

Open Forum with USPTO Management, 21 March 2016  
Minutes compiled by John Schlipp, Secretary, PTRCA

Meeting opened by Christine Kitchens at 3:10PM. Chris served as moderator and introduced the following USPTO management panelists:

Christine Kitchens – Director Office of the Chief Information Officer (OCIO),  
Public Search Services Division;  
Donna Cooper – Director OCIO, Public Records Division; (former PTRC rep L.A.)  
Jeremy Idol – Director OCIO, Electronic Information Products Division; and  
Randy Hill – Director OCIO, Collaborative Services Division (USPTO web sources).

Q1/A1 (Left-over from last year's Forum) Referred to handout of URLs. From David Williams (Chief Website Manager) prepared listing of uspto.gov URL with marketing new name (shorter URL) requests. The handout reveals those renamed URLs highlighted in green and those pending in yellow. 10 suggestions were not implemented due to confusion with other PTO web pages. Several were implemented as requested. Majority of the 57 had minor modifications. David reported to Chris that this request helped to review the process all at one time. From this point forward the web group has standardized the process with Camel Case for marketing URLs. In Camel Case the words are not separated with hyphens. David has reported to Chris that marketing URLs are treated specially as case insensitive, while content URLs are case sensitive. Camel Case does not require a differentiation between upper case or lower case. Those pages that are content related will be forwarded onto the to the Web Executive Council and then forwarded to each owner of such sites, e.g. PTRCP.

Q2 Leena Lalwani (Index Card Q) – ORCID use for inventors? This is like an ISBN for people. See [www.orcid.org](http://www.orcid.org) for details. Some grant and journal publications are requiring this.

A2 Christine Kitchens – Chris Leithiser of the USPTO reviewed with the appropriate parties at the USPTO to see how and if this would fit in at the USPTO. He reported that the USPTO parties were aware of it but did not see this on the immediate horizon by the USPTO anytime soon.

Q3 Jim Miller (Index Card Q) – Any plans for access to beta site for bulk data?

A3 Christine Kitchens – Reported that Chris Leithiser – Information Technology Specialist OCIO, Electronics Information Products Division, will cover this in his presentation about PAIR Bulk Data at this seminar tomorrow.

Q4 (Unknown Index Card Requester not reported by Christine) Would it be possible in the Advanced Search mode to add “current” to USPTO classification field tag?

A4 Christine Kitchens – Chris will look into this further with the appropriate party.

Q5 Marian Armour-Gemmen – Reported delays in her customers getting replies from the Pro Bono program for her state.

A5 Christine Kitchens replied that she should bring up this question with John Kirkpatrick, presenter tomorrow for the Patent Pro Bono service.

Q6 Marian Armour-Gemmen – Expressed access challenges with JAVA plug-in on PubEAST from her location.

A6 Christine Kitchens asked if she had conferred with USPTO IT to trouble shoot. She reminded everyone to call in with the PubEAST help desk if this continues. Also, get a ticket number with their IT Help Desk and then let the PTRCP office know about it to further assist.

Q7 Marian Armour-Gemmen – Reported her challenges in teaching her customers to patent search with CPC classes via the USPTO site. She finds it easier to show customers how to find CPC classes with the Espacenet site. Asked if there were any plans to simplify the USPTO site?

A7 Christine Kitchens – Has learned that PTO patent examiners are using Espacenet site also for CPC class searching.

Q8 Stella Mittelbach – What is the future viability of Design Patent USPC classes? I also like the online training modules. Any plans for an online training module for searching for Design Patents?

A8 Tom Turner – Reported that until we are told otherwise, we should continue to use USPC classes for Design and Plant patents. Planning to create 7 Step Guide for this application.

Q9 Barbara Hampton – There is a need for a simplified handout to show customers how to obtain and qualify for patent application discounts for small or micro entities. Information on website is complicated and needs to be expressed in an easier to read format which summarizes this.

A9 Christine Kitchens suggested that PTRCs in the field design and create such a guide. The PTRCP office would be pleased to review the document as it is being developed by PTRCs.

Q10 Jim Miller – The USPTO “CPC scheme” search box now searches the CPC Manual with keywords. This is an option for us if we want to limit to just words in the scheme itself, for example to get back to a section of the CPC scheme that we are already partly familiar with. (Espacenet classification searching does not allow limiting to just the manual - it searches words only in patents, and ranks CPC results)

A10 Christine Kitchens thanked Jim for the suggestion.

Q11 Charlotte Erdmann – Conveyed concern about John Owens discussion earlier in the day about PTO’s need to be sensitive to customers’ confidentiality on correspondences with PTO. Would this affect availability of Public PAIR and Patent Applications?

A11 Christine Kitchens replied that she believed John Owens discussion dealt more with confidentiality issues with the Cloud and not the online public resources such as Public PAIR and Patent Applications.

Q12 Kenneth Johnson – Need for more training about Design Patents at future conferences, e.g. differences between US Design Patents versus how other countries handle such design intellectual properties.

A12 Christine Kitchens thanks Kenneth for this suggestion and said it would be explored for future programs.

Q13 Missy Murphy – Topic USPC to CPC to IPC class concordance charts. Are there any plans for a reverse concordance to convert from CPC to USPC classes? Reverse cross-walk format?

A12 Christine Kitchens is not aware of anything but she will take this suggestion to the CPC folks.

Q14 Chuck Malone – Is there a way to access contacts from Patent Attorney/Agents database with those who are open for business with the general public? Some contacts listed are for onsite corporate attorneys of private companies that do not do business with the general public.

A14 Christine Kitchens will take this idea back to the people who are in charge of the roster.

Q15 John Meier – In regard to same situation noted above, but for academic faculty who are registered attorneys or agents.

A15 Christine Kitchens thanks John for noting this other non-public access contact type and would include this in the same feedback to the attorney/agent roster listing. Then Randy Hill (panelist) added how his Collaborative Services Division has challenges in building mobile device apps for patent information such as the attorney/agent contacts listing. They have been working on similar apps for citations in information, etc.

Q16 Paula Johnson – Suggested ORCID for database content mentioned above.

A16 Christine noted that as always funding and scheduling budgets for such applications must be considered. The PTO budget cycle is 2 years out and could take up to 3 years.

Q17 Connie Wu – Felt that the new CPC Seven Step Search Strategy was too wordy with too much content narrative. It should be more bulleted step by step.

A17 Christine Kitchens reminded Connie that the Seven Step Guide has always been a collaborative effort between PTRCs and the PTRCP office. Chris thanked her for the suggestion and said she would be following up with her for more feedback.

Q18 Chuck Malone – Regarding Patents End-to-End (new public patents search template forthcoming), plans for simple Google-style search template and advanced PubEAST-style search template. Asked if there are any plans for an intermediate

search template.

A18 Christine Kitchens agreed and said they would see if demos of forthcoming search templates could be shared with PTRCs in the future for such feedback.

Q19 Barbara Hampton – Regarding ORCID discussed earlier, need for identifiers such as inventor name.

A19 Christine Kitchens agreed with her suggestion.

Q20 Charlotte Erdmann – On same topic, noted a workshop posted recently about disambiguation to look at for fun.

A20 Christine Kitchens thanked her and replied that it sounded interesting and asked Leena more about ORCID. ORCID identifiers may only be requested for current living people.

Q21 Jim Miller – Public Pair Image file wrappers are often different from file history.

A21 Christine Kitchens asked that Jim capture screenshot examples to share with them for future follow-up.

Q22 Connie Wu – Any plans for a translation feature on USPTO patent database site similar to what Espacenet offers?

A22 Christine Kitchens has not heard any plans for this with the USPTO site. Jim Miller reminded all that John Owens had said something about machine translations earlier.

Q23 Kenneth Johnson – Asked that each panelist review what they do in their areas:

Donna Cooper – Director OCIO, Public Records Division

Introduced new Patent Assignments Tool in September 2014. New release soon (April 2016 goal) featuring export print and quick look-up features. Trademark version planned for May/June 2016. Summer plans to review problems/bugs, etc.

Jeremy Idol – Director OCIO, Electronic Information Products Division

Reorganizing Bulk Data; consolidating making available most PTO hosted data; updating and modernizing ingestion systems; streamlining and bringing up-to-date.

Randy Hill – Director OCIO, Collaborative Services Division

Includes PTO conference rooms and booths, electronics management, website: employee and external sites, and some special servers. Working on new Share Point website. Making certain that all sites work properly; not responsible for content.

Christine Kitchens relayed that she appreciated everyone's questions and comments. She would look into unanswered items for future reference. She wrapped up the meeting at 4:15PM.