OCIO Update

July 28, 2017

Pam Isom
Director of Application and Engineering Development

Robert Harris
Acting TMNG Portfolio Manager
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
    - Deliver ID Manual and Electronic Official Gazette capabilities
    - Develop business requirements, create forms and workflow procedures for TMNG-eFile
    - Integrate MyUSPTO and TMNG capabilities as needed
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
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
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
    - Collect, evaluate criticality of any defects and gap requirements (ongoing)
    - Train Law Offices
    - Roll out to Law Offices
    - 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
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
  - Address the deficiencies in the current system that affect legal rights in the United States
- TEAS
  - Develop and implement mandatory electronic filing
- TRADEUPS
  - Develop and deploy enhancements and defect fixes necessary to maintain the TRADEUPS system
- TTAB
  - Enhance TTABIS/ESTTA to implement upcoming enhancements to be identified by internal and external users through customer feedback
Questions and Comments

Pam Isom
Director of Application and Engineering Development
Pamela.Isom@USPTO.GOV

Robert Harris
Acting TMNG Portfolio Manager
Robert.Harris@USPTO.GOV