OCIO Update

July 28, 2017

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Overview of Trademarks Next Generation (TMNG) Investments

❖ TMNG: FY11 – FY15 (Closed)
  – Deliver TMNG framework, infrastructure, and Examination capabilities

❖ TMNG-2: FY15 – FY19 (Active)
  – Deliver Examination capabilities (deferred from TMNG), and Non-Examination capabilities (e.g., Pre-Exam, Petitions, Post-Registration)

❖ TMNG-External: FY13 – FY19 (Active)
  – Deliver TMNG capabilities to support external Trademarks customers
    o Deliver ID Manual and Electronic Official Gazette capabilities
    o Develop business requirements, create forms and workflow procedures for TMNG-eFile
    o Integrate MyUSPTO and TMNG capabilities as needed

TMNG Path Forward

❖ A joint OCIO, Trademark, and Under Secretary team has been formed to agree upon a path forward to:

   – Complete development and deployment to full production of TMNG-Exam to a single law office

   – Evaluate the value of replacing the custom editor tool with MS Word or another commercial off-the-shelf product in the long-term

   – Perform a third-party analysis of TMNG Exam to include areas such as requirements, user stories and tasks, system architecture, software/code, code analysis tool, defects and other related documentation

❖ Objectives include:

   ☑ Defining Critical Success Factors (CSFs)*

   ☑ Mapping work items (user stories and defects) to the CSFs, and creating/clarifying user stories

   ☑ Scheduling work items into future sprints

   ☑ Defining testing expectations

❖ Result: Detailed schedule for completing development for TMNG Examination; and piloting to the first Law Office

Short-Term Variables Need to be Addressed

❖ Before TMNG Examination is deployed to the initial law office, we must:

– Decide to use the current custom TMNG Editor or a commercial off-the-shelf editor

– If the decision is to switch the editor then implement the chosen editor

– Meet the TMNG Examination Critical Success Factors to include system performance measures

❖ The pace at which TMNG-Examination will be deployed to all Law Offices will be based on:

– Managing the "people side" of the upcoming change (Organizational Change Management efforts)

– Creating and executing a plan for testing and training TMNG-Examination

– Addressing feedback from deployment to the first law office

TMNG-2 Accomplishments

❖ Developing end-to-end electronic workflow for trademark examining attorneys:

- Completed analysis of examiner docket workflows (66 total); deployed all docket capabilities into production; now working to address known defects and anomalies

- Demoed alternative commercial off-the-shelf word processing software products

- Processed 22,125 office actions using TMNG Examination to date; this is 1.75% of the total office actions processed

- Completed four deployments since the last TPAC meeting. The deployments contained enhancements and defect fixes based on the feedback from the beta testers

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TMNG-EXT Accomplishments

❖ Documented business requirements for TMNG-eFile in parallel with competitive acquisition activities (ongoing)

❖ Deployed minor enhancements for the Electronic Official Gazette and the ID Manual based on user feedback

- – Enhanced the "Foreign Registration Number" field in the Electronic Official Gazette to support up to 19 characters
- – Enhanced the "address" field to support in the Electronic Official Gazette up to 40 characters

Upcoming TMNG Work

❖ TMNG-2:

– Deploy TMNG Examination capabilities to Trademark Law Offices
  o Collect, evaluate criticality of any defects and gap requirements (ongoing)
  o Train Law Offices
  o Roll out to Law Offices
  o Training and rollout is dependent on delivery and acceptance of TMNG Examination

– Define, develop and deploy TMNG international application processing capabilities – continuing through FY18

❖ TMNG-External

– Develop and deploy eFile capabilities – continuing through FY18

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Legacy Accomplishments

❖ Deployed several enhancements in the latest releases for Trademark Electronic Application System (TEAS) and TEAS International (TEASi):

  – Implemented new rule on revivals, reinstatements, and petitions to the director that became effective July 8th

  – Simplified filing receipt language and list of next steps for all TEAS forms

  – Improved mark drawing validation to ensure high-quality uploaded images

  – Improved ID Manual feature to validate IDs

❖ Deployed several enhancements for TTABIS and ESTTA to Production on June 16th:

  – Modified Petition for Cancellation, Inter Parties General and ESTTA forms

  – Modified TTABIS to:

    o Accept the applicant/defendant party primary and cc email addresses from TRAM in the new opposition, new cancellation, new EXA, new concurrent use, extension of time, and miscellaneous institution flow

    o Save, view and update proceeding schedules for all proceeding types (opposition, cancellation, concurrent user, and ex parte appeal)

  – Modified the Paralegal Point log to capture the Paralegal Queue information to run reports using the new data

Upcoming Legacy Work

❖ FY18 priorities include:

- Madrid
  o Address the deficiencies in the current system that affect legal rights in the United States
- TEAS
  o Develop and implement mandatory electronic filing
- TRADEUPS
  o Develop and deploy enhancements and defect fixes necessary to maintain the TRADEUPS system
- TTAB
  o Enhance TTABIS/ESTTA to implement upcoming enhancements to be identified by internal and external users through customer feedback

Questions and Comments

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