimizes the amount of computational 5 resources required to determine whether a sales agent has valid credential at the time of a particular sale and is therefore entitled to compensation (e.g., a commission) for the sale.

- '326 Patent 1:54-56. 2:1-8: Petition at 11-12.

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