OCIO Update

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Trademark IT Update to TPAC

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Accomplishments

- Trademark Next Generation (TMNG)
  - Planned and started integration of CKEditor into TMNG Examination. CKEditor is the commercial off-the-shelf (COTS) word processing product replacing the TMNG custom editor.
  - Continued migration of registered marks (6.1+ million from January 1970 to September 2017) and TTAB documents (0.8+ million documents from January 1970 to September 2017) into TMNG.
  - Enhanced creation of Registration Certificates and Updated Registration Certificates in .pdf for eOG.
  - Deployed a new maintenance tab for registered marks in TSDR. The tab displays the due date for the next required maintenance filing.
  - TMNG ID Manual (IDM) became the sole ID manual for both internal and external customers in January 2017 with the update of entries required for the 11th Edition of the Nice Agreement.
Status of TMNG Path Forward

- A joint OCIO, Under Secretary, and Trademarks team was created in April 2017
- Team objectives were defined and met to:
  - Evaluate replacing custom editor tool with MS Word or another COTS product
  - Define TMNG-Examination Critical Success Factors (CSFs)
  - Map work items (user stories and defects) to the CSFs, and create/clarify user stories
  - Schedule work items into future sprints
  - Define testing expectations
  - Create a detailed schedule for completing development of TMNG Examination; accepting the product; and deploying to full production to an expanded user group
### TMNG Examination Critical Success Factors

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<th>Critical Success Factor</th>
<th>Status</th>
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| All office actions and briefs are sent either (1) electronically (508 compliant) or (2) on paper via a print queue to the correct customer address and/or appropriate business unit (e.g., TTAB or Madrid). | - All known routing business rules have been documented, developed, and deployed.  
- 508 defects are being addressed.  
- Acceptance is anticipated in Q1FY18. |
| All office actions must be displayed identically in TSDR (i.e., what external applicant sees) and TMNG (i.e., what examining attorney sees). | - Corrections to remaining 66(a) transactions are in process; to be deployed and accepted in Q1FY18. |
| Dockets are complete and correct. Dockets include: Amended, New Case, Statement of Use, Potential Abandonment, TTAB/Jurisdiction, Suspension Check, Corrections, and Print. | - Docket business rules continue to be documented, developed and deployed.  
- User testing and analysis continues as business rules that are less frequently used may arise and need to be addressed.  
- Acceptance is anticipated in Q1FY18. |
| TMNG must maintain data integrity. | - Regular monitoring of the number of locked cases is in progress. |
| System performance must be equal to, or greater than, current FAST-1 and X-Search systems. | - System performance test results are available and are acceptable. Discussions continue around system stability/availability. |
| Examination capability exists to research and prepare a properly formatted office action with supporting evidence. | - Web Capture and Form Paragraph enhancements are in progress; acceptance anticipated in Q1FY18.  
- CKEditor development and integration is in progress; incremental deployment and acceptance is anticipated through Q3FY18. |
Upcoming Work

- **TMNG**
  - Upgrade CKEditor for TMNG eOG and IDM: Q1FY18
  - Complete TMNG Examination development: Q2FY18
  - Complete TMNG Examination deployment: Q3FY18
  - Accept TMNG Examination and rollout to an expanded user group: Q4FY18
  - Rollout TMNG Examination to all Law Offices: Q2FY19
  - Develop and deploy eFile capabilities – FY18/FY19

- **Trademark Production Systems**
  - Madrid: Address the deficiencies in the current system that affect legal rights: Incremental through FY18
  - TEAS: Develop and implement mandatory electronic filing: Q4FY18/Q1FY19
  - TTAB: Enhance TTABIS/ESTTA to implement upcoming enhancements to be identified by internal and external users through customer feedback: Incremental through FY18
MyUSPTO update to TPAC

MyUSPTO Team
Looking back
Spotlight: TM Docket widget

Significant improvements in 2017
TM Docket widget

- 2700+ active docket widgets (i.e. in use, as of 10/20/17); ~50 new every week

- Application and registration docket widgets merged into one

- Developed additional options to add items to dockets
  - Search and add by mark, attorney, owner (in addition to serial and registration numbers)

- Increased the item limit in collections by fifty-fold – from 20 to 1000
  - No limit to the number of collections in the docket

- Implemented status change notifications
  - On-screen
  - Via email - subscribe to updates to ALL items in the docket, or just to specific items
Spotlight: **TM Official Gazette widget**

Added email notifications capability
Looking ahead
Current status, next steps

- The MyUSPTO work in the initial USPTO investment is complete as of 10/2017
- A proposal for a follow-on investment (“MyUSPTO 2”) is in the USPTO investment review pipeline (scheduled review: 11/2017)
- In parallel, the MyUSPTO team is working on several concepts for this next phase
- Implementation of these concepts is subject to investment approval, appropriate internal prioritization, technical feasibility etc.
Concept: **Additional Personalization**

- Default widgets based on interest/role
- Additional personalized workspaces
  Example: a workspace just for TM work, one for other USPTO work etc.
Concept: **Docket widget enhancements**

- Next steps – provide *links to forms* and *calculate due dates* to meet statutory deadlines
- Share docket with other MyUSPTO users
Concept: **TM Form Finder widget**

Users will be able to search for and locate forms by key words or action.
Concept: **TM Simple File widget**

**GOALS**
- Streamline to save time
- Reduce filing errors
- Build foundational elements for the larger TMNG External effort

**APPROACH**
- Start small – Section 1(b) filing basis, word mark only, TEAS RF
- Add functionality progressively
- Stay aligned with TMNG External

**SOME FEATURES**

For Pro Se & inexperienced applicants:
- Plain language
- Context sensitive help & notes
- Integration with ID Manual

For frequent filers:
- Reuse data in part, or in full, from a previously filed application
- Simple and integrated workflow for reviews and e-signatures
- Click to add to docket after filing for easy monitoring
Concept: Mobile and Desktop Views

**MOBILE VIEW**

1. **Mobile friendly design**
2. **Uncluttered, streamlined, plain language**
3. **Help for those who need it**
4. ** Relevant notes**

**DESKTOP VIEW**
Concept: Trademark Simple File (beta)

1. ID Manual Integration
2. Add to docket after filing
3. Pre-filled data from Profile
Thank you!

Please send us your suggestions/ideas/comments
We value and read ALL of them

Use feedback link on My.USPTO.gov
or
Email us directly: myuspto@uspto.gov

Thank you!
Questions & Comments

General Public