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Business Case

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Section A: Investment Summary Information

Investment Name	Unique Investment Identifier
USPTO Patents Product Line	006-000805500

Investment Description

The Patents Product Line investment will innovate the current Patents business; create additional products; retire/decommission more legacy systems; and support Patents products operational activities.

Agency		Point of Contact	
Department of Commerce		Andre Mendes - CIO	
		email	202-482-4797
Investment Type		Bureau	
Major IT Investments		U.S. Patent and Trademark Office	
Mission Support		Shared Service Category	
Not Applicable		Not Applicable	
Shared Service Identifier			
Not Applicable			
Date Investment First Submitted		Date of Last Investment Detail Update	
09/20/2021		05/31/2022	

Section B: Investment Detail

1. Briefly describe the investment's return on investment, including benefits internal and external to the government and outcomes achieved or planned.

Benefits include: DOCX & New Fees processing: Higher quality prosecution and reduction in data capture costs. Patent Search: Roll out and foreign data load. Better tool built by examiners, higher performance and improved access to prior art. ST.26 new standard for Bio-Sequence System: Increased data in new format will improve quality of patents issued. EAI Hub stabilizing and modernizing: Increased stability and reliability of critical system to support patents. Time, Routing & PAP: Compliance with MOU and increased business efficiency P-TACTS: Mitigate PTAB operational and reputational risks of AIA statutory deadlines and appeal pendency
Balanced Scorecard measures

Section C: Investment and Contracts

Public URLs

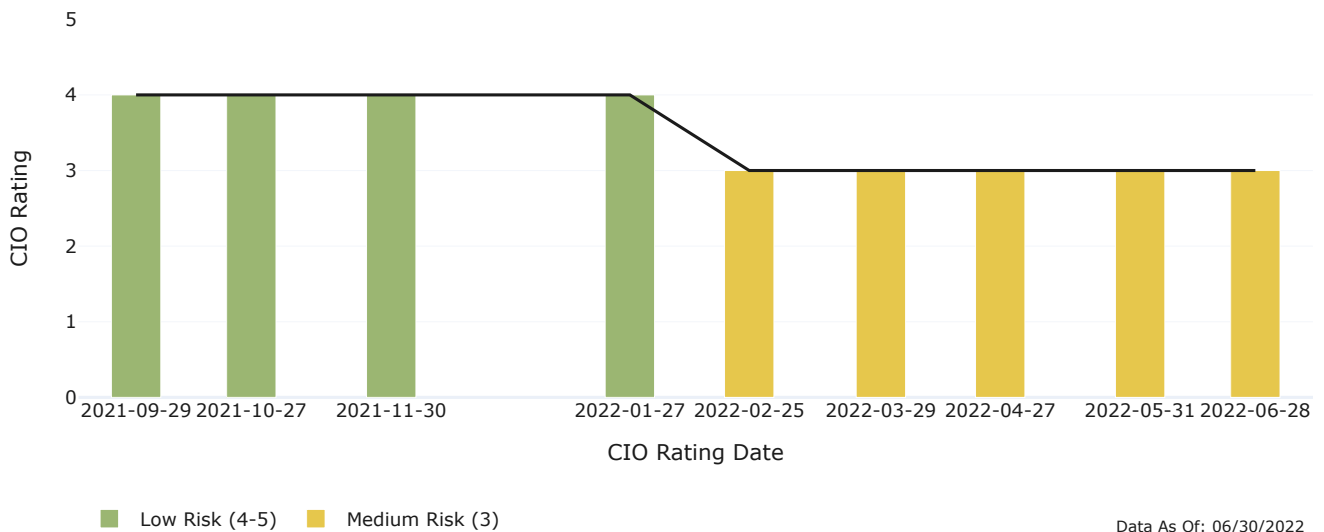
- <https://www.itdashboard.gov/drupal/summary/006/1233>
- <http://www.uspto.gov/>
- <https://globaldossier.uspto.gov/>

Contracts

- [1333BJ20F00280004](#)
- [1333BJ20F00000001](#)
- [1333BJ20F00280006](#)
- [1333BJ21F00284009](#)
- [DOC46PAPT1700338](#)
- [1333BJ19F00280051](#)
- [1333BJ21F00280039](#)
- [1333BJ19F00280006](#)
- [1333BJ20F00280024](#)
- [1333BJ20F00280020](#)
- [1333BJ21F00280011](#)
- [1333BJ20F00280025](#)
- [1333BJ20F00280013](#)
- [1333BJ20F00280040](#)
- [1333BJ20F00283001](#)
- [1333BJ20F00280027](#)
- [1333BJ20F00280031](#)
- [1333BJ21F00282005](#)
- [1333BJ21F00280036](#)
- [1333BJ19F00280060](#)
- [1333BJ21F00282004](#)
- [1333BJ18F00004009](#)
- [1333BJ20F00280017](#)
- [1333BJ21F00280054](#)
- [47QTCK18D0036](#)
- [1333BJ21C00280002](#)
- [1333BJ21F00280007](#)
- [1333BJ20P00280007](#)
- [1333BJ20F00280051](#)
- [1333BJ21F00282035](#)
- [1333BJ21F00280057](#)
- [1333BJ21F00280045](#)
- [1333BJ21C00280004](#)
- [1333BJ20F00283013](#)

- 1333BJ20P00281002
- 1333BJ19F00283010
- 1333BJ21F00280029
- 1333BJ21F00282042
- 1333BJ21F00280025
- 1333BJ21F00282041
- 1333BJ21F00280027
- 15PTO2000295
- 1333BJ20P00280013
- 1333BJ21F00282023
- 1333BJ21F00284008
- 1333BJ21P00000001
- 1333BJ22F00002004
- 1333BJ22F00282011
- 1333BJ22F00002005
- 1333BJ22F00002004
- 1333BJ22F00285002
- 1333BJ22F00282016
- 1333BJ22F00280016

Section D: Historic CIO Rating



CIO Rating	Date	Comments
3	Jun 28, 2022	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Selected Accomplishments: Patent Center: Switched Private PAIR and Public PAIR to stabilize SCORE services which mitigated costs by not maintaining multiple repositories and licenses. Completed document indexing tool which helps users access document codes/descriptions on the screen during filing. Conducted additional training on how to file patent-related documents in DOCX format using Patent Center and EFS-Web. Trained 16,316 users. Patent Exam Center: Transitioned TC2900 Examiners to get more users off legacy systems. Deployed image clarity fix MOU item. Deployed RedBook text release components to enable operator loading of US Patent documents. 8,258 of the 8,700 Patent Examiners have been trained on the new Search tool. Progressing with some risks and issues.

CIO Rating	Date	Comments
3	May 31, 2022	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Selected Accomplishments: Implemented Auxiliary PDF initiative to drive up DOCX adoption. Retirement announcement banner ready to turn on in production for Public PAIR provided the IP Community time to transition to Patent Center. Conducted additional training on how to file patent-related documents in DOCX format using Patent Center and EFS-Web. Trained 16,091 users. 491 users trained to search public information in Patent Center to facilitate the transition from Public PAIR retirement to Patent Center. Started training of TC 1700 and TC 1600 in April 2022. 7,289 of the 8,700 Patent Examiners have been trained on the new Search tool. Progressing with some risks and issues.
3	Apr 27, 2022	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Selected Accomplishments: 6,824 examiners trained on Search, which amounts to over 79% of the examining corps using Search. Deployed continued improvements to DAV to Find Within Document text search in the Application Viewer, which allows for a mix of individual words and phrases to be searched. Deployed bulk CPC services that will support PSTAR transition to the cloud. Trained over 15,800 users on Patent Center and the benefits of filing Patents in DOCX format. Progressing with some risks and issues.
3	Mar 29, 2022	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Accomplishments: Patent Center: Conducted additional training on how to file patent-related documents in DOCX format using Patent Center and EFS-Web. Trained 15,611 users. Implemented Auxiliary PDF initiative to allow more time for applicants to acclimate to DOCX filing and drive up adoption. Patent Exam Center: 6,602 of the 8,700 Patent Examiners have been trained on the new Search tool. Launched Public Search. This is the eventual replacement of PubEAST, PubWEST, AppFT, and PatFT. Patent Business and Content Management Services Maintenance and Enhancements: Deployed Office Correspondence (OC), Reed Technology and Information Services, Inc., (RTIS) and EFSWeb Pilot components to Production. Progressing as expected.
3	Feb 25, 2022	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Accomplishments: Patent Center: Conducted additional training on how to file patent-related documents in DOCX format using Patent Center and EFS-Web. Trained 15,394 users. Patent Exam Center: 5,911 of the 8,700 Patent Examiners have been trained on the new Search tool. Commenced classes for TC 2900 in January 2022. Patent Administrative Center: Completed DevSecOps/CICD technical training to expedite implementation of automated deployment pipelines. Performing with programs risks.
4	Jan 27, 2022	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Accomplishments: Patent Center: Conducted training on how to file patent-related documents in DOCX format using Patent Center and EFS-Web. Trained 15,000 users. Patent Exam Center: 5,070 of the 8,700 Patent Examiners have been trained on the new Search tool. Prepared to deploy Public Search to the Cloud to external users. This will allow for the future retirement of legacy search systems used by the public. Performing with programs risks.
4	Nov 30, 2021	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Accomplishments: Conducted additional classes on Patents on how to file patent applications in DOCX format and the benefits of Patent Center. Trained 13,864 users. 3,866 of the 8,700 Patent Examiners have been trained on the new Search tool. Classes for TC 2400 are currently in progress through early November 2021. Deployed the following Technical Support System (TSS) enhancements: overdue notification emails and current quarter report, and all appealed tab for Quality Lead (QL). Delivered enhancements for the Docket Viewer, the Application Viewer, the Electronic Document Review System (eDRS) and the DAV Docket Management. Performing with programs risks.
4	Oct 27, 2021	The Patents Product Line investment continues to support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Accomplishments: Patent Center: Trained over 13,000 users to date on how to file patent applications in DOCX format and the benefits of Patent Center. PEC: Deployed available foreign collections in Search with over 72M documents with translations for Examiners. Finalized decommission activities in September 2021 for Electronic Business Center Imaging System (EBCIS) system. Patent Exam Center: Prepared initial deployment to Search users for Initial AI and machine learning-based search functionality that has been developed. Patent Business Management Information: Prepared for future retirement of Technical Analytical Forecasting (TAF) database. Performing with programs risks.
4	Sep 29, 2021	The Patents Product Line investment continues support the Patents business by creating additional products; retiring/decommissioning more legacy systems; and supporting Patents products operational activities. Accomplishments: Patent Exam Center: Conducted training for TC 2800 that began in July 2021 and continued through August 2021. 3,296 of the 8,700 Patent Examiners have been trained on the new Search tool. A total of 61 Countries/Authorities of Foreign Images and Text (FIT) are available to examiners using the new Search tool. This is over 72M documents. Patent Center: Conducted additional training webinars on how to file patent applications in DOCX format and the benefits of Patent Center. Trained 11,863 users through August 2021. The legacy e-Patent Reference and Electronic Business Center Imaging System (EBCIS) systems have been retired (users no longer access the system). Patent Trial & Appeal Case Tracking System (P-TACTS): Deployed in August 2021 the minimum viable product of AIA case management in production which replaces the PTAB-E2E Trials System.

Data Last Updated On: 06/30/2022

Section F: Investment Spending

Section E: Investment Spending

Table 1: Distribution by Spending Type			
Spending Type	PY 2021	CY 2022	BY 2023
DME Costs	127.37288	101.561698	96.868143
O&M Costs	16.522764	37.659933	36.462876
Total	143.895644	139.221631	133.331019

Table 2: Distribution by Cost Pools			
Cost Pools	PY 2021	CY 2022	BY 2023
Internal Labor	22.217122	23.18033	25.156284
External Labor	113.834982	97.338261	90.066212
Outside Services	3.94263	9.97	9.583396
Hardware	0	0	0
Software	3.90091	4.911	4.720567
Facilities & Power	0	0	0
Telecom	0	0	0
Other	0	3.82204	3.80456
Internal Services	0	0	0
Totals	143.895644	139.221631	133.331019

Cost Pools

Cost in millions (M)

Table 3: Distribution by IT Towers			
IT Tower	PY 2021	CY 2022	BY 2023
Security & Compliance	0	0	0
IT Management	6.431424	7.498387	5.386746
Network	0	0	0
Data	0	0	0
Compute	0	0	0
Storage	0	0	0
End User	0	0	0
Output	0	0	0
Application	110.93221	84.408253	78.252493
Delivery	14.667989	15.047982	15.360788
Platform	11.864021	32.267009	34.330992
Data Center	0	0	0
Totals	143.895644	139.221631	133.331019

IT Towers

Cost in millions (M)

Data Last Updated On: 05/31/2022

Section F: Project and Activities Detail

Table 1: Project Details

Project Name	Project UID	Status	Project Life Cycle Cost (\$M)	Cost Variance (%)	Start Date	End Date	Schedule Variance (%)	Schedule Variance (Days)
FY22 Patent Center Maintenance and Enhancements	210122	In Progress	14.57	-8	2021-10-01	2022-09-30	0	0
FY22 International Data Exchange Maintenance and Enhancements	210422	In Progress	9.77	-100	2021-10-01	2022-09-30	0	0
FY22 Patent Business Management Information	210722	In Progress	2.87	7.7	2021-10-01	2022-09-30	0	0
FY21 Patent Trial and Appeal Case Tracking System	210521	Complete	10.29	34	2020-10-01	2021-09-30	0	0
FY21 International Data Exchange Maintenance and Enhancements	210421	Complete	7.02	-140	2020-10-01	2021-09-30	0	0
FY21 Patent Exam Center Maintenance and Enhancements	210321	Complete	46.87	-4.4	2020-10-01	2021-09-30	0	0
FY21 PATENT CENTER MAINTENANCE AND ENHANCEMENTS	210121	Complete	16	17	2020-10-01	2021-09-30	0	0
FY21 Patent Administrative Center Maintenance and Enhancements	210221	Complete	28.44	-12	2020-10-01	2021-09-30	0	0
FY21 Patent Business Management Information	210721	Complete	3.82	59	2020-10-01	2021-09-30	0	0
FY22 Patent Business and Content Management Services Maintenance and Enhancements	210622	In Progress	5.84	-23	2021-10-01	2022-09-30	0	0
FY22 Patent Trial and Appeal Case Tracking System	210522	In Progress	5.68	-52	2021-10-01	2022-09-30	0	0
FY22 Patent Administrative Center Maintenance and Enhancements	210222	In Progress	28.55	-11	2021-10-01	2022-09-30	0	0
FY22 Patent Exam Center Maintenance and Enhancements	210322	In Progress	27.92	-31	2021-10-01	2022-09-30	0	0
FY21 Patent Product Line Planning and Management	21A121	Complete	0.68	100	2020-10-01	2021-09-30	0	0
FY21 Patent Business and Content Management Services Maintenance and Enhancements	210621	Complete	5.31	55	2020-10-01	2021-09-30	0	0

Low

Medium

High

Table 2: Activity Details

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
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Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210122	Release 1	Prepare to rollout Patent Center to larger audiences filing in DOCX based on the new fee structure.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	3.64	3.679623	4.16
210122	Release 3	Support Patent Center and DOCX adoption by patent applicants.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		3.64	3.94931	2.75
210122	Release 2	Deploy Patent Center based on the new fee structure for non-DOCX filing.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	3.64	3.53934	3.94
210122	Release 4	Continue to support Patent Center and DOCX adoption by patent applicants.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		3.64	3.679623	0
210422	Release 1	Prepare to deploy of ST.26 new bio-sequence file standard system.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	2.44	3.189343	4.14
210422	Release 2	Deploy ST.26 new bio-sequence file standard system.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	2.44	2.08465	9.22
210422	Release 3	Support the rollout and adoption of the new ST.26 bio-sequence file standard system to the IP patent office community.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		2.44	3.15465	7.14
210422	Release 4	Continue to support the rollout and adoption of the new ST.26 bio-sequence file standard system to the IP patent office community.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		2.44	3.189343	0
210722	Release 1	Deploy enhancements to IQS workflow and reporting capabilities.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	0.72	0.742055	0.4

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210722	Release 2	Deploy additional functionality to support required business reporting, and databases.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	0.72	0.71766	0.79
210722	Release 3	Provide support for operations, maintenance, and technical debt remediation of Patent Business Management Information components.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		0.72	0.71766	0.49
210722	Release 4	Continue to support for operations, maintenance, and technical debt remediation of Patent Business Management Information components.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		0.72	0.742055	0
210521	Release 1	Production Release for FY21 Patent Trial and Appeal Board Center Maintenance and Enhancements for Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	2.57	2.57175	1.57
210521	Release 2	Production Release for FY21 Patent Trial and Appeal Board Center Maintenance and Enhancements for Release 1	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	2.57	2.57175	2.52
210521	Release 3	Production Release for FY21 Patent Trial and Appeal Board Center Maintenance and Enhancements for Release 1	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	2.57	2.57173	1.22

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210521	Release 4	Production Release for FY21 Patent Trial and Appeal Board Center Maintenance and Enhancements for Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	2.57	2.57175	1.48
210421	Release 1	Production Release for FY21 International Data Exchange Maintenance and Enhance	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	1.76	3.45858	4.33
210421	Release 2	Production Release for FY21 International Data Exchange Maintenance and Enhancements	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	1.76	3.40726	4.85
210421	Release 3	Production Release for FY21 International Data Exchange Maintenance and Enhancements for or Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	1.76	3.40723	3.23
210421	Release 4	Production Release for FY21 International Data Exchange Maintenance and Enhancements	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	1.76	3.40725	4.53
210321	Release 1	Adding new Project & Project Activities to the new USPTO Patents Product Line investment	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	11.72	11.41388	15.77
210321	Release 2	Production Release for FY21 Patent Exam Center Maintenance and Enhancements for Release 2	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	11.72	11.41388	9.62

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210321	Release 3	Production Release for FY21 Patent Exam Center Maintenance and Enhancements for Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	11.72	11.41385	12.61
210321	Release 4	Production Release for FY21 Patent Exam Center Maintenance and Enhancements for Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	11.72	11.41389	10.95
210121	Release 1	Production Release for Patents Maintenance and Enhancements for Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	4	4.00075	4.21
210121	Release 2	Production Release for Patents Maintenance and Enhancements for Release 2	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	4	4.00076	3.25
210121	Release 3	Production Release for Patents Maintenance and Enhancements for Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	4	4.00076	4.7
210121	Release 4	Production Release for Patents Maintenance and Enhancements for Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	4	4.00076	1.17
210221	Release 1	Production Release for Patents Administrative Center Maintenance and Enhancements for Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	7.11	5.7775	11.16
210221	Release 2	Production Release Patent Administrative Center Maintenance and Enhancements for Release 2	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	7.11	5.7775	6.95

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210221	Release 3	Production Release Patent Administrative Center Maintenance and Enhancements for Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	7.11	5.77752	7.13
210221	Release 4	Production Release Patent Administrative Center Maintenance and Enhancements for Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	7.11	5.77752	6.68
210721	Release1	Production Release for FY21 Patent Data and Analytics Maintenance and Enhancements for Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.95	0.95451	0.28
210721	Release 2	Production Release for FY21 Patent Data and Analytics Maintenance and Enhancements Release 2	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	0.95	0.9545	0.39
210721	Release 3	Production Release for FY21 Patent Data and Analytics Maintenance and Enhancements Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.95	0.95449	0.51
210721	Release 4	Production Release for PFY21 Patent Data and Analytics Maintenance and Enhancements Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.95	0.95451	0.4
210622	Release 1	Develop functionality to allow for the future deployment of Event Hub, which will replace legacy EAI Hub system.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	1.46	1.46632	1.07

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210622	Release 2	Continue to develop functionality to allow for the future deployment of Event Hub, which will replace legacy EAI Hub system.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	1.46	1.38923	2.97
210622	Release 3	Harden Event Hub functionality prior to initial deployment.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		1.46	1.6682	2.11
210622	Release 4	Deploy initial Event Hub functionality for future replacement of legacy EAI Hub system.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		1.46	1.46632	0
210522	Release 1	Support the newly deployed functionality of AIA case management.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	1.42	1.399262	3.2
210522	Release 2	Continue to support the newly deployed functionality of AIA case management.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	1.42	1.421	2.63
210522	Release 4	Enhance functionality to PTACTS components to increase resiliency and improve the availability of data.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		1.42	1.399262	0
210522	Release 3	Provide operations, maintenance, and technical debt remediation to support PTACTS components.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		1.42	1.42099	1.23
210222	Release 1	Enhance Time, Routing & PAP functionality and integration with other USPTO systems.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	7.14	6.824402	5.68

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210222	Release 2	Deploy additional Time, Routing & PAP functionality and integration with other USPTO systems.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	7.14	6.89761	11.26
210222	Release 3	Support operations and maintenance for Time, Routing & PAP and deploy additional functionality as required.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		7.14	7.86159	9.3
210222	Release 4	Continue to support operations and maintenance for Time, Routing & PAP and deploy additional functionality as required.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		7.14	6.824402	0
210322	Release 1	Expand the rollout of the new Search tool to the Patent Corps.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	6.98	6.967411	8.12
210322	Release 2	Support rollout of the new Search tool to the Patent Corps.	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	6.98	6.98051	14.5
210322	Release 3	Continue to support rollout of the new Search tool to the Patent Corps.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		6.98	6.98055	10.12
210322	Release 4	Complete rollout of the new Search tool to the Patent Corps.	2022-07-01	2022-07-01		2022-09-30	2022-09-30		6.98	6.967411	0
21A121	Release 1	Production Release FY21 Patent Product Line Planning and Management Maintenance and Enhancements for Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.17	0.17088	0

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
21A121	Release 2	Production Release FY21 Patent Product Line Planning and Management Maintenance and Enhancements for Release 2	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	0.17	0.17088	0
21A121	Release 3	Production Release FY21 Patent Product Line Planning and Management Maintenance and Enhancements for Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.17	0.17088	0
21A121	Release 4	Production Release FY21 Patent Product Line Planning and Management Maintenance and Enhancements for Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.17	0.17088	0
210621	Release 1	Production Release for FY21 Patent Business and Content Management Services Maintenance and Enhancements for Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	1.33	1.32749	0.08
210621	Release 2	Production Release for FY21 Patent Business and Content Management Services Maintenance and Enhancements for Release 2	2021-01-01	2021-01-01	2021-01-01	2021-03-31	2021-03-31	2021-03-31	1.33	1.3275	0.24
210621	Release 3	Production Release for FY21 Patent Business and Content Management Services Maintenance and Enhancements for Release 2	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	1.33	1.32748	1.02

Unique Project ID	Activity Name	Activity Description	Planned Start Date	Projected Start Date	Actual Start Date	Planned Completion Date	Projected Completion Date	Actual Completion Date	Planned Total Cost (\$M)	Projected Total Cost (\$M)	Actual Total Cost (\$M)
210621	Release 4	Production Release for FY21 Patent Business and Content Management Services Maintenance and Enhancements Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	1.33	1.3275	1.06

Table 3: Project Related Details
<div><div>FY22 Patent Center Maintenance and Enhancements</div><div><div>1. Are information technology investments adequately implementing incremental development methodology? (Y/N)</div><div>Yes</div></div><div><div>2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)</div><div>Weeks</div></div><div><div>3. Please describe the iterative development methodology being employed. (500 characters or less)</div><div>Agile Methodology/DevSecOps</div></div></div> <div><div>FY22 International Data Exchange Maintenance and Enhancements</div><div><div>1. Are information technology investments adequately implementing incremental development methodology? (Y/N)</div><div>Yes</div></div><div><div>2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)</div><div>Weeks</div></div><div><div>3. Please describe the iterative development methodology being employed. (500 characters or less)</div><div>Agile methodology/DevSecOps</div></div></div> <div><div>FY22 Patent Business Management Information</div><div><div>1. Are information technology investments adequately implementing incremental development methodology? (Y/N)</div><div>Yes</div></div><div><div>2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)</div><div>Weeks</div></div></div>

3. Please describe the iterative development methodology being employed. (500 characters or less)

Agile methodology

FY21 Patent Trial and Appeal Case Tracking System

1. Are information technology investments adequately implementing incremental development methodology? (Y/N)

Yes

2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)

Weeks

3. Please describe the iterative development methodology being employed. (500 characters or less)

Agile Methodology/Dev Sec Ops

FY21 International Data Exchange Maintenance and Enhancements

1. Are information technology investments adequately implementing incremental development methodology? (Y/N)

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Weeks

3. Please describe the iterative development methodology being employed. (500 characters or less)

Agile methodology / Dev Sec Ops

FY21 Patent Exam Center Maintenance and Enhancements

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Yes

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Agile Methodology/ Dev Sec Ops

FY21 PATENT CENTER MAINTENANCE AND ENHANCEMENTS

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Yes

2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)

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Agile Methodology/ Dev Sec Ops

FY21 Patent Administrative Center Maintenance and Enhancements

1. Are information technology investments adequately implementing incremental development methodology? (Y/N)

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2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)

Weeks

3. Please describe the iterative development methodology being employed. (500 characters or less)

Agile methodology/DevSecOps

FY21 Patent Business Management Information

1. Are information technology investments adequately implementing incremental development methodology? (Y/N)

Yes

2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)

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Agile Methodology

FY22 Patent Business and Content Management Services Maintenance and Enhancements

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Agile methodology

FY22 Patent Trial and Appeal Case Tracking System

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Agile methodology/DevSecOps

FY22 Patent Administrative Center Maintenance and Enhancements

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Agile methodology/DevSecOps

FY22 Patent Exam Center Maintenance and Enhancements

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Agile methodology/DevSecOps

FY21 Patent Product Line Planning and Management

1. Are information technology investments adequately implementing incremental development methodology? (Y/N)

2. What is the frequency of incremental development iterations? (ex. 1 month, 3 months, 6 months, 12 months or greater)

3. Please describe the iterative development methodology being employed. (500 characters or less)

FY21 Patent Business and Content Management Services Maintenance and Enhancements

1. Are information technology investments adequately implementing incremental development methodology? (Y/N)

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Agile Methodology

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