EQUAL ACCESS MATCHING ENGINE SYSTEM AND METHOD

Background of the Invention

This invention relates to online service offering systems and methods, and, more particularly, to matching engines permitting clients to select qualified professionals to perform
5   services on their behalf.

Matching Engines to facilitate dating relationships have existed for years. Such sites store general, unverified information in association with a handle, or nickname, and permit members to search the unverified data to contact a potential mate via a nickname. A relationship can be established via the nicknames and, ultimately, one member can arrange a
10   face-to-face contact with another member and take the relationship offline. In such a system, no anonymous services may be performed by the parties seeking a match.

Other matching engines permit keyword searching of data concerning professionals, including the legal name of the professional, for the purpose of making the initial contacts. No effort is made to mask the true identify of the professional.

15   Neither of these prior art methods is appropriate to enable employed professionals to make their experiences known to potential clients, while maintaining their anonymity and satisfying a client's need to have confidence in the capabilities of the individual. None of the known prior art services permits an ongoing, fully satisfying relationship to be formed between the client and the service provider, while never requiring the revelation of the name
20   of the service provider.

What is needed therefore is a method of enabling a professional to promote his experience and services via a trusted, verifying third party, so as to enable an anonymous yet fully satisfactory working relationship with the client. What is needed therefore is a means for employed professionals to be able to offer their expert services outside their normal
25   working environment without revealing their name, thus protecting the professional from discrimination based on age, gender, or other criteria, and further protecting the professional against potential conflict with his employer.

Summary of the Invention

30   A computerized method allowing a client to select a pre-qualified professional for performing tasks for the client, the method comprising the steps of: (1) receiving professional data representing professional credentials and a pseudonym tag identifier into input fields, the pseudonym tag identifier to be associated with the professional data; (2) storing such data in a database in association with the identifier; (3) verifying such credentials; and (4) if the

1

verification supports a conclusion that the professional is credible or qualified, publishing the professional data of the professional in a keyword searchable database for use by the client in searching among candidate professionals in an effort to uncover data suitable for making an engagement decision.

In a feature of the invention, a candidate professional is provided with name-selection means wherein the professional may choose an identifier which is not his legal name, thus permitting the professional to withhold from publication his legal name and substitute his legal name with a pseudonym, handle or pen name, in order to enable the professional to perform anonymous yet trusted services for the client while providing an identifier enabling the client to engage the same professional for subsequent tasks.

An object of the invention is to enable professionals to perform trusted services anonymously for clients who have selected them based on their professional credentials alone. Such a device reduces the likelihood of discrimination based on age, race, sex, handicap, ethnic origin, geographic location or other subjective and arguably irrelevant bases, given the pervasiveness of the Internet.

Another object of the invention is to enable professionals having specialized skills to anonymously offer their skills to interested clients, without the professional fearing retribution from his employer.

Brief Description of the Drawings

FIG. **1** is a process flow chart of the method of the invention.

FIG. **2** is a block diagram of a system of the invention.

FIG. **3** is a block diagram of an alternate system of the invention.

FIG. **4** is a block diagram of a client/server architecture of the present invention.

FIG. **5** is a detailed diagram of a client/server architecture of the present invention.

FIG. **6** is a screen print of an input page for professional data.

FIG. **7** is a screen print of an input page for client data

FIG. **8** is a screen print of the client keyword search interface of the invention.

FIG. **9** is a screen print of the administrative control panel of the invention.

FIG. **10** is a block diagram of an alternate system of the invention.

Detailed Description of the Preferred Embodiment

Referring again to Fig. **1**, a computerized method 10 generates a searchable database 53a (shown in FIG. **2**) of pre-qualified professionals available to perform tasks for a client

company or individual. The method 10 includes four basic steps. In a first step 12, professional data 13 is input which represents professional credentials and a pseudonym tag identifier 14 into input fields, the pseudonym tag identifier to be associated with the professional data. In a second step 16, such data 13 and identifier 14 is stored in a database 53a, in association with the identifier. In a third step 17, such credentials are verified by a trusted third party verifier 18.   In a fourth step 19, if the verification supports a conclusion that the professional is credible or qualified, the professional data 13 of the professional is published in the database 53 so as to be keyword searchable by the client in searching among candidate professionals in an effort to uncover data suitable for making an engagement decision.

The professional is queried for or invited to input a pseudonym tag identifier 14, together with a message encouraging the professional to choose the pseudonym tag identifier which is not necessarily his legal name (but rather, for example, indicative of his qualifications or specialities), thus permitting the professional to withhold from publication his legal name and substitute his legal name with the pseudonym tag identifier 14 (a.k.a., handle or pen name) for association with his professional data 13. This enables the professional to perform anonymous yet trusted services for the client while providing an identifier enabling the client to engage the same professional for subsequent tasks.

Referring now to FIG. **2**, a block diagram of a typical terminal 20 for interacting with the server software encoded with the method 10 of the present invention. The method 10 is encoded on a computer-readable medium operating on a server 54 optionally available to such terminals 20 via the Internet. The method 10 manages the work flow associated with seeking, engaging and compensating a potentially anonymous yet verified professional.

Referring now to FIGs. **2** and **3**, a system 21 involves a network of client computers 22 and servers 54 and 54' in a manner similar to that of current dating match engines such as www.friendfinder.com.   Such a computer system 20 typically includes computers 22 (each having a display device 24, an input device 26 such as a keyboard, a primary storage device 30, a secondary storage device 32 and associated with a client, a searcher, or an administrator) and a plurality of resources 23. Each resource 23 is operatively coupled to at least one of the computers 22. Resources 23 include, but are not limited to, printers, databases, special-purpose servers, security devices, modems, etc.

After loading of software encoded with the method 10 of the invention in the cache or ram of the terminal 20 (such as downloading of code from the central server **53** or **54** in xml or html format), the display device 24 displays a page layout 34 to define the display of text

and graphics for the user, to facilitate input for transmittal to the central server **53 or 54**. Display devices 24 include printers and computer display screens such as a CRT, LED displays, and LCDs. Input devices 26 are numerous and include keyboards and pointing devices such as a mouse 27 having a left mouse button 28 and a right mouse button 29, a trackball, lightpens, thumbwheels, digitizing tablets, microphones using voice recognition software, and touch screens and pads.

The computer 22 includes a CPU 36 as well as other components with which all who are skilled in the art are familiar. For a detailed discussion of these components and their interaction, see U.S. Pat. No. 5,787,254, the content of which is incorporated herein by reference thereto.

Referring again to FIG. **3**, the system 21 may optionally includes client computers 22 arranged in a network 25 and a firewall 27 which interfaces with an online service provider 28 such as CompuServe, America Online, a subscription resource (such as "WESTLAW") and/or an Internet access provider 29. The online service provider 28 and Internet access provider 29 connect to the server 54 via the Internet.

FIG. **4** illustrates a block diagram of a client/server architecture which can be utilized in accordance with the method 10 of the present invention. User requests 50 for information are sent by a client 52 to a server 54. The client 52 is essentially the computer 22 of FIG. **2** running browser software 60 and connected to the Internet. Server 54 executes the basic steps of the method 10 and, based upon these user requests, presents the filtered electronic information as server responses 56 (e.g. keyword search results of searcher data) to the browser software 60.

FIG. **5** illustrates a detailed block diagram of a client/server architecture which can be utilized in accordance with the method 10 of the present invention. Although the client 52 and server 54 are processes which are operative within two computer systems, these processes being generated from a high-level programming language (e.g. PERL), which is interpreted and executed in a computer terminal 20 at runtime (e.g., a workstation), it can be appreciated by one skilled in the art that they may be implemented in a variety of hardware devices, either programmed or dedicated. Client 52 and server 54 communicate using the functionality provided by an HTTP connection 72. The World Wide Web includes all the servers adhering to this standard which are accessible to clients via Uniform Resource Locators ("URLs").

Thanks to browser software 60 such as Internet Explorer, 1X, Cartagio or other lesser known software such as Opera, despite a user not having formally downloaded and installed custom client software, the method 10 is active within the client 52 establishing the

4

connections with the server 54 and presenting information to the user in accordance with the method. Server 54 executes the corresponding server software which presents information to the client in the form of HTTP server responses 62. The HTTP responses 62 correspond with web pages represented using HTML or other data which is generated by the server. A web page contains data and a layout language which describes how data should be displayed, (examples of such layouts are found in FIGs. **6**, **7, 8,** and **9**. The layout language used within each web page is predominantly HTML, but may also include "JAVA", "JAVASCRIPT", VRML, or any other language which supports hypertext functionality 64. The user views a web page (e.g., 152 of FIG. **6**) from the World Wide Web using the method 10 of the present invention. The method 10 accepts the data and the layout language and in response, produces a graphical image containing hypertext links along with text, graphics, and various other types of multimedia. The tools needed to implement the method 10 are known in the prior art. In addition to the HTML functionality 64 provided by server 54 (i.e., display and retrieval of certain textual and other data based upon hypertext views and selection of items), a Common Gateway Interface ("CGI") 66 is provided which allows the client program to direct server 54 to commence execution of a specified program contained within server 54. This includes a keyword search interface 172 (shown in FIG. **8**) powered by a search routine which scans received information in the server 54 for presentation to the user controlling the client. Using this interface and the HTTP responses 62, the server 54 may notify the client 52 of the results of that execution upon completion of the program steps.

Further, because HTTP is a stateless protocol, every user request 50 for information from the server 54 is treated independently, with the server having no memory of previous connections. This statelessness results in the rapid and efficient transmission of hypertext documents.

Referring again to FIG. **3**, where the method 10 operates on an intranet 25, the relational database 53 is a client-server type 53b. The advantage of use of a client-server database 53b and access system is that processing on the database server 54'does not affect processing on the client 52. Either type of database 53a or 53b may be defined and managed by "PARADOX" software, by Borland International, Inc., of Scotts Valley, CA. PARADOX for DOS is a relational database that has features required for storing, viewing, printing, changing, sorting and finding data in tables such as Table 7. PARADOX has a character user interface (CUI), supports a mouse and WINDOWS in that environment, and, together with its query by example (QBE) facility, provides all the tools which a person of ordinary skill will require in order to develop the relations and tables of the method.

The system 20 described above is particularly suitable for use in an Internet environment. The Internet is particularly suitable for bringing together professionals offering diverse, verified services to clients seeking such services because the Internet is pervasive, color and gender blind, unaware of physical handicaps, and generally amenable to anonymity.

5   Referring now to FIG. **6**, a candidate professional layout **152** for inputting a pseudonym tag identifier 14, as well professional data 13 potentially pertinent to the engagement decision of the client, includes input fields **154**.

Referring now to FIG. **7**, a client signup input page **162** for inputting client information enables the purveyors of the system 20 to qualify clients as well.

10   Referring now to FIG. **8**, a search interface **172** for inputting keywords **174** works with a database query algorithm of standard form to enable a client to search the fields of professional data input using the candidate professional layout 152 to find pseudonym tag identifiers 14 that correspond to pre-qualified professionals offering services corresponding to the needs of the client.

15   Referring now to FIG. **9**, an administrative control panel **182** enables a system administrator to set access permissions, approve, disapprove or discipline users (clients and/or professionals) of the system.

The method 10 enables communication with the professional via, for example, email including in the email the pseudonym of the professional (e.g., supersearcher@patent.info),
20   automatically generated upon selection of a pseudonym tag identifiers 14 and acceptance of the professional's candidacy, and publication of the corresponding professional data 13 on the database 53 of the invention. Internally managed and optionally screened or supervised chat between the client and his offered as well.

The method 10 of the invention is particularly applicable to service providers
25   supporting highly trusted third parties, such as doctors and patent attorneys. Examples of particularly applicable professions are IP paralegals, doctor's aids, business intelligence researchers in support of an online investigation, private investigators working for an attorney, trademark searchers, patent searchers, or graphics and web designers working for a well-known, established and trusted firms, such as Interland™ services or Webvertising™.

30   Referring now to FIG. **10**, the method 10 is implemented in a hardware and software environment, on, for example, an apparatus 11. For the purposes of the invention, apparatus 11 may be any type of computer, or computer system, including a client computer, a server computer, a portable computer, or a handheld computer, etc. Moreover, apparatus 11 may be

implemented using one or more networked computers, in a cluster or other distributed computing system such as the Internet. Apparatus 11 is hereinafter referred to as a "computer".

Computer 11 typically includes at least one processor 13 coupled to memory 15. Processor 13 may represent one or more processors (e.g., microprocessors), and memory 15 may represent the random access memory (RAM) devices comprising the main storage of computer 11, as well as any supplemental levels of memory, e.g., cache memories, non-volatile or backup memories, read-only memories, etc. In addition, memory 15 may be considered to include memory storage physically located elsewhere in computer 11, e.g., any cache memory in a processor 13, as well as any storage capacity used as a virtual memory, e.g., as stored on a mass storage device 17 or on another computer coupled to computer 11 via network 18 (e.g., a client computer 20).

The computer 11 also typically receives a inputs and outputs for communicating information externally. For interface with a user or operator, the computer 11 typically includes multiple input devices 22 (e.g., a keyboard, a mouse, a trackball, a joystick, a touchpad, among others) and a display 24 (e.g., a CRT monitor, an LCD display panel, and/or a speaker, among others). Otherwise, user input may be received via another computer (e.g., a computer 20) interfaced with computer 11 over network 18, or via a dedicated workstation interface or the like.

For additional storage, the computer 11 may also include one or more mass storage devices 17, e.g., a floppy or other removable disk drive, a hard disk drive, a direct access storage device (DASD), an optical drive (e.g., a CD drive, a DVD drive, etc.), and/or a tape drive, among others. Furthermore, computer 11 may include an interface with one or more networks 18 (e.g., a LAN, a WAN, a wireless network, and/or the Internet, among others) to permit the communication of information with other computers coupled to the network. It should be appreciated that computer 11 typically includes suitable analog and/or digital interfaces between processor 13 and each of components 15, 17, 18, 22 and 24 as is well known in the art.

Computer 11 operates under the control of an operating system 30, and executes or otherwise relies upon various computer software applications, components, programs, objects, modules, data structures, etc. (e.g., database management system 32 and database 34, among

others). Moreover, various applications, components, programs, objects, modules, etc. may also execute on one or more processors in another computer coupled to computer 11 via a network 18, e.g., in a distributed or client-server computing environment, whereby the processing required to implement the functions of a computer program may be allocated to multiple computers over a network.

In an advantage of the invention, anonymous professionals are able to perform trusted services anonymously for clients who have selected them based on their professional credentials alone. The invention thus reduces the likelihood of discrimination based on age, race, sex, handicap, ethnic origin, geographic location or other subjective and arguably irrelevant bases, given the pervasiveness of the Internet.

In another advantage, the invention enables professionals having specialized skills to anonymously offer their skills to interested clients, without the professional fearing retribution from his employer.

Multiple variations and modifications are possible in the embodiments of the invention described here. Although certain illustrative embodiments of the invention have been shown and described here, a wide range of modifications, changes, and substitutions is contemplated in the foregoing disclosure. In some instances, some features of the present invention may be employed without a corresponding use of the other features. Accordingly, it is appropriate that the foregoing description be construed broadly and understood as being given by way of illustration and example only, the spirit and scope of the invention being limited only by the appended claims.

What is claimed is:

1. A computerized method generating a database of pre-qualified professionals available to perform tasks for a client, the method comprising the steps of:

(a) receiving professional data representing professional credentials and a pseudonym tag identifier into input fields, the pseudonym tag identifier to be associated with the professional data;

(b) storing such data in a database in association with the identifier;

(c) verifying such credentials; and

(d) if the verification supports a conclusion that the professional is credible or qualified, publishing the professional data of the professional in a keyword searchable database for use by the client in searching among candidate professionals in an effort to uncover data suitable for making an engagement decision.

2. The method of claim 1, wherein the professional is provided with name-selection means allowing the professional to choose an identifier which is not his legal name, thus permitting the professional to withhold from publication his legal name and substitute his legal name with a pseudonym, handle or pen name for association with his professional data, in order to enable the professional to perform anonymous yet trusted services for the client while providing an identifier enabling the client to engage the same professional for subsequent tasks.

3. The method of claim 1, wherein the professional is a business intelligence researcher, trademark searcher, patent searcher, private investigator, graphics designer, or web designer.

4. A computerized system comprised of a server, a database, and data trusted reviewer, wherein the database is populated with professional data associated with pseudonym or handle of pre-qualified professionals, and wherein the data is presented to a potential client in keyword searchable format so as to enable to client to perform keyword searches of the professional data as an aid to his making an engagement decision.

EQUAL ACCESS MATCHING ENGINE SYSTEM AND METHOD

Abstract of the Disclosure

A computerized method allowing a client to select a pre-qualified professional for performing tasks for the client, the method comprising the steps of: (1) receiving professional data representing professional credentials and a pseudonym tag identifier into input fields, the pseudonym tag identifier to be associated with the professional data; (2) storing such data in a database in association with the identifier; (3) verifying such credentials; and (4) if the verification supports a conclusion that the professional is credible or qualified, publishing the professional data of the professional in a keyword searchable database for use by the client in searching among candidate professionals in an effort to uncover data suitable for making an engagement decision. A candidate professional is provided with name-selection means wherein the professional may choose an identifier which is not his legal name, thus permitting the professional to withhold from publication his legal name and substitute his legal name with a pseudonym, handle or pen name, in order to enable the professional to perform anonymous yet trusted services for the client while providing an identifier enabling the client to engage the same professional for subsequent tasks.
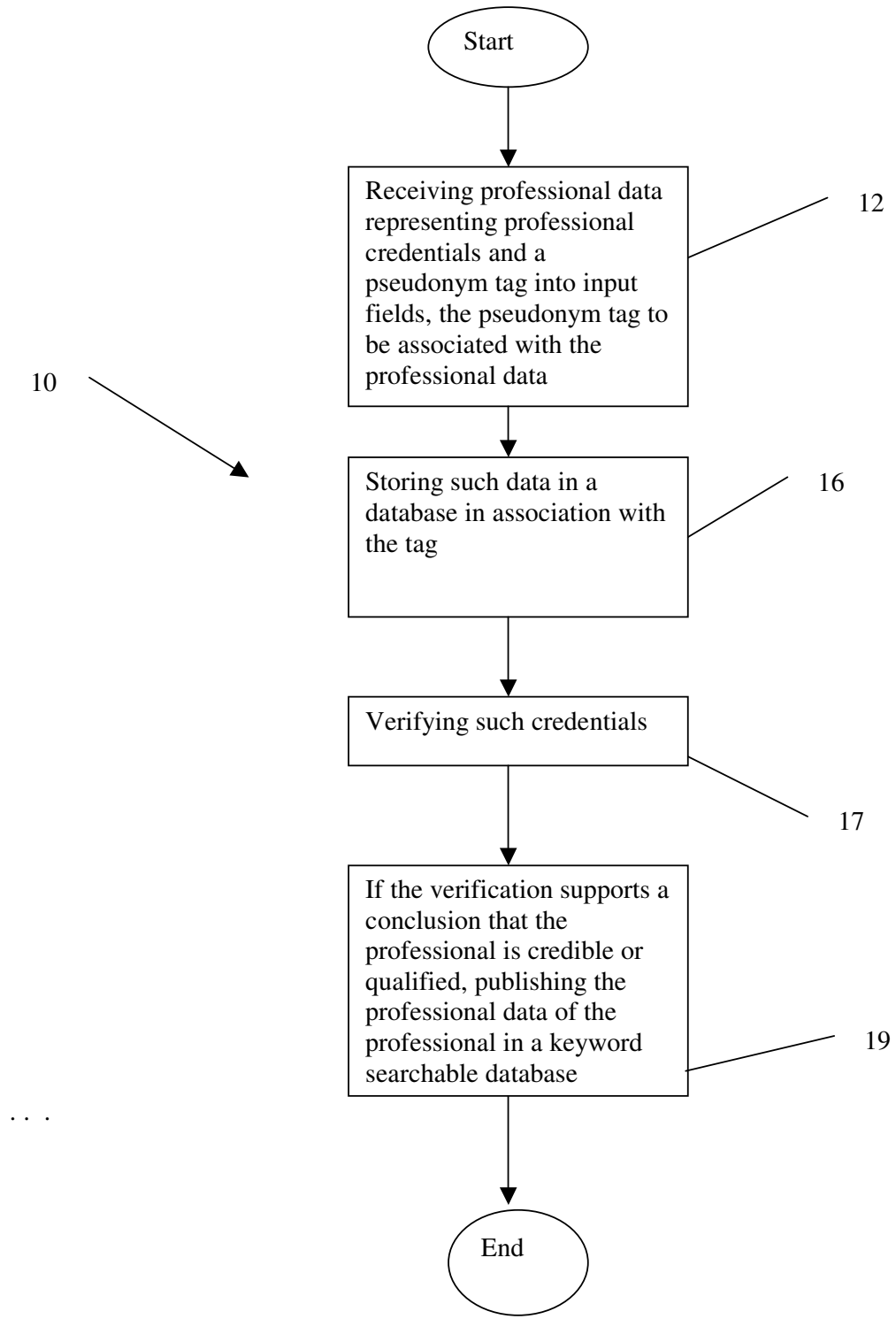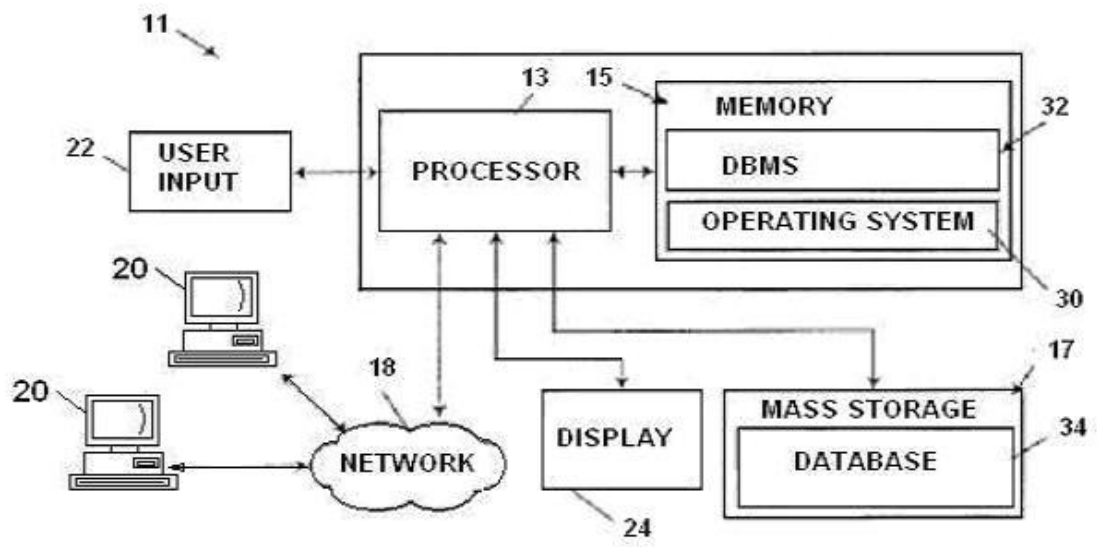
```
                    ┌─────────┐
                    │  Start  │
                    └────┬────┘
                         │
                         ▼
        ┌──────────────────────────┐
        │ Receiving professional data │────────  12
        │ representing professional  │
        │ credentials and a          │
        │ pseudonym tag into input   │
        │ fields, the pseudonym tag to│
        │ be associated with the     │
        │ professional data          │
        └────────────┬───────────────┘
                     │
10 ↘                 ▼
        ┌──────────────────────────┐
        │ Storing such data in a   │────────  16
        │ database in association with│
        │ the tag                  │
        │                          │
        └────────────┬─────────────┘
                     │
                     ▼
        ┌──────────────────────────┐
        │ Verifying such credentials│
        └────────────┬─────────────┘
                                      ────  17
                     │
                     ▼
        ┌──────────────────────────┐
        │ If the verification supports a│
        │ conclusion that the        │
        │ professional is credible or│
        │ qualified, publishing the  │
        │ professional data of the   │
        │ professional in a keyword  │────────  19
        │ searchable database        │
        └────────────┬─────────────┘
. . .                │
                     ▼
                ┌─────────┐
                │   End   │
                └─────────┘
```

FIG. 1

11

FIG.10