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Business Case

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Section A: Investment Summary Information

Investment Name	Unique Investment Identifier
USPTO Enterprise Business Product Line	006-000805700

Investment Description

This is a collection of 9 products used across the agency and by the public. EBPLs purpose is to manage all of the back office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets.

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	
Financial Management, Human Resources, Other		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: - Stabilize tools and capabilities of legacy systems will allow critical business functions to continue as they are essential for our business process and the reputation of the USPTO - Address internal and external stakeholder experiences, priorities, and expectations related to quality and application complexity - Ensure highest level of quality for all work products - Utilize AI tools and capabilities to assist internal business partners meet business goals.

Section C: Investment and Contracts

Contracts

- [1333BJ21F00280035](#)
- [1333BJ18F00280061](#)
- [1333BJ21F00280025](#)
- [1333BJ20P00280014](#)
- [1333BJ21F00280044](#)
- [1333BJ21F00280042](#)
- [1333BJ21F00280037](#)
- [1333BJ20F00280005](#)
- [1333BJ21F00282015](#)
- [1333BJ21F00002010](#)
- [1333BJ21F00283005](#)
- [1333BJ18F00285021](#)
- [1333BJ20F00005003](#)
- [1333BJ21F00280060](#)
- [1333BJ20F00284007](#)
- [1333BJ21F00280046](#)
- [1333BJ21F00184004](#)
- [1333BJ18F00182001](#)
- [1333BJ21F00184002](#)
- [1333BJ19C00280004](#)
- [1333BJ20F00000002](#)
- [1333BJ21F00184011](#)
- [1333BJ20F00182004](#)
- [1333BJ21F00002009](#)
- [1333BJ18F00002003](#)
- [1333BJ20F00280038](#)
- [1333BJ21F00184008](#)
- [1333BJ21F00184010](#)
- [1333BJ21F00280065](#)
- [1333BJ18F00285010](#)
- [1333BJ19F00274011](#)
- [1333BJ21F00180002](#)
- [1333BJ22F00182003](#)
- [1333BJ21F00281007](#)
- [1333BJ20F00282008](#)
- [1333BJ20F00282049](#)
- [1333BJ20P00280013](#)
- [1333BJ20P00282005](#)
- [1333BJ21F00182003](#)
- [1333BJ21F00183004](#)
- [1333BJ21F00183001](#)
- [1333BJ22F00282011](#)

- [DOC50PAPT1720052](#)
- [1333BJ21P00280003](#)
- [1333BJ19F00013001](#)
- [1333BJ18F00283016](#)
- [1333BJ20F00182001](#)
- [1333BJ20F00280061](#)
- [DOC44PAPT1711156](#)
- [1333BJ20P00282004](#)
- [1333BJ19P00281001](#)
- [1333BJ21F00002016](#)
- [1333BJ20P00280009](#)
- [1333BJ21P00281005](#)
- [1333BJ21P00220001](#)
- [1333BJ22F00280012](#)
- [DOC40PAPT1711118](#)

Section D: Historic CIO Rating



CIO Rating	Date	Comments
4	Jun 28, 2022	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Selected Accomplishments: Completed 60% of cloud formation/autoscaling work for www.uspto.gov. Completed 88% of fee mgt migration to AWS. For www.uspto.gov enhanced subscription center page, created new moderation states for web approval, created new template for content with prominent images. Completed 27% of Google analytics enhancements to PTOWeb to better understand user engagement patterns. Completed 20% of development for top 5 reports for Certified Copy and Assignments (CCA). For PTO Web improved CMS capabilities by adding revision logs and preventing simultaneous editing. Implemented editorial workflow. Retired Deskflex for Property and Facility Mgt and closed all Picture Archiving and Communication System (PACS) concerns. Completed required Operations and Maintenance activities to ensure products are available, functional, and secure for end users. Completed 43 deployments; majority via Automated DevSecOps pipeline. Progressing with some reporting issues.

CIO Rating	Date	Comments
4	May 31, 2022	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Selected Accomplishments: Increased cloud presence contributing to reduction in outyear ops and maintenance by continuing EBT on-premise migration to Oracle's Cloud Enterprise Performance Mgt (EPM) Planning SaaS offering, www.uspto.gov migration to the cloud, Fee Mgt migration to AWS database engine that combines speed and reliability. Enhancements contributing to End/User Customer Experience entailed Pre-Beta MVP for PTO Web, Google analytics enhancements to PTOWeb to better understand user engagement patterns, development for top 5 reports for Certified Copy and Assignments (CCA), certification assignment management capabilities for CCA and KPI application and reporting tool (FEDMT) to align KPIs with key business objectives while retaining legacy KPI operational measures. Progressing with some reporting issues.
4	Apr 27, 2022	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Selected Accomplishments: Completed Patent Trial and Appeal Case Tracking System (PTACTS) integration with MyUSPTO and Okta. Completed integration between Information Technology Rosters and Resources Database (ITRR) and IT Budget Formulation (ITBF) tools to reduce administrative capacity required for the IT Planning process. Completed redesign of Budget CAPS in ITBFT increasing flexibility to set individual product caps. Completed requirements gathering for top 5 Minimum Viable Product (MVP) reports for Certified Copy and Assignments. Completed 8 deployments. Progressing with some reporting issues.
4	Mar 29, 2022	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Selected Accomplishments: Completed UX definition for PTO Web MVP. Completed upgrade of PTAS server operating systems. Completed RBAC to OKTA migration for OEDIS CORE, RSP, CCX Drupal for WWW and PTOWeb. Completed Fee Management Product maintenance. Commenced Financial Manager upgrade to NG8 3 percent completed. Completed ITSM replacement with ServiceNow. Completed replacement and modernization of TDXF daily jobs which provides daily TM files to the public with BDR. Completed COOP upgrade on Windows 2016 servers. Progressing with some reporting issues.
4	Feb 25, 2022	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Selected Accomplishments: Completed UX definition for PTO Web MVP. Completed upgrade of PTAS server operating systems. Completed RBAC to OKTA migration for OEDIS CORE, RSP, CCX Drupal for WWW and PTOWeb. Completed Fee Management Product maintenance. Commenced Financial Manager upgrade to NG8 3 percent completed. Completed ITSM replacement with ServiceNow. Completed replacement and modernization of TDXF daily jobs which provides daily TM files to the public with BDR. Completed COOP upgrade on Windows 2016 servers. Progressing with some reporting issues.
4	Jan 27, 2022	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Accomplishments: Completed RBAC to OKTA migration for WWW, PTO Web. Deployed CCC Release 4.6 and retire OEMS. Deployed new micro-service for IFT Outbound Fee Mgt component. TTAB Center - Notice of Opposition - setup pricing rules. Implemented data migration from on-prem EBT solution to cloud SaaS solution and cutover to decommission OBIEE. Completed UX redesign of Practitioner Requests for OEDIS. Finalized ITS Payment entry BOT requirements. Transitioned servers for new facilities and operations components coming into investment from Patents Product line. Number of deployments: 62. Progressing with some reporting issues.
4	Nov 30, 2021	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Accomplishments: Completed: RBAC to OKTA migration for EDMS, Concur, OEDIB, RSP, LMS and enhanced security and compatibility. Delivery of 33% functionality for Certified Copy Center (CCC) to retire OEMS by 12/31/21. Self Service Portal user interface prototype and developed initial reports for BDR. ETIS development to enable patents organization to close PTES at 12/31 end of life. Automation of two fee management processes for cleanup of orphan records and daily monitoring. Development of De-Obligation Modification and Concur attachment BOTs. Deployment of NOSP 2.0 to production.
4	Oct 27, 2021	Enterprise Product Line continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Accomplishments - CCX Implemented new widget for ID Proofing, made portal changes, and provided TEAS with ability to update user information. Decommissioned OBIEE. Completed annual cutover of OPB applications. Data & Analytics Completed BDR releases for TEAS, CPC CAT. For FEDMT deployed BU Spend MVP and enhancements to OPB Spend and Procurement Plans. Fee Mgt Continued customer requested enhancements development and testing. Implemented ACH Credit and FPP admin capabilities. Migrated rules mgt, TSP DB to AWS. Financial Mgt Conducted automated procurement plan pilot. Deployed Vendor Portal V1.5, CARS treasury BOT and ITS BOT. Legal Tools Deployed OEDIS CI/CORE Suite (online registration processing, CLE tracking, UX redesign). People Management For Paycheck 8, completed Sprint 9 and finalized deployment schedule.

CIO Rating	Date	Comments
4	Sep 29, 2021	EBPLs continues to manage all of the back-office operations including communicating with the public and employees, providing usable data collections and analytics, disseminating public records including assignment records, collecting fees, paying agency bills, supporting legal functions, providing HR capabilities, supporting budget and planning, and managing facilities and assets. Accomplishments: Executed DevSecOps pipeline to deploy products faster. Migrated products to the cloud for resiliency and reduce total life cycle costs. Completed 3+ Robotic Process Automation (RPA) implementation and deployed unattended BOTS generating >171 hours/yr in savings. Automated correspondence mailing process. Added 100+ vendors to electronic vendor portal invoicing solution. Data Analytics: Expanded data sources into the Enterprise DataWarehouse. Implemented innovative machine learning models.

Data Last Updated On: 06/30/2022

Section E: Investment Spending

Table 1: Distribution by Spending Type			
Spending Type	PY 2021	CY 2022	BY 2023
DME Costs	44.9162	47.093557	48.573644
O&M Costs	52.818807	58.775595	59.814088
Total	97.735007	105.869152	108.387732

Table 2: Distribution by Cost Pools			
Cost Pools	PY 2021	CY 2022	BY 2023
Internal Labor	30.570481	34.187522	36.954862
External Labor	53.433866	57.65791	57.56856
Outside Services	3.99223	3.46508	3.46508
Hardware	0.36433	0.79232	0.89291
Software	9.16501	9.284	8.95279
Facilities & Power	0	0	0
Telecom	0	0	0
Other	0.20909	0.48232	0.55353
Internal Services	0	0	0
Totals	97.735007	105.869152	108.387732

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	3.945998	4.306811	4.560964
Network	0	0	0
Data	0	0	0
Compute	0	0	0
Storage	0	0	0
End User	9.277404	9.684772	9.720008
Output	12.977791	14.917925	15.742081
Application	58.377326	57.666586	59.383495
Delivery	1.99684	2.357729	2.587
Platform	11.159648	16.935329	16.394184

IT Tower	PY 2021	CY 2022	BY 2023
Data Center	0	0	0
Totals	97.735007	105.869152	108.387732

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)
FY21 Data and Analytics Maintenance and Enhancements	230821	Complete	17.59	-33	2020-10-01	2021-09-30	0	0
FY22 Property and Facility Management Maintenance and Enhancements	230622	In Progress	2.61	50	2021-10-01	2022-09-30	0	0
FY21 Property and Facility Management Maintenance and Enhancements	230621	Complete	1.17	-100	2020-10-01	2021-09-30	0	0
FY21 Financial Management Maintenance and Enhancements	230321	Complete	3.46	-41	2020-10-01	2021-09-30	0	0
FY21 Communication and Customer Experience Maintenance and Enhancements	230121	Complete	4.09	-25	2020-10-01	2021-09-30	0	0
FY21 Enterprise Business Product Line Planning and Management Maintenance and Enhancements	23A121	Complete	1.62	-0.002	2020-10-01	2021-09-30	0	0
FY21 People Management Maintenance and Enhancements	230521	Complete	4.47	-91	2020-10-01	2021-09-30	0	0
FY22 Data and Analytics Maintenance and Enhancements	230822	In Progress	8.55	-53	2021-10-01	2022-09-30	0	0
FY22 Financial Management Maintenance and Enhancements	230322	In Progress	4.5	17	2021-10-01	2022-09-30	0	0
FY22 Planning, Budgeting and Governance Maintenance and Enhancements	230422	In Progress	4.65	-1.2	2021-10-01	2022-09-30	0	0
FY21 Legal Tools Maintenance and Enhancements	230721	Complete	1.61	-58	2020-10-01	2021-09-30	0	0
FY22 People Management Maintenance and Enhancements	230522	In Progress	3.13	24	2021-10-01	2022-09-30	0	0
FY22 Certified Copy and Assignments Maintenance and Enhancements	230922	In Progress	15.15	29	2021-10-01	2022-09-30	0	0
FY22 Legal Tools Maintenance and Enhancements	230722	In Progress	0.94	-95	2021-10-01	2022-09-30	0	0
FY21 Dissemination and Assignments Maintenance and Enhancements	230921	Complete	5.69	-60	2020-10-01	2021-09-30	0	0

Project Name	Project UID	Status	Project Life Cycle Cost (\$M)	Cost Variance (%)	Start Date	End Date	Schedule Variance (%)	Schedule Variance (Days)
FY21 Planning, Budgeting and Governance Maintenance and Enhancements	230421	Complete	4.06	-50	2020-10-01	2021-09-30	0	0
FY21 Fee Management Maintenance and Enhancements	230221	Complete	3.76	-9.3	2020-10-01	2021-09-30	0	0
FY22 Fee Management Maintenance and Enhancements	230222	In Progress	2.83	-16	2021-10-01	2022-09-30	0	0
FY22 Communication and Customer Experience Maintenance and Enhancements	230122	In Progress	4.1	4	2021-10-01	2022-09-30	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)
230821	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	4.4	4.397638	2.43
230821	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	4.4	4.397638	2.99
230821	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	4.4	4.397638	2.07
230821	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	4.4	4.397638	3.45
230622	Release 1 (12 week timebox)	Implement eRecords compliance solution	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	0.65	0.651682	0
230622	Release 2 (12 week timebox)	Room reservation system expansion and potential consolidation	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	0.65	0.651682	0
230622	Release 4 (12 week timebox)	O&M for COOP, ENS, e-Records	2022-07-01	2022-07-01		2022-09-30	2022-09-30		0.65	0.651682	0
230622	Release 3 (12 week timebox)	Implement Emergency Notification System Mobile App	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		0.65	0.651682	0
230621	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.29	0.293648	0
230621	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	0.29	0.293648	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)
230621	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.29	0.293648	0
230621	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.29	0.293648	0
230321	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.87	0.865498	0.28
230321	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	0.87	0.865498	0.49
230321	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.87	0.865498	0.94
230321	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.87	0.865498	0.51
230121	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	1.02	1.02125	0.72
230121	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	1.02	1.02125	0.44
230121	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	1.02	1.02125	0.47
230121	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	1.02	1.02125	0.76
23A121	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.41	0.40606	0.41
23A121	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	0.41	0.40606	0.41
23A121	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.41	0.40606	0.41
23A121	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.41	0.40606	0.41
230521	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	1.12	1.1179	0.06
230521	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	1.12	1.1179	0.03

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)
230521	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	1.12	1.1179	0.02
230521	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	1.12	1.1179	0.1
230822	Release 1 (12 week timebox)	Update Metadata Tool to Support New Database Technologies, EDW create organizational, business and Performance Metrics for Data Driven Dashboard	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	2.14	2.136318	3.65
230822	Release 2 (12 week timebox)	Review/Update CORPORATE Data Catalog, RBAC to OKTA Migration for FEDMT, EDW - SAP Business Objects and Data services HW/SW Upgrade,	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	2.14	2.136318	5.18
230822	Release 3 (12 week timebox)	Implement ZeroTrust Architecture, Provide Data to DOC Data Warehouse, IDP Admin (IDPADMIN) Application Enhancements	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		2.14	2.136318	4.69
230822	Release 4 (12 week timebox)	IDP Admin Architecture enhancements	2022-07-01	2022-07-01		2022-09-30	2022-09-30		2.14	2.136318	0
230322	Release 1 (12 Week Timebox)	Complete OKTA Migration for Concur, complete momentum upgrade, remediate POAMS for ACQ and VP	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	1.12	1.123961	0.7
230322	Release 2 (12 Week Timebox)	Implement RPA for O&M tasks, Retire SQR, automate ACQ Contract closeout process	2022-01-03	2022-01-03	2022-01-03	2022-03-31	2022-03-31	2022-03-31	1.12	1.123961	0.79

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)
230322	Release 3 (12 Week Timebox)	Complete DUNS to UEI replacement, Implement Momentum Payroll module, ACQ 1.13.0 Release	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		1.12	1.123961	0.35
230322	Release 4 (12 Week Timebox)	Provide data to DOC Datawarehouse, Implement RPA for O&M tasks, Upgrade VP 10 1.8	2022-07-01	2022-07-01		2022-09-30	2022-09-30		1.12	1.123961	0
230422	Release 1 (12 Week Timebox)	Operate and maintain ABIS, Decommission OBIEE, Migrate BU, OPB Spend Plan and ITBFT, OBIEE migration to Oracle Analytics Server 5.9.0	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	1.16	1.162973	0.88
230422	Release 2 (12 Week Timebox)	Operate and maintain ABIS, Implement EBT Infrastructure and application maintenance, patching and upgrade	2022-01-03	2022-01-03	2022-01-03	2022-03-31	2022-03-31	2022-03-31	1.16	1.162973	1.5
230422	Release 3 (12 Week Timebox)	Operate and maintain ABIS, EBT Customer Support and implement EBT Infrastructure and application maintenance, patching and upgrade	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		1.16	1.162973	0.91
230422	Release 4 (12 Week Timebox)	Operate and maintain ABIS, EBT Customer Support and implement EBT Infrastructure and application maintenance, patching and upgrade	2022-07-01	2022-07-01		2022-09-30	2022-09-30		1.16	1.162973	0
230721	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.4	0.4015	0.64
230721	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	0.4	0.4015	0.57
230721	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.4	0.4015	0.6

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)
230721	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.4	0.4015	0.17
230522	Release 1 (12 week timebox)	Implement ETIS pre-integration modifications, Complete HRC upgrade	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	0.78	0.782972	0.25
230522	Release 2 (12 week timebox)	Complete HRC update, decommission HRC reporting database, Implement LMS data feeds/reports	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	0.78	0.782972	0.56
230522	Release 3 (12 week timebox)	Complete HRC March release, Privileged user audit update, and training	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		0.78	0.782972	0.34
230522	Release 4 (12 week timebox)	Complete June release, HRC - July Privileged User Internal Recertification	2022-07-01	2022-07-01		2022-09-30	2022-09-30		0.78	0.782972	0
230922	Release 2 (12 week timebox)	CCC PDF Signing, CCC Rimage DVD integration	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	3.79	3.787718	1.6
230922	Release 1 (12 week timebox)	CCC Trademark and Patent Integration, CCC process, format, and deliver docs, Upgrade PTAS servers	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	3.79	3.787718	1.52
230922	Release 4 (12 week timebox)	Retire OEMS, UPWS and CCC Production Maintenance	2022-07-01	2022-07-01		2022-09-30	2022-09-30		3.79	3.787718	0
230922	Release 3 (12 week timebox)	CCC production operations	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		3.79	3.787718	0.82
230722	Release 1 (12 week timebox)	Complete OKTA Migration for OEDIB, Deliver Cloud LDMS solution to users. Implement OEDIS register and pay Form 275	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	0.24	0.235545	0.5
230722	Release 2 (12 week timebox)	Remediate Security Vulnerabilities & POAMs, Implement OEDIS register and pay Form 158a	2022-01-01	2022-01-01	2022-01-01	2022-03-31	2022-03-31	2022-03-31	0.24	0.235545	0.87

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)
230722	Release 4 (12 week timebox)	OEDIS O&M	2022-07-01	2022-07-01		2022-09-30	2022-09-30		0.24	0.235545	0
230722	Release 3 (12 week timebox)	EDSS procurement of new SaaS product, OEDIS implement core application processing	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		0.24	0.235545	0.43
230921	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	1.42	1.4235	1.57
230921	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	1.42	1.4235	1.14
230921	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	1.42	1.4235	0.84
230921	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	1.42	1.4235	0.57
230421	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	1.02	1.015703	1.09
230421	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	1.02	1.015703	0.21
230421	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	1.02	1.015703	0.09
230421	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	1.02	1.015703	0.64
230221	Release 1 (12 Week Timebox)	Release 1	2020-10-01	2020-10-01	2020-10-01	2020-12-31	2020-12-31	2020-12-31	0.94	0.940128	0.77
230221	Release 2 (12 Week Timebox)	Release 2	2021-01-04	2021-01-04	2021-01-04	2021-03-31	2021-03-31	2021-03-31	0.94	0.940128	0.3
230221	Release 3 (12 Week Timebox)	Release 3	2021-04-01	2021-04-01	2021-04-01	2021-06-30	2021-06-30	2021-06-30	0.94	0.940128	0.25
230221	Release 4 (12 Week Timebox)	Release 4	2021-07-01	2021-07-01	2021-07-01	2021-09-30	2021-09-30	2021-09-30	0.94	0.599	0.85
230222	Release 1 (12 Week Timebox)	Audit Support, O&M for Fee maintenance product, implement help desk support	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	0.71	0.707843	0.66

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)
230222	Release 2 (12 Week Timebox)	O&M for Fee maintenance product, deliver help desk support	2022-01-03	2022-01-03	2022-01-03	2022-03-31	2022-03-31	2022-03-31	0.71	0.707843	1.2
230222	Release 3 (12 Week Timebox)	O&M for Fee maintenance product, deliver help desk support	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		0.71	0.707843	0.24
230222	Release 4 (12 Week Timebox)	O&M for Fee maintenance product, deliver help desk support	2022-07-01	2022-07-01		2022-09-30	2022-09-30		0.71	0.707843	0
230122	Release 1 (12 Week Timebox)	Implement integration with OKTA services, replacing RBAC services using Oracle IAM for MyUSPTO, and PTO Web.	2021-10-01	2021-10-01	2021-10-01	2021-12-31	2021-12-31	2021-12-31	1.02	1.023891	0.67
230122	Release 2 (12 Week Timebox)	Implement PTO Web Operations and Maintenance	2022-01-03	2022-01-03	2022-01-03	2022-03-31	2022-03-31	2022-03-31	1.02	1.023891	1.22
230122	Release 3 (12 Week Timebox)	Implement OKTA for Image Gallery.	2022-04-01	2022-04-01	2022-04-01	2022-06-30	2022-06-30		1.02	1.023891	0.72
230122	Release 4 (12 Week Timebox)	Implement PTO, MyUSPTO, Web Operations and Maintenance	2022-07-01	2022-07-01		2022-09-30	2022-09-30		1.02	1.023891	0

Table 3: Project Related Details**FY21 Data and Analytics Maintenance and Enhancements**

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/DevSecOps**FY22 Property and Facility Management Maintenance and Enhancements**

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/DevSecOps

FY21 Property and Facility Management Maintenance and Enhancements

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/DevSecOps

FY21 Financial Management Maintenance and Enhancements

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/DevSecOps

FY21 Communication and Customer Experience Maintenance and Enhancements

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/DevSecOps

FY21 Enterprise Business Product Line Planning and Management Maintenance and Enhancements

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 People Management Maintenance and Enhancements

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/DevSecOps
-

FY22 Data and Analytics Maintenance and Enhancements

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/DevSecOps
-

FY22 Financial Management Maintenance and Enhancements

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/DevSecOps
-

FY22 Planning, Budgeting and Governance Maintenance and Enhancements

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/DevSecOps

FY21 Legal Tools Maintenance and Enhancements

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/DevSecOps

FY22 People Management Maintenance and Enhancements

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/DevSecOps

FY22 Certified Copy and Assignments Maintenance and Enhancements

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/DevSecOps

FY22 Legal Tools Maintenance and Enhancements

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/DevSecOps

FY21 Dissemination and Assignments Maintenance and Enhancements

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 DevSecops

FY21 Planning, Budgeting and Governance Maintenance and Enhancements

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/DevSecOps

FY21 Fee Management Maintenance and Enhancements

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/DevSecOps

FY22 Fee Management Maintenance and Enhancements

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/DevSecOps

FY22 Communication and Customer Experience Maintenance and Enhancements

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/DevSecOps

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