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Table with 5 columns: APPLICATION NO., FILING DATE, FIRST NAMED INVENTOR, ATTORNEY DOCKET NO., CONFIRMATION NO.
11/293,350 12/01/2005 Ramakrishna Satyavolu P3977CIP 3250

24739 7590 10/17/2008
CENTRAL COAST PATENT AGENCY, INC
3 HANGAR WAY SUITE D
WATSONVILLE, CA 95076

EXAMINER

NGUYEN, MAIKHANH

Table with 2 columns: ART UNIT, PAPER NUMBER

2176

Table with 2 columns: MAIL DATE, DELIVERY MODE

10/17/2008

PAPER

Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

DETAILED ACTION

1. This action is responsive to the amendment filed 06/10/2008.

Claims 1-8, 10-14, 16-20, and 22-24 are currently pending. Claims 1 and 13 are independent claims.

Rejections - 35 USC § 102

2. The following is a quotation of the appropriate paragraphs of 35 U.S.C. 102 that form the basis for the rejections under this section made in this Office action:

A person shall be entitled to a patent unless -

(e) the invention was described in (1) an application for patent, published under section 122(b), by another filed in the United States before the invention by the applicant for patent or (2) a patent granted on an application for patent by another filed in the United States before the invention by the applicant for patent, except that an international application filed under the treaty defined in section 351(a) shall have the effects for the purposes of this subsection of an application filed in the United States only if the international application designated the United States and was published under Article 21(2) of such treaty in the English language; or "
(Emphasis added.)

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Claims 1-8, 10-14, 16-20, and 22-24 maintain rejected under 35 U.S.C. 102(e) as being anticipated by **Kumar et al.** (US 6859212, filed 04/06/2001).

As to claim 1:

Kumar teaches a system tangibly embodied on a computer-readable medium for categorizing transactions [*see the Abstract and col. 5, lines 17- 48: itemized transaction*], comprising:

- a collection function gathering information concerning transactions, including at least date, description and amount of the transactions, for a particular person or enterprise [See *Col. 14, lines 41-37; Col. 15, lines 1-60: Agent 39 may be programmed to perform certain tasks such as obtaining account information, executing simple transactions, returning user-requested notification information about upcoming events*]; and
- a processing function categorizing individual ones of the collected transactions according to at least part of the transaction description [*See the Abstract: a transaction module having a summary interface is provided as part of a software suite for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of data sources and accessible through a single interfacing node operated on a data-packet-network. The transaction module comprises, an interactive*

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*main interface accessible through the summary interface, the main interface for listing new transactions related to registered financial accounts ...**assigning categories to the listed transactions** & Col. 38, line 18 - Col.39, line 17: These default categories are intelligent, in that **transactions are automatically categorized** with an appropriate category as they occur and are entered under the appropriate category based on a user's prior categorization scheme...When new transactions occur, they **are automatically categorized** according to user preference];*

wherein the collection function automatically retrieves the information concerning transactions from third-party Internet-connected web sites adapted to provide account information to the particular person or enterprise [See col.6, lines 34-50; Col. 11, line 36- Col. 12, line 19; Col. 13, line 22- Col.14, line 8; Col. 18, line 52- Col. 20, line 19: the interactive transaction-viewing interface is a personalize hyper-text markup language interface ... the remote node is a cellular phone ...a hand-held computer ... the categorical criteria for viewing transaction include account, timeframe, and by category including food and beverage, utilities, home, auto, charitable contribution, and entertainment ... is presented for ordering a graphic chart according to the selected criteria].

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As to claim 2:

Kumar teaches a compilation function summarizing transactions in individual categories [See the Abstract and Col. 1, lines 26-35: *an interactive software functionality enabling management and transactional control including categorized viewing of personal transaction data including account data maintained on behalf of users by an entity providing data compilation, aggregation, and summary services*].

As to claim 3:

Kumar teaches a reporting function reporting the summarizing transactions to the particular person or enterprise [See Col.11, line 63 - Col. 12, line 20: *knowledge of specific WEB pages, and certain types of WEB pages, is highly desirable. In many embodiments characteristics of destination WEB pages are researched by persons (facilitators) maintaining and enhancing Password-All Portal software 35, and many characteristics may be provided in configuration modules for users to accomplish specific tasks ... task results including reports, and hard documents such as airline tickets may be sent over the Internet or other data packet-networks to user-defined destinations such as fax machines, connected computer nodes, e-mail servers, and other Internet-connected appliances*].

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As to claim 4:

Kumar teaches categorization is done according to category definitions entered by the particular person or on behalf of the enterprise *[See Col. 15, lines 12-59: enable directive input from both a client (user) and a knowledge worker or workers associated with the service... a unique input scripting module 79 that is adapted to allow a human knowledge worker to create and supply directive scripts containing the site logic needed by gatherer 67 to find and retrieve data from a WEB site].*

As to claim 5:

Kumar teaches categorization is done for a first plurality of persons or enterprises subscribing to the system according to category definition entered by a second plurality of persons or enterprises subscribing to the system *[See Col. 20, lines 7-64: particular site associated with the request URLs ... then all site logics for those URLs are accessed ... retrieved at a schedule time for performing the summary gathering].*

As to claim 6:

Kumar teaches categories are developed from information taken from communication between clients and the system *[See the Abstract; Col. 6, lines 22-50; and Col.8, line 56- col.9, line 30: a summary interface ... for enabling viewing and manipulation of multiple categories of aggregated data ... a remote*

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node having access to the data-packet network].

As to claim 7:

Kumar teaches a probability algorithm is used in developing categories [See Col.3, lines 23- 44: a plurality of report algorithms ... matches the request to an individual one of the report algorithms. The data-gathering subsystem accesses plural Internet sites associated with the user and extracts raw data therefrom according to needs of the report algorithm. The report processor processes the raw data according to the report algorithm into meta-summarized information defined by the report algorithm, and the portal system transmits the meta-summarized information as a report to a destination associated with the report request].

As to claim 8:

Kumar teaches identifiers for categories are periodically amended according to further information that is collected and processed [See Col. 20, lines 31- col. 21, line 25: specified URLs for the purpose of gathering summary data].

As to claim 10:

Kumar teaches the system reports to clients through the Internet network [See Col. 14, lines 22- 57: Internet servers 23, 25, and 27 represent servers ... return certain summary information contained on user-subscribed WEB pages, such as

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account summaries, order tracking information and certain other information according to user-defined parameters].

As to claim 11:

Kumar teaches function storing past transaction history associated with the particular person or enterprise [*See Col. 5, line 7 - col. 6, line 14: categorical viewing of transaction history ... by a specific account, a specified timeframe, and by a selected category. Additionally, the options are selectable for ordering combinations of criteria for producing a transaction view, wherein the transaction view comprises an ordered history view].*

As to claim 12:

Kumar teaches past transaction history is used to predict future transaction statistical information [*See Col. 5, line 17- Col. 6, line 21: history view].*

As to claim 13:

Refer to the discussion of claim 1 above for rejection. Additionally, Kumar teaches automatically navigating to third-party Internet-connected web site [*See Col. 2, lines 38-53; Col. 11, lines 12- 34; Col.13, lines 22- Col. 14, line 40: provide an automatic and transparent login function for the subscriber while jumping the subscriber to subject destination].*

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As to claims 14, 16, 18-20, and 22-24:

Refer to the discussion of claims 2, 4, 6-8, and 10 -12 above, respectively, for rejections.

As to claim 17:

Kumar teaches categorization is done for a first plurality of person or enterprises to category definition entered by a second plurality of person or enterprises [See Col. 15, lines 12-59: *enable directive input from both a client (user) and a knowledge worker or workers associated with the service... a unique input scripting module 79 that is adapted to allow a human knowledge worker to create and supply directive scripts containing the site logic needed by gatherer 67 to find and retrieve data from a WEB site*].

Response to Arguments

3. Applicants' arguments filed 06/10/2008 have been fully considered but they are not persuasive.

Regarding independent Claims 1 and 13:

Applicant argues in substance that Kumar does not teach "a processing function categorizing individual ones of the collected transactions according to at least part of the transaction description."

The Examiner disagrees. Kumar's teaching "*a transaction module having a summary interface is provided as part of a software suite for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of data sources and accessible through a single interfacing node operated on a data-packet-network. The transaction module comprises, an interactive main interface accessible through the summary interface, the main interface for listing new transactions related to registered financial accounts ...**assigning categories to the listed transactions***" [See the Abstract] and "These default categories are intelligent, in that **transactions are automatically categorized** with an appropriate category as they occur and are entered under the appropriate category based on a user's prior categorization scheme...When new transactions occur, they **are automatically categorized** according to user preference" [See Col. 38, line 18 - Col.39, line 17] covers "a processing function categorizing individual ones of the collected transactions according to at least part of the transaction description" as claimed by applicant.

Regarding dependent Claims 2-8, 10-12, 14,16-20, and 22-24:

The arguments are not persuasive for reason as discussed above with regards to independent Claims 1 and 13.

Conclusion

4. **ACTION IS MADE FINAL.** Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

A shortened statutory period for reply to this final action is set to expire THREE MONTHS from the mailing date of this action. In the event a first reply is filed within TWO MONTHS of the mailing date of this final action and the advisory action is not mailed until after the end of the THREE-MONTH shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the mailing date of this final action.

Contact information

5. Any inquiry concerning this communication or earlier communications from the examiner should be directed to Maikhanh Nguyen whose telephone number is (571) 272-4093. The examiner can normally be reached on Monday - Friday from 9:00am – 5:30 pm. If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Doug Hutton can be reached at (571) 272-4137.


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The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Maikhanh Nguyen/
Examiner, Art Unit 2176

/Doug Hutton/
Doug Hutton
Supervisory Primary Examiner
Technology Center 2100

Search Notes 	Application/Control No. 11293350	Applicant(s)/Patent Under Reexamination SATYAVOLU, RAMAKRISHNA
	Examiner Maikhanh Nguyen	Art Unit 2176

SEARCHED

Class	Subclass	Date	Examiner
715	200,201,202,205,209,210,234,273,760,823	9/24/08	MK
705	6,10,26,29,35,40,42,52,53,77,78	9/24/08	MK


SEARCH NOTES

Search Notes	Date	Examiner
West Updated (USPAT, USPPub) - See Search History	9/24/08	MK

INTERFERENCE SEARCH

Class	Subclass	Date	Examiner

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<i>Index of Claims</i> 	Application/Control No. 11293350	Applicant(s)/Patent Under Reexamination SATYAVOLU, RAMAKRISHNA
	Examiner Maikhanh Nguyen	Art Unit 2176

✓	Rejected
=	Allowed

-	Cancelled
÷	Restricted

N	Non-Elected
I	Interference

A	Appeal
O	Objected

Claims renumbered in the same order as presented by applicant
 CPA
 T.D.
 R.1.47

CLAIM		DATE							
Final	Original	09/24/2008							
	1	✓							
	2	✓							
	3	✓							
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	23	✓							
	24	✓							

WEST Search History for Application 11293350

Creation Date: 2008092421:58

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