



# Communications/Support Information Guide

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These are the guidelines for communication between the EFS-Web Beta participants and the USPTO. These communications include legal issues, technical issues, recommendations and support requests.

EFS-Web Version 1.0



# EFS-Web Beta Program

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## This Information Guide contains the following sections:

- Welcome
  - Points of Contact
  - Roles
  - Issue Reporting Form
  - Issues and Expectations
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## WELCOME TO THE USPTO EFS-Web BETA PROGRAM!

As a member of the patent community and an EFS-Web Beta Program volunteer, the USPTO Electronic Filing System (EFS) Team looks forward to working with you in evaluating and improving the EFS-Web Beta program.

The USPTO EFS Team looks forward to hearing your thoughts on the EFS-Web Beta program's usability, functionality, and any recommendations for future enhancements. Your feedback will help the EFS Team improve and refine the product for its projected release date of March 17th, 2006. The following Information Guide has been established to help the EFS-Web Beta participants and the USPTO EFS Team establish and maintain clear lines of communication during the EFS-Web Beta Program.

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## POINTS OF CONTACT

The USPTO EFS team as well as the Patent Electronic Business Center (EBC) will provide support to the EFS-Web Beta Program participants.

### Technical Support

EFS-Web Beta participants should contact the EBC for support in using the EFS-Web Beta tool just as e-filers currently do for technical support regarding e-filing and all other EFS products. There will be appointed personnel to specifically address Beta users need and concerns.

### Other Questions and Feedback

All other questions and feedback regarding the EFS-Web Beta program, e.g., issue forms, participant concerns, and feedback, should be emailed to the EFS-Web Beta mailbox [EFSBeta@uspto.gov](mailto:EFSBeta@uspto.gov), and these e-mails will receive a direct response from an individual working on the EFS development team.

The USPTO EFS team requests that EFS-Web Beta program participants use these two (2) avenues of communication only.



The USPTO EFS-Web Team would also like to remind the EFS-Web participants that information disseminated by the USPTO may be sensitive and should not be released to non-EFS-Web Beta participants.

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#### USPTO Points of Contact

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User Guidance	Patent Electronic Business Center (EBC) 1-866-217-9197, select "2" to reach the Patent EBC, then press "9" to reach a EFS-Web beta support customer service representative <a href="http://www.uspto.gov/ebc/efs/help/helpindex.htm">http://www.uspto.gov/ebc/efs/help/helpindex.htm</a> ebc@uspto.gov	6 am - midnight (EST) Monday - Friday
Beta Program Liaison	EFS Development Team EFSBETA@USPTO.gov	8 am - 4:30pm Monday - Friday

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#### ROLES

The following roles have been outlined for both the USPTO EFS team and EFS-Web Beta participants.

#### USPTO EFS-Web Team

The USPTO EFS Team will be responsible for providing EFS-Web Beta Program participants with the following:

- EFS-Web Issue Reporting Form
- EFS-Web Beta Program Information / Communication Guide
  - Contact Information
  - Reporting Guidelines
- Access to the EFS-Web Beta URL
- EFS-Web Quick Start Guide
- EFS-Web Overview
- System Requirements
- Adobe Job Options File and Instructions
- USPTO PDF Guidelines
- PDF Creation Instructions
- Indexing and Supported Documents
- USPTO PDF Fillable Forms and Instructions
- JAVA Overview
- Security Overview

#### EFS-Web Beta Participants

EFS-Web Beta participants are encouraged to provide the following:



- Providing the name of a single point of contact
- Maintaining open lines of communication with the USPTO EFS Team
- Using the EFS-Web tool during the Beta program
- Participation in a mid-Beta focus group session in January 2006
- Providing written feedback regarding the following:
  - General functionality
  - Recommendations for future enhancements
  - Complete description of any discrepancies while working with the EFS-Web Beta tool

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## ISSUE REPORTING FORM

We are anticipating two (2) types of feedback regarding EFS-Web:

### Issue Reporting

1. Enhancement Recommendations
2. Discrepancy Issues (bugs or unexpected behavior) EFS-Web Beta participants should fill out discrepancy reports regarding unexpected or unusual behavior with the EFS-Web Beta tool.

EFS-Web Beta participants are encouraged to submit comments and suggestions as issues occur rather than waiting for a scheduled feedback session. These communications may include, but are not limited to, observations of discrepant behavior by the EFS-Web Beta tool (e.g., bugs or unexpected behavior), recommendations to the EFS-Web Beta tool or workflow, or general comments regarding the EFS-Web Beta tool or program.

### Submitting An EFS-Web Issue Report Form

All EFS-Web Beta participants will receive both a hardcopy and a soft-copy of the "Issue Report Form", which allows the user to enter all the data necessary to describe a recommended enhancement or document a discrepancy observation. This Microsoft® Word form can be submitted at any time via email to the EFSBETA@USPTO.gov mailbox. We encourage the discrepancy report to be sent to the EFS Beta mailbox as an attachment and not copied and pasted into an e-mail.

EFS-Web Beta participants are encouraged to submit discrepancy reports as well as screen shots, when they observe EFS-Web behavior that causes either an abnormal problem or delay in authoring a specification, (e.g., if the user gets an unexpected error message while working with EFS-Web or there are unusual wait times during the submission).

Upon receipt of the Issue Report Form, the USPTO EFS-Web team will assign an EFS-Web Beta Control Number, which will be sent to the submitter of the report by email. If the submitter would like to send follow-up information regarding a previously submitted Issue Report Form, the USPTO EFS-Web Team requests that the user please refer to the assigned



control number. In cases where the submitter requires a response from the USPTO EFS-Web Team on the matter, the USPTO EFS-Web team's response will include the control number.

*Note: The Issue Report Forms do not replace the use of feedback questionnaires.*

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## **ISSUES AND EXPECTATIONS**

### **Live Submissions**

If you don't want to file live submissions, feel free to maneuver around the system, and make constructive recommendations about the tool. We do however, highly encourage you to file live submissions throughout the entire EFS-Web Beta program.

*If you would like to file live submissions, we will be providing a special quality assurance process for these EFS-Web submissions. These filings will receive "100% special Quality Assurance handling" to ensure that the submission is successful. There may be a delay in viewing your submission in Private PAIR, but the anticipated wait time should not exceed one hour, as we will be providing quality control for your submission. If you are unable to view your application in Private PAIR within one hour please contact the Electronic Business Center (EBC) and a Customer Service Representative will be happy to assist you.*

### **Feedback to You from USPTO?**

We will provide you with a comprehensive list of issues and enhancements generated by the EFS-Web Beta Testers.

- We will provide you with an End-Beta report containing all Beta users feedback and suggestions.
- We will provide you with a final report that will give our expectations (and explanations) of "implement-able" fixes/enhancements and our projected schedule for implementation.

### **Thank you again for agreeing to be an EFS-Web Beta Participant!**

The USPTO EFS Team looks forward to working with you to make the EFS-Web tool a submission tool of exceptional quality!