Trademark Public Advisory Committee Meeting

Raj Dolas

TM NG Portfolio Manager

July 9, 2013

TM NG FY 13 Portfolio

Programs	Projects
Infrastructure Improvements	Authentication Authorization and SSO (AASSO)
TM NG User Interface	User Interface (UI) - Phase 2
TM NG Web and Business Services Program	Web and Business Services 1 (WBS1) - Phase 2
	Web and Business Services 2 (WBS2) - Phase 2
	TM Reporting and Datamart
	Content Management System – Phase 1
TM NG Data Services Program	Trademarks Records Management (TRM) - Phase 2
	TM NG IDM (ID Manual)
Cloud Computing	Trademark Status and Document Retrieval (TSDR) 2.1
	Electronic Official Gazette (eOG)
	eFile Phase 1 – Product backlog and Formless UI
Separation & Virtualization	FY12 TM NG Separation and Virtualization *For separating and virtualizing Trademark legacy systems*

TM NG Progress

- Projects

  - ❖ Authentication & Authorization Single Sign On (AASSO)

    Provide Single Sign On and role-based access

    - ➢ Product installed in production on schedule in December 2012
    - ➢ Integrated Trademark Quality Review System (TQRS) in February, will begin planning work for integrating Datamart and TM NG user interface

  - ❖ User Interface (UI)

    Develop an intuitive user interface that is designed by users

    - ➢ Conducting regular 'User Centered Design' sessions with internal users that enable the design and development of the user interface
    - ➢ Developing user interface for docket management, case-file management, notifications, and deficiency identification based on user feedback
    - ➢ Conducted usability testing with users and provided results/recommendations

TM NG Progress

- Projects (continued) …

  - ❖ Web and Business Services 1 (WBS1)

    Develop and implement business rules and workflow logic
    - ➤ Built workflows and services to support end-to-end management of office actions including draft office actions
    - ➤ Integrated office actions with existing Form Paragraph system
    - ➤ Started migration of case file data from legacy system into TM NG

  - ❖ Web & Business Services 2 (WBS2)

    Build all environments required for TM NG
    - ➤ Completed build out of virtual machines in the production environment
    - ➤ Working on finalizing the networking architecture
    - ➤ Documenting service level agreements and physical map of all environments
    - ➤ Drafting comprehensive plan and cost estimates to support Business Continuity and Disaster Recovery (BC/DR) capabilities

TM NG Progress

- Projects (continued) …

  - ❖ Trademark Reporting and Datamart

    Develop a scalable, easy to use reporting solution for internal users
    - ➤ Successfully deployed v1.0 into production in June, making Quality Review reports available to internal users
    - ➤ Continue importing data from legacy systems and related development that will support additional internal reports

  - ❖ Content Management Systems (CMS)

    Implement a content management system that can handle necessary document types and is extensible to satisfy future needs
    - ➤ Developed services to upload and retrieve images, PDF, ZIP, and XML content. These services are actively used by electronic Official Gazette
    - ➤ Completed 75% of work to map business categories from legacy to TM NG

TM NG Progress

- 🌐 Projects (continued) …

  - ❖ Trademark Records Management (TRM)

    Migrate data from legacy systems and make it available to TM NG
    - ➢ Continuing migration of Trademark data to TM NG, development of data mapping and transformation rules
    - ➢ Demonstrated a prototype to synchronize case data and status between Trademark legacy and TM NG systems

  - ❖ Trademark Status and Document Retrieval (TSDR)

    One-stop-shop convenience by providing access to the status and documents with an easy to use interface
    - ➢ Successfully deployed v2.1 in March

TM NG Progress

- Projects (continued) …

  - ❖ electronic Official Gazette (eOG)

    Provide TM Official Gazette in an electronic format

    - ➢ Deployed Alpha and Beta releases on Google and internal cloud on schedule
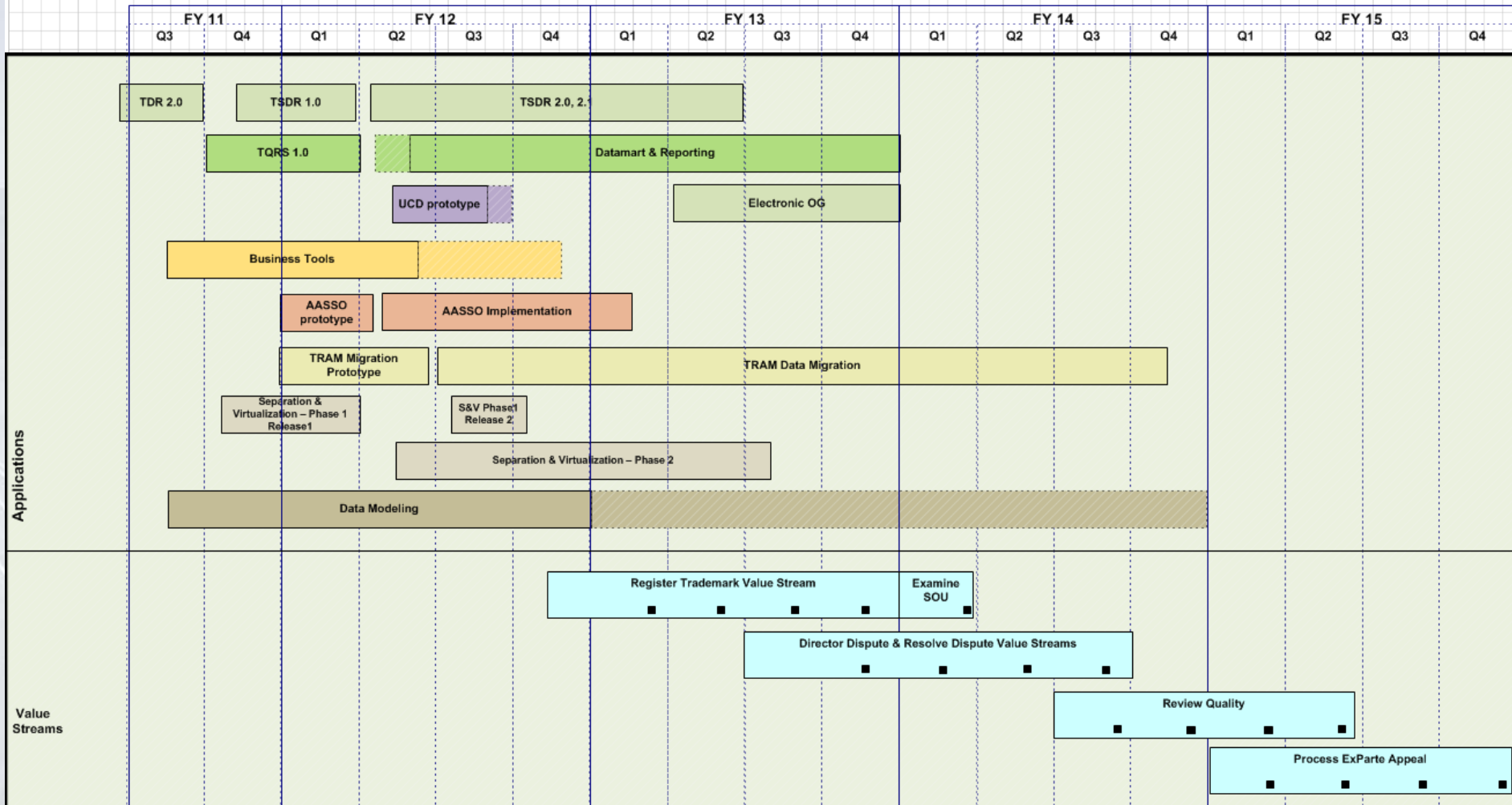   - ➢ Enhanced user Interface and experience based on stakeholder feedback

  - ❖ Separation and Virtualization

    Separate most Trademark systems from others for stabilization, virtualize these systems to reduce footprint

    - ➢ Dependency on other projects has pushed out the deployment schedule. Currently validating schedule across all OCIO support groups
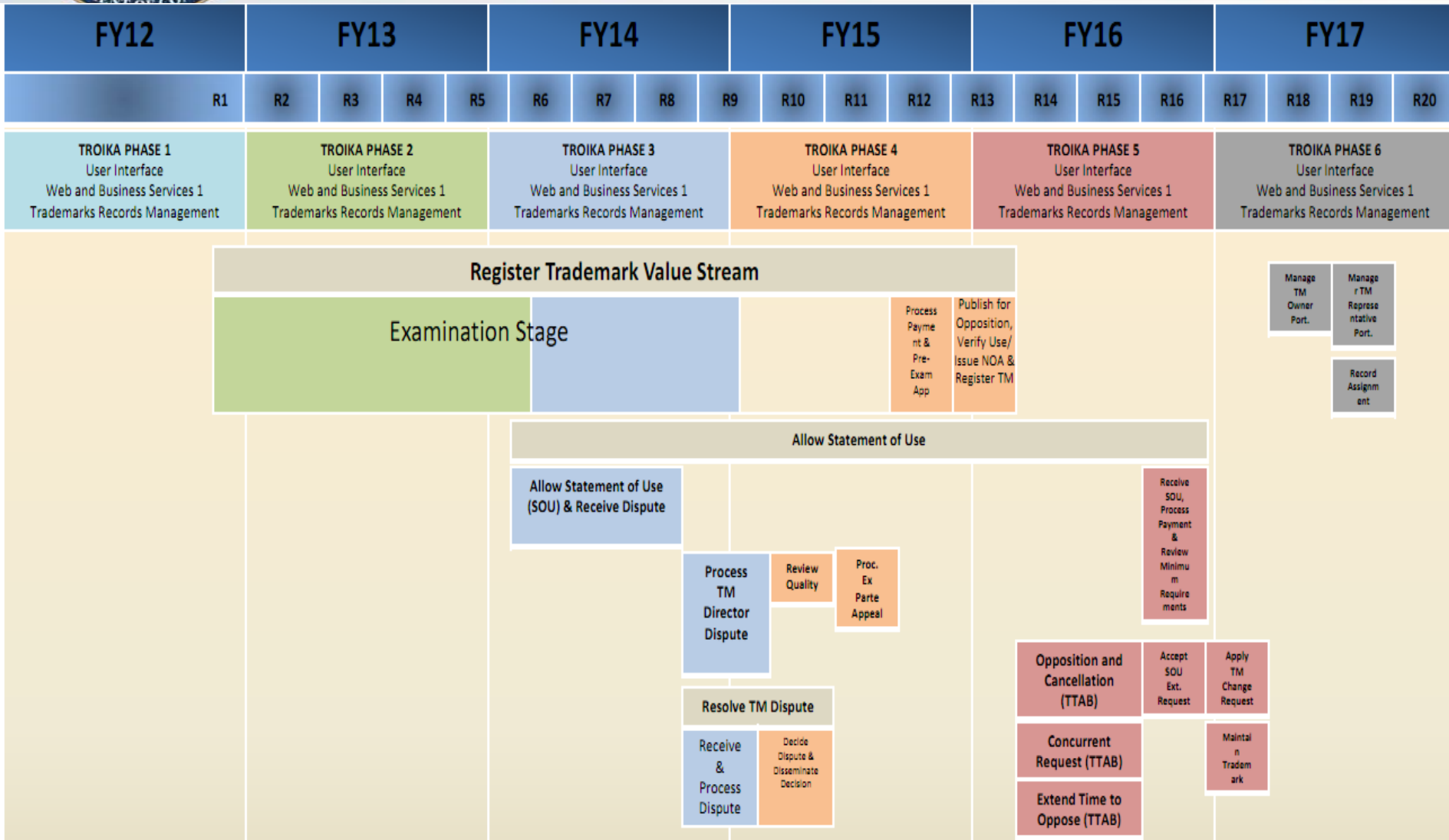
Draft Roadmap as of February 2013

Draft Roadmap as of June 2013

FY12	FY13	FY14	FY15	FY16	FY17
R1	R2 R3 R4 R5	R6 R7 R8	R9 R10 R11 R12	R13 R14 R15 R16	R17 R18 R19 R20

TROIKA PHASE 1
User Interface
Web and Business Services 1
Trademarks Records Management

TROIKA PHASE 2
User Interface
Web and Business Services 1
Trademarks Records Management

TROIKA PHASE 3
User Interface
Web and Business Services 1
Trademarks Records Management

TROIKA PHASE 4
User Interface
Web and Business Services 1
Trademarks Records Management

TROIKA PHASE 5
User Interface
Web and Business Services 1
Trademarks Records Management

TROIKA PHASE 6
User Interface
Web and Business Services 1
Trademarks Records Management

Register Trademark Value Stream

Examination Stage

Process Payment & Pre-Exam App

Publish for Opposition, Verify Use/ Issue NOA & Register TM

Manage TM Owner Port.

Manager TM Representative Port.

Record Assignment

Allow Statement of Use

Allow Statement of Use (SOU) & Receive Dispute

Process TM Director Dispute

Review Quality

Proc. Ex Parte Appeal

Receive SOU, Process Payment & Review Minimum Requirements

Resolve TM Dispute

Receive & Process Dispute

Decide Dispute & Disseminate Decision

Opposition and Cancellation (TTAB)

Accept SOU Ext. Request

Apply TM Change Request

Concurrent Request (TTAB)

Maintain Trademark

Extend Time to Oppose (TTAB)

Trademark Public Advisory Committee Meeting

Marcie Lovett

Director, Trademark Systems Division

July 9, 2013

TM Enhancements and Small Work Requests Progress

- Projects

  - ❖ Trademark Petitions Template Enhancements
    - ➤ 8 new petitions templates scheduled to be deployed on 7/12.

  - ❖ Infrastructure Upgrade – IPV6
    - ➤ TESS suite and XSearch applications migrated to a IPV6 compliant platform on 4/19.
    - ➤ Post-Deployment issues are being resolved in collaboration with support teams

  - ❖ MADRID Processing Stabilization effort
    - ➤ Formulated a tiger team to assess and address MADRID system stabilization needs.
    - ➤ Phase 1 includes addressing 15 priority issues
    - ➤ Development activities are in progress

TM Enhancements and Small Work Requests Progress

❖ **TEAS Form Enhancements**

➢ Development activities for the Release 1 in progress. Tentatively scheduled for a 8/17 deployment date

❖ **TIDM Enhancements**

➢ Phase 1 of this project which includes updates to the ID Checker and IDML editor is scheduled to be deployed on 7/12.

❖ **FAST1 & Snag-It**

➢ Deployments to Trademark Examiners completed

Trademark Public Advisory Committee Meeting

Chris Doninger

Trademark Managing Attorney

July 9, 2013

electronic Official Gazette

TM NG electronic Official Gazette (eOG)

As of June 28, 2013, The United States Patent and Trademark Office has posted a beta version of a new and improved electronic Official Gazette (eOG) at http://eog-test.etc.uspto.gov/

This version is in a tagged XML format and permits tailored searching, downloads and a variety of additional features using a limited set of test data. It demonstrates the majority of the functionality desired by members of the public based on previous user group sessions, though not all such features are yet fully functional.

Please take some time to explore it and be sure to provide feedback via the survey at https://www.surveymonkey.com/s/83BN9PK so that it can be further refined leading up to our September, 2013 full release.