

office
of the **Chief Information Officer**

CIO's Desk IT Investment & Planning IT Development IT Operations OCIO Admin OCIO Org Biz Customers

Search Site

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[Communication Initiatives Announcements](#)
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CIO Business Customers

The new Business Customer section is under development. More information will be available soon.
[READ MORE...](#)

Support Info

- [IT Support Website](#)
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- [Help Desk Info](#)
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- [Services Level Agreements](#)
- [IT Security Training](#)
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- [Microsoft Home Use Program](#)

OCIO Mission

To enable the success of the USPTO with information and technology services through cooperation with our business partners.

OCIO Vision**OCIO Values****Communications Initiatives**

Announcements:

- [Transformation Roadmap Logos](#)
- [New OCIO Policy on Policies](#)
- [READ MORE...](#)

CIO Site Survey**Suggestions**

Help us improve our website!

[OCIO Website Suggestion Form](#)

Overview

Welcome to the OCIO Intranet Website!

Visit the [OCIO Communications Initiatives Main Page](#) for announcements regarding OCIO IT projects, activities and events. The OCIO Communication Initiatives Main Page provides a central location for posting notices of important OCIO activities. For your convenience, new Communication Initiatives Announcements are listed below (left-hand sidebar). Email [OCIO Communications](#) to submit an announcement request.

Navigating the OCIO Intranet Website

The OCIO website is organized by subject matter within the respective business process areas. Business Customer information, OCIO Administrative information and communiqués from the CIO are also available.

All content is available via the [Global Navigation Menu](#) (Gold Bar above). For an alphabetical listing of OCIO website content by subject matter, please see the [Topic Index](#). For your convenience, IT Support Links are located in the left-hand sidebar. Visit the OCIO customer [IT Support Website](#) for additional IT support information.

Resource Links ... Accessing frequently used content

The "What's New" notices listed below (First Tab) provide information regarding recent OCIO Website changes. The other 3 Tabs below provide an easy way to access some often used OCIO IT resources.

What's New

IT Investment & Planning

IT Development

IT Operations

What's New**[04/15/2009] IT Investment Other Section and Biz Communications Section Updated**

View the updated [IT Investment Other Section](#) and the [Biz Communications Page](#).

[04/14/2009] IT Security Section Updated

View the updated IT Security Section [content updates contacts](#).

[04/14/2009] OCIO Org Section Updated

View the updated [OCIO Org](#) information.

[04/14/2009] SDLC Section Updated

View the updated [Artifacts](#) within the SDLC section.

[04/10/2009] CM Build Section Updated

View the updated [CM Build Reports](#) located in the Configuration Management Section.

[04/10/2009] ITIRB Section Updated

View the updated [contact for content](#) within the ITIRB section.

[04/09/2009] SDLC Section Updated

View the new [USPTO 3.0 Bulletin 09-006](#) on the [SDLC Home Page](#).

[04/09/2009] Policies Section Updated

View [new policy announcement](#) and the updated [IT Security Page](#).

[04/09/2009] Active PRA Information Collections Page updated

View the updated [USPTO PRA Crosswalk Inventory](#) form.

[04/06/2009] Policies Section Updated

View [new policy announcement](#), the updated [Admin Policy Page](#) and the [IT Ops Policy Page](#).



[04/06/2009] In the SDLC section, the Related Links have been updated

View the updated [WRF](#) (Work Request Form) [Status Report](#)

Welcome to the newly revamped OCIO Website!

The posting of this updated website marks the completion of Phase One of the OCIO Website Consolidation Project. Phase One involved migrating the content on what was the current OCIO website to this new layout and reorganizing all content by subject matter. Feel free to look around and [let us know what you think!](#)

The next phase involves migrating the content from the 30+ OCIO divisional websites to this revamped OCIO Website. As each divisional website content is moved here, the divisional websites will be retired. When the project is completed, all OCIO divisional content will be housed in this single, central OCIO Website and organized by subject matter. Migration of divisional content will be announced right here in "What's New" as each site is incorporated - so stay tuned!

Please note the new visual aid  in the global navigation system. You may recognize it as a icon that is often used in wiki's to signify an external link. The icon means the same thing here on the OCIO site. Navigation links or links within content that display this image  mean that the link will take you outside the OCIO Website to another location. Just a tip so you know what to expect!

OCIO Transformation Roadmap Logos

The OCIO Transformation Roadmap project has a new logo that should be used on all its related items: nametags, stationery, mugs, t-shirts and the like. The [announcement](#) details usage of the logos.



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[OCIO Home](#) [CIO's Desk](#) [IT Investment & Planning](#) [IT Development](#) [IT Operations](#) [OCIO Admin](#) [OCIO Org](#) [Biz Customers](#) [Archive](#)
USPTO Intranet: [Intranet Home](#) [Index](#) [Resources](#) [Contacts](#) [Internet Search](#)

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OCIO Website :: Accessibility Statement

Access Keys

The OCIO website uses keyboard shortcuts, or access keys, to enable keyboard-based access to each of the main sections of the website as well as to other commonly used links.

The following access keys are defined for all OCIO website pages:

Access Key Chart		
Access Key	Section/Link	Keyboard Command
H	Home Page	Alt + h, Then Enter
1	From the CIO	Alt + 1, Then Enter
2	IT Investment & Planning	Alt + 2, Then Enter
3	IT Development	Alt + 3, Then Enter
4	IT Operations	Alt + 4, Then Enter
5	OCIO Admin	Alt + 5, Then Enter
6	OCIO ORG	Alt + 6, Then Enter
7	Business Customers	Alt + 7, Then Enter
A	Accessibility Statement	Alt + a, Then Enter
C	Skip to Main Content on Page	Alt + c, Then Enter
T	Topic Index	Alt + t, Then Enter
W	Website Support	Alt + w, Then Enter

How to use Access Keys

Press and hold the ALT key and one of the access keys listed in the above table to highlight the desired link, then press ENTER on the keyboard to load the corresponding page.

Navigational Aids

The website has been designed to specifically support the following Jaws features:

- Use of the Jaws Heading List Dialog Box [Jaws Key (Insert) + F6]
Page content has been structured to provide a logical step-by-step navigation through the page content when the Tab Order setting in the Jaws Heading List Dialog Box setting is selected.
- Use of the Jaws Links List Dialog Box [Jaws Key (Insert) + F7].
Link text provides a clear description of its content to aid users in selecting links from the Jaws Links List Dialog Box.
- Use of Navigation Quick Keys
As an alternate to the above two options, users can utilize JAWS quick keys H and L to navigate through headings and links respectively.
- Use of the Tab key
The Tab key can be used to navigate from link to link around the website without the need for a mouse. Also, the link text provides a clear description of its content.
- Use of Alt + down arrow (feature available in Internet Explorer only)
To display the contents of drop down boxes, apply the focus on the box, then press and hold the Alt key and press the down arrow key.

Skipping Navigation Areas

The website provides users the ability to skip navigation areas of the website (commonly referred to as Skip Nav).

Links are provided to skip the following navigation sections of a page.

- Skip to OCIO Website Navigation: This link takes users to the OCIO website main navigation bar starting with the website Accessibility link. This link is placed before the USPTO navigation bar.
- Skip to Content: This link takes users to the beginning of the page content. There is one link placed before the USPTO navigation bar, and another placed before the OCIO site main navigation bar.
- Skip Page Navigation: This is only available when there are page navigation links on the right side of the page. This link takes users to the content in the left side of the page. This is placed before the page navigation title.

Site Structure and Navigation Scheme

General Layout for Standard Content Pages

Standard Content Pages are organized in the following manner:

In the header area, the standard USPTO Intranet navigation links are found across the top going left to right. To the right of these links are the website Utility links. Below the Utility Links is a Quick Links JavaScript-driven drop-down menu. Below the Quick Links, running left to right are the global navigation links for the website. Below the global navigation on the left is the search box. After the header components, the content of the page follows in the left-hand column. The H1 header title indicates the name of the page that you are on with the rest of the content separated by H2, H3, or H4 headers, as appropriate.

In the right-hand column of the standard content page are special call-out boxes. The first call-out box is called, "In this section" which lists links to additional pages in that section. Below this is a call-out box called, "Related Links" which lists additional information that may be helpful. Below this is a standard call-out box call, "Content Update/Comments". Links provided in this call-out box go to the content owners so that you may request content updates or offer comments and suggestions.

The footer of each page then follows, containing text navigational links for the main sections of the OCIO site, as well as the standard USPTO Intranet navigation links. A date and time stamp of when the page was last updated is also included.

Exceptions

There are several important exceptions to the default content page layout as described above. Listed below are other special page types:

Home Page

The OCIO Home page is organized in two columns with the standard header and footer as described above. Below the global navigation/Search box area and before the page is split into 2 columns there is a special page-wide box which lists quick links for the [From the CIO](#) and the [Business Customers](#) website sections.

Below this, in the left-hand column is a list of IT Support links. Next, are the OCIO Mission, Vision and Values with each contained in a collapsible box. In the next set of collapsible boxes are Communication Initiatives quick links. Below this are links to the [OCIO Survey form](#) and the [OCIO Website Suggestion form](#) which are also contained in their own collapsible box.

The right-hand column provides a short overview and introductory text. Below this are 4 tabbed panels. The first tab is "What's New" where announcements of what is new or changed on the website will be posted. The last 3 tabs are for quick links for items in the IT Investment & Planning, IT Development and IT Operations sections of the website.

Landing Pages

Some pages are a simple listing of links to sub-sectional pages below that particular landing page. For example the main reports page just lists the reports found within that section. This is a simple 1 column page without call-boxes or other features.

The Main page for each primary section of the website is also a landing page and is primarily a listing of links to the sub-sections for that area. However, these main section landing pages also have a left-hand column with "Quick-Aid" links to such items as the [Website Topic Index](#), [Website Archives](#), and [Contact Us](#).

Site Utility Links

- [Skip to Content](#) - This link takes you directly to the top (beginning) of the main content area of the page you are on.
- [OCIO Topic Index](#) - This page provides a text listing of the website's content.
- [Site Accessibility](#) - This page (titled "Site Accessibility Statement").
- [Site Support](#) - This page provides information on how to submit website content updates and other support information.

Site Content - 7 Main Sections

1. [From the CIO](#)
2. [OCIO Admin](#)
3. [OCIO Organization](#)
4. [IT Investment & Planning](#)
5. [IT Development](#)
6. [IT Operations](#)
7. [Business Customers](#)

Links

All graphical links have been given descriptive ALT tag text. Additionally, all primary site links are repeated at the bottom of each page as text links.

Images

All content specific images used on this site have been given descriptive ALT tag text. Decorative graphics have been given null ALT tags, so as to allow Jaws and other accessibility software to bypass the image.

Visual Design

This site uses cascading style sheets for visual text formatting. However, if you have disabled style sheet support in your browser the content of each page is still readable.

USPTO Standards Compliance

The following are excerpts from Web Services Division's [Designing Accessible Web Content](#) web pages:

Accessibility refers to how people who have limitations in mobility, cognitive or sensory abilities can get access to the same information that people without such limitations can. To ensure [equivalent access](#), web content design must address visual, auditory, cognitive and mobility considerations.

[Section 508](#) of the WORKFORCE INVESTMENT ACT OF 1998 governs how the Federal Government and its contractors must address accessibility concerns. All web pages posted on or after June 21, 2001 must comply with Section 508 requirements; remediation plans for earlier pages must be developed to show when they will be brought into compliance.

The basic [accessibility rules](#) for Web sites were developed by the Architectural and Transportation Barriers Compliance Board (Access Board) and are contained in Section 22 of the regulations which implement Section 508. Federal web sites are required to meet Web Content Accessibility Guidelines 1.0 (WCAG 1.0) Priority 1 compliance considerations for Rules (a) through (k); Rules (l) through (p) have special compliance requirements that vary from those published by W3C.

The USPTO [Web Content Section 508 Accessibility Checklist](#), facilitates certification that all web-accessed content complies with Section 508 requirements. Section 508 certification for the OCIO website will be posted in the near future.

USPTO Accessibility References

[USPTO Designing Accessible Web Content](#)

[USPTO Section 508 Program](#)

Other questions or comments?

Suggestions for improving the accessibility features of this site are welcomed and encouraged. If you have trouble accessing any section of the website or you find something that we haven't covered that you would like to know about, [please let us know!](#)



Search Site

[Advanced](#) | [Help](#)[OCIO Home](#) > [CIO's Desk](#) > All Hands Meetings

CIO's Desk :: All Hands Meetings

2009 OCIO All Hands Meetings

- All Hands Meeting: March 10, 2009
 - [OCIO All Hands Meeting \(March 10, 2009\) \[PDF\]](#)
- All Hands Meeting: January 12, 2009
 - [OCIO All Hands Meeting \(January 12, 2009\) \[PDF\]](#)

2008 OCIO All Hands Meetings

- All Hands Meeting: September 17, 2008
 - [OCIO All Hands Meeting \(September 17, 2008\) \[PDF\]](#)
- [Transformation Roadmap All Hands Meeting](#)
 - [\[Webcast\]](#)

2007 OCIO All Hands Meetings

- All Hands Meeting: September 26, 2007
 - [OCIO All Hands Meeting \(September 26, 2007\) \[PDF\]](#)
 - [Questions from All Hands Meeting](#)
- [Quality Management Group All Hands Meeting \[PDF\]](#)

2006 OCIO All Hands Meetings

- All Hands Meeting: Friday, August 11, 2006
 - [Influences \[PDF\]](#)
 - [2006 Strategic IT Goals and Objectives \[PDF\]](#)
 - [Help Desk Assessment and Focus Groups \[PDF\]](#)
 - [HR Updates \[PDF\]](#)
 - [Introduction to IT Liaisons \[PDF\]](#)
 - [Q3 Accomplishments \[PDF\]](#)
 - [SDLC/CUSP Status \[PDF\]](#)
- All Hands Meeting: Wednesday, April 12, 2006
 - [All Hands Meeting: Wednesday, April 12, 2006 \[MS PowerPoint\] Printable PDF File](#)
 - [Budget and Finance: OCIO Activity-Based Costing \(ABC\) Model Printable PDF File](#)

2005 OCIO All Hands Meetings

- [All Hands Meeting: Thursday, December 1, 2005 \[MS PowerPoint\] Printable PDF File](#)
- [All Hands Meeting: Thursday, September 1, 2005 \[MS PowerPoint\] Printable PDF File](#)
- [All Hands Meeting: Thursday, June 30, 2005 \[MS PowerPoint\] Printable PDF File](#)

In this Section

From the CIO's Desk:

- ✎ [CIO Desk Main Page](#)
- ✎ [All Hands Meetings](#)
- ✎ [Communication Initiatives](#)
- ✎ [IT PPA Newsletters](#)
- ✎ [News in the OCIO](#)
- ✎ [OCIO Policy Bulletins](#)
- ✎ [SDLC Bulletins](#)
- ✎ [Memoranda](#)
- ✎ [Presentations](#)

Related Links

Have a general suggestion or comment for the CIO?

- ➔ [Email OCIO Communications](#)

Content Update/Comments


Page content is managed by [CIO](#).Please send content updates to [OCIO Communications](#).Please send comments and suggestions to [OCIO Communications](#).

The OCIO Site is published by CSSG's [Information Services Division](#).

[OCIO Home](#) [CIO's Desk](#) [IT Investment & Planning](#) [IT Development](#) [IT Operations](#) [OCIO Admin](#) [OCIO Org](#) [Biz Customers](#) [Archive](#)

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CIO's Desk :: Main Page

Quick Aides



Information

For more information regarding the CIO's Section, please contact OCIO Communications.



Topic Index

The complete OCIO website topic listing.



Archive

Visit the OCIO website archive.



Contact Us

For site support, comments, and questions, please contact ISD.

Overview

This section houses communiques and other documentation from the CIO regarding IT projects and happenings within the OCIO. Visit the [OCIO Communications Initiatives Main Page](#) for announcements regarding these activities and events.

Contact Us

Have a suggestion or comment for the CIO? Please email the [OCIO Communications Mailbox](#).

Sectional Content

All Hands Meetings

The [All Hands Meetings](#) section contains notes and presentations from each of the OCIO All-Hands meetings. Presentations are in Powerpoint and PDF format.

Communication Initiatives

The [Communication Initiatives](#) section contains various OCIO communiqués including News from the OCIO, Policy and SDLC Bulletins, and PPA Newsletters. Visit the Communication Initiative Main Page for announcements regarding new and upcoming OCIO activities. Other communication initiatives will be added as OCIO IT activities occur.

Memoranda

The [Memoranda](#) section contains memos issued by the CIO.

Presentations

The [Presentations](#) section contains both presentations and publications issued by the OCIO for a variety of OCIO IT activities. Presentations are in Powerpoint and PDF format.


Reference

The [Reference](#) section contains a variety of documents and reference materials that are pertinent to the OCIO office.

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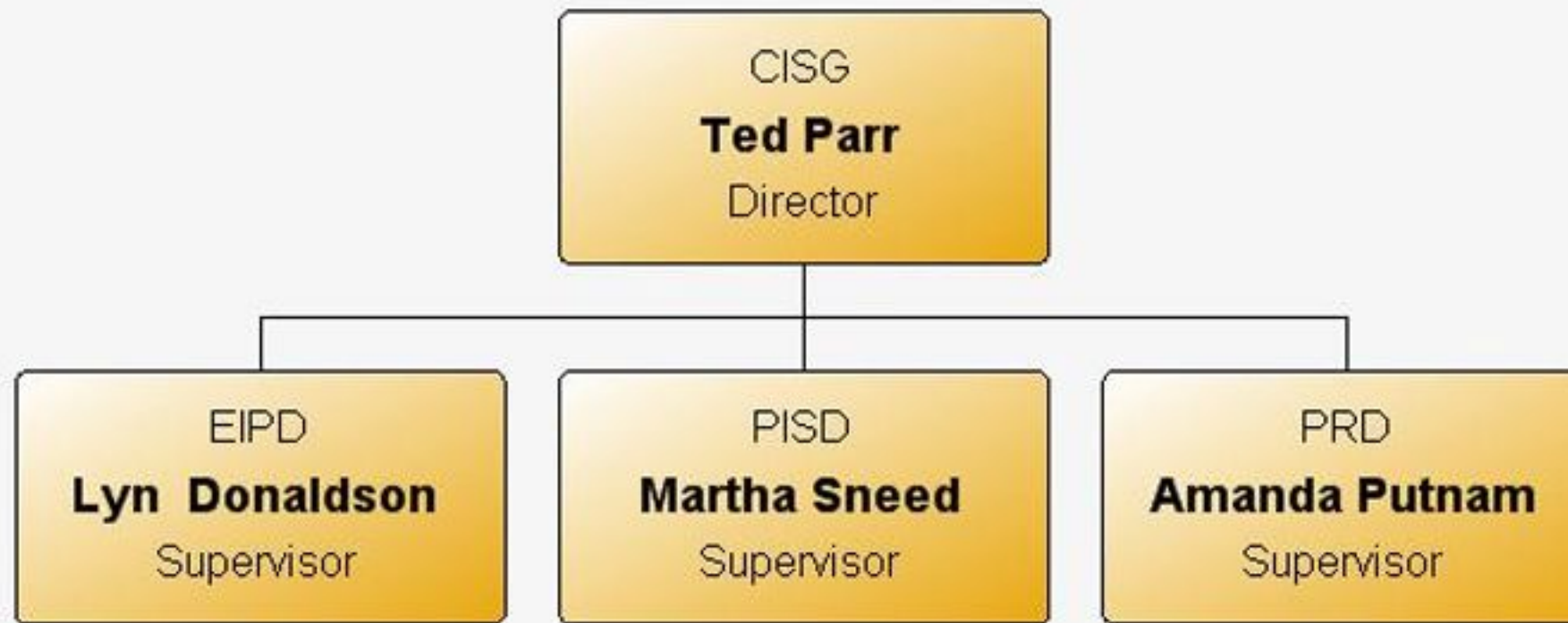
- [OCIO Main Chart](#)
- [AETSG](#) [AMG](#)
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[OCIO Home](#) > [OCIO Organization](#) > CISG

OCIO Organization :: CISG

Content Update/Comment

Page content is managed by [AMG/WDD](#). Please send suggestions and content updates to [WDD](#).



[View full OCIO Org Chart.](#)

CISG EIPD PISD PRD

Customer Information Services Group (CISG)

The Customer Information Services Group (CISG) delivers quality information products and services to meet USPTO, public, and intellectual property community needs. The CISG proactively identifies and defines customer requirements, and works with the Business Relationship Management Group to develop approaches for improving product lines to better meet constituent needs. The CISG provides access to collections of patents, trademarks, and related information through multiple nodes, and promotes dissemination of information to the public on the use of patent and trademark information systems.

CISG Staff

Employee	Title
Parr, Ted	Director

The Title column is sortable by clicking the column header.

CISG Managed Content

This group currently has no managed content.

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Search Site

[Advanced](#) | [Help](#)[OCIO Home](#) > [IT Investment & Planning](#) > [Reference Main Page](#)

IT Investment & Planning :: Reference Main Page

IT Investment & Planning: Reference

Listed here are a variety of documents and reference materials that are pertinent to IT Investment and Planning.

IT Investment & Planning Reference - Documents

- Other "IT Investment & Planning" Reference documents will be listed as they become available.

IT Investment & Planning Reference - Web Pages


- Other "IT Investment & Planning" Reference web pages will be listed as they become available.

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Search Site

[Advanced](#) | [Help](#)[OCIO Home](#) > [IT Operations](#) > Reports Main Page

IT Operations :: Reports Main Page

Overview

In this section, you will find information regarding various Operational Reports.

Sectional Links

- ➔ [AIS Executive Reports](#) 
- ➔ [IT Facilities Mgmt System Reports & Drawings](#)
- ➔ [Website Statistics](#) 
- ➔ [Web Access Reports](#)

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[OCIO Home](#) > [OCIO Admin](#) > Policies Main Page

OCIO Admin :: Policies Main Page

Overview

In this Policy section you will find information about Finance, IT Development, IT Operations and IT Security.

OCIO Policy Announcements

New OCIO Policy for the USPTO Enterprise Share

Effective April 27, 2009, John Owens signed a new policy that establishes a framework for the use and management of the USPTO enterprise Sharepoint environment.

New OCIO Policy for Information Security for Data and Systems While Individuals are on Foreign Travel

Effective April 2, 2009, John Owens signed a new policy that ensures that USPTO data and systems are protected in a secure and effective manner while individuals are on official foreign travel.

New OCIO Policy for Configuration Management Artifacts

Effective April 2, 2009, John Owens signed a new policy that addresses the management of certain information technology data maintained in the CM repositories and CM library.

New OCIO Policy for Data and Documentation Requests

Effective April 2, 2009, John Owens signed a new policy that establishes the framework for accurate, consistent, and timely compliance to requests for information or documentation received by the OCIO.

[February 01, 2009] New OCIO-Wide Policy on Policies

Effective January 21, 2009, a new policy defining how OCIO policies will be managed was formally adopted by OCIO. This new policy, signed by John Owens, CIO, defines how OCIO policies will be developed, reviewed, cleared, adopted, and communicated to OCIO staff. In 2009 OCIO will be reviewing all of its current policies and will update them as needed or develop new policies as required. This new policy provides the framework for this process.

Contact Us

Have a suggestion or comment regarding OCIO Policies? Please email the [OCIO Policy Mailbox](#).

OCIO Policy Bulletins

- [March 31, 2009] [OCIO Policy Bulletin](#)

Requirements Engineering	Artifacts
IT Roadmap	FAQs
IT Security	Models
UEA	Activity and Role Descriptions
SDL	Training
ORR	Archive (v2.0)
Projects	
Standards & Best Practices	
IT in Transition	
Reference	
Other	

In this Section

- Policy Section:
- [Policies Main Page](#)
 - [Administrative Policies](#)
 - [Budget and Finance Policies](#)
 - [Human Resources Policies](#)
 - [IT Development Policies](#)
 - [IT Operations Policies](#)
 - [IT Security Policies](#)

Related Links

- [Office of Human Resources Website](#)
- [Budget Main Page](#)
- [IT PPA Newsletter](#)
- [PPA Resources](#)

Content Update/Comments

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OCIO Website :: OCIO Website Suggestions and Comments Form

Help us improve our customer and quality focus!

Please provide your comments and suggestions below:

Your Contact Information

This information is optional, but if you would like a response we need to know who you are.

Your Name (Optional):

Your Email Address (Optional):

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OCIO Organization :: Main Page

Quick Aides



Submit an Org Chart Change Request

An ORG chart needs an update? Let us know.



Employee Locator

Search for an employee.



Topic Index

The complete OCIO website topic listing.



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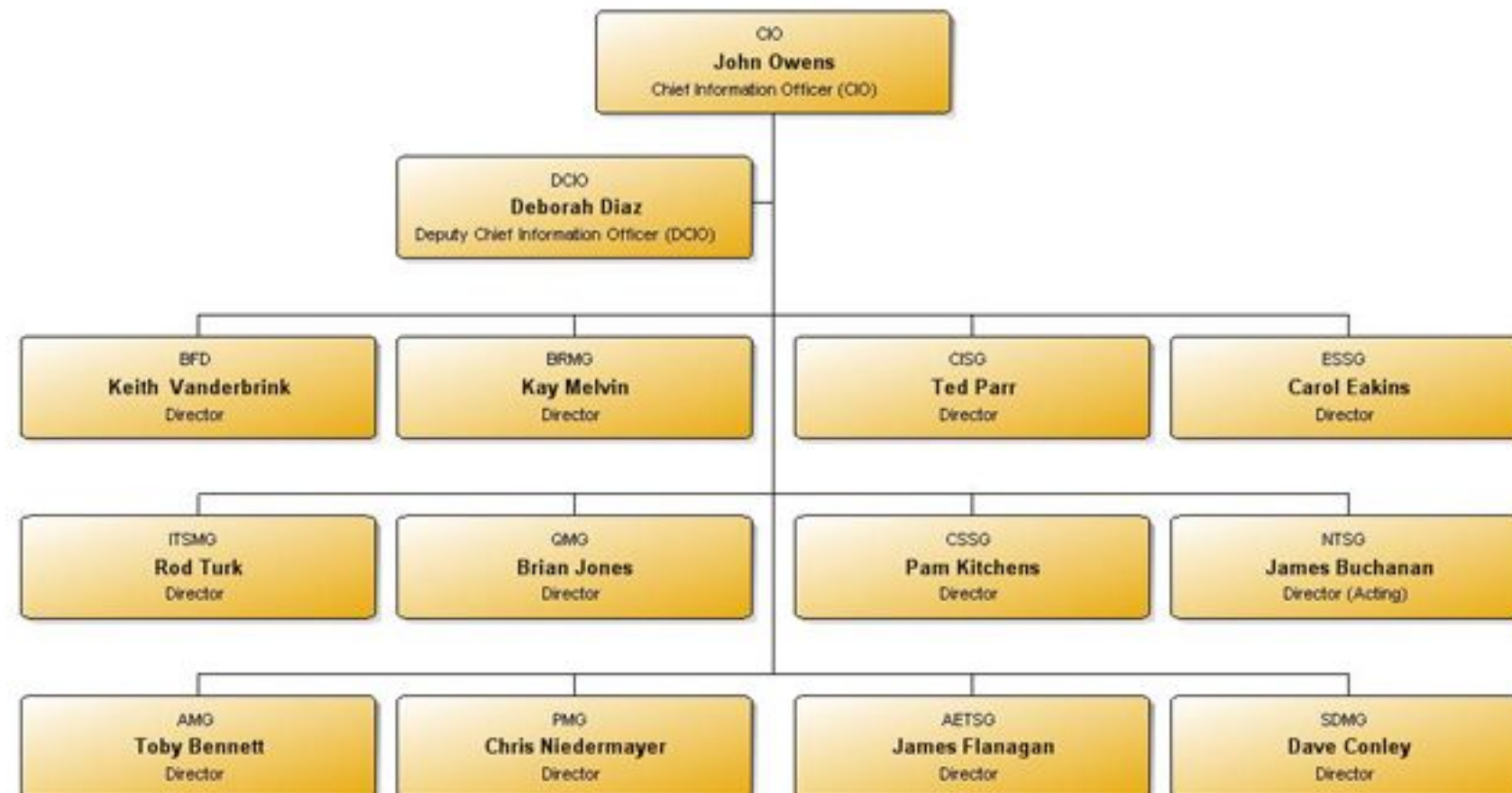


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Overview

A graphical representation of the Office of the CIO organizational structure is presented below. Select an organizational chart box to view additional information for that department. You may also view the OCIO ORG Chart in [Adobe Flash format](#).



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Page bookmark links:

-  [Current ORR Schedule](#)
-  [Previous ORR Schedule](#)

[OCIO Home](#) > [IT Development](#) > [Operational Readiness Review Projects \(ORR\)](#)**IT Development :: Operational Readiness Review Projects (ORR)****ORR Meeting Location**

ORR meetings are held in the Madison East Conference Room (MDE-3C45), unless otherwise indicated below.

ORR Scheduling Requests

Email all ORR Scheduling requests to the ORR Scheduling Request Mailbox.

Weekly Project Assessment Meetings

The meeting occurs every Thursday from 9:00 AM to 10:30 AM in the Madison East Conference Room (MDE-3C45). Support Groups will meet to assess preparedness for upcoming projects.

ORR Documents

- [ORR Document Summary Form](#)
- [ORR Process](#)
- [Operational Support Plans \(OSPs\)](#)
- [Configuration Management](#)

Related Links

-  [SDLC](#)
-  [Projects](#)

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Current ORR Schedule

Date	Time	Location	Phase	System Name
Monday, May 11, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	ACTS 4.5.5/PALM 3.31.1/EFOIA 4.2.1 ORR
Monday, May 18, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	CMS 6.0

Previous ORR Schedule

Date	Time	Location	Phase	System Name	Minutes
Monday, April 27, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	RAM 4.5	
	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	ESPS 1.0	
	11:30 - 12:00	MDE Conference Rm (3C45)	ORR	X-SEARCH Business Intelligence (X-S BI) 1.0	
Monday, April 20, 2009		MDE Conference Rm (3C45)	ORR	FAST 1.15	
Thursday, April 16, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	LIFTS 1.0 Follow-Up	
Monday, April 13, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	EAMS 2.6	
	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	LIFTS 1.0	
	11:00 - 11:30	MDE Conference Rm (3C45)	ORR	WEST 2.5, PUBWEST2.5, CSS 2.3	
	11:30 - 12:00	MDE Conference Rm (3C45)	ORR	ECM LITE 1.0	
Thursday, April 2, 2009		MDE Conference Rm (3C45)	ORR	UIRS 1.0 Follow-Up	
Monday, March 30, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	Momentum 1.2.1	
	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	UIRS 1.0	
Monday, March 9, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	ACTS 4.5.4	
Thursday, March 5, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	TEAS 4.5	
Thursday, February 26, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	FAST 1.15 Follow-Up	
Monday, February 23, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	FAST 1.15	
Monday, February 2, 2009	11:30 - 12:00	MDE Conference Rm (3C45)	ORR	TSS 2.0	
Monday, January 12, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	EDW 3.3.3	
Thursday, January 8, 2009	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	TEAS 4.4	
Monday, December 1, 2008	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	EIR 1.1	
Wednesday, November 26, 2008	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	PFW 2.3 Follow-Up	
Monday, November 24, 2008	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	PFW 2.3	
Monday, November 17, 2008	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	EDW 3.3.1	
	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	MOMFN 1.2 and EDW 3.3.2	
Monday, November 3, 2008	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	eDAN 2.4.3	
Monday, October 27, 2008	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	RAM 4.4.2	
Thursday, October 23, 2008	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	TDA 2.4 Follow-Up	
Monday, October 20, 2008	10:00 - 11:00	MDE Conference Rm (3C45)	ORR	TDA 2.4, PALM Pre-Exam 3.19 and PALM EXPO 3.30A	
	11:00 - 11:30	MDE Conference Rm (3C45)	ORR	EAIS 2.1	
Monday, October 6, 2008	11:00 - 11:30	MDE Conference Rm (3C45)	ORR	CAMU 1.1	
Monday, September 22, 2008	10:30 - 11:00	MDE Conference Rm (3C45)	ORR	EDW 3.3	
Monday, August 11, 2008	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	EFSWeb 1.4	
Monday, August 4, 2008	10:00 - 10:30	MDE Conference Rm (3C45)	ORR	TTABIS 2.8	
		MDE Conference Rm (3C45)	ORR		

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OCIO Home > Archive > SDLC 2.0 > FAQs

SDLC 2.0 :: FAQs

The FAQ below relates to the USPTO Software Development Life Cycle, version 2.0 *only*. It is retired. The SDLC v. 3.0 FAQ is [here](#).

Bookmark Links

- [Will projects started before the approval of the SDLC be required to follow the SDLC?](#)
- [Will there be a PM and a SDL on every project?](#)
- [When did the new SDLC go into effect?](#)
- [What documents are required for the Project Kick-Off meeting?](#)
- [Who prepares the documents for the Kick-Off meeting?](#)
- [Who decides what documentation and processes can be tailored in or out of a project plan?](#)
- [How many formal reviews are required in the new SDLC process?](#)
- [Where are all the forms located?](#)
- [Is the project manager always in PMO?](#)
- [Is Earned Value part of the new SDLC process?](#)

- SDLC 2.0 Archive:
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 - [SDLC 2.0 FAQ](#)
 - [SDLC 2.0 Templates](#)

Related Links

- [Current SDLC Main Page](#)

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Q Will projects started before the approval of the SDLC be required to follow the SDLC?

A No, projects that started before the approval of the SDLC Process are considered "grandfathered" and should continue with their original plan.

Q Will there be a PM and a SDL on every project?

A The project manager for any given project can be a member of PMG or SDMG, so there may be times where the PM and the SDL are the same person.

Q When did the new SDLC go into effect?

A The SDLC was approved on June 5 and is scheduled to be implemented on June 30, 2007.

Q What documents are required for the Project Kick-Off meeting?

A The Project Kick-Off Package required for the Project Kick-Off meeting are:

1. Project Analysis Document;
2. Quality Assurance Plan;
3. Configuration Management Plan;
4. Communication Management Plan;
5. Project Schedule/Activity Descriptions;
6. Requirements Management Plan;
7. Risk Management Plan;
8. Cost Estimation Worksheet;
9. Approved FN07.

Q Who prepares the documents for the Kick-Off meeting?

A The project manager has the ultimate responsibility for ensuring that all documents are prepared for the Kick-Off Meeting. However, PM's should request and receive support from various OCIO organizational units as shown in table below.

Kick-Off Meeting Document Support		
Document	Support Organization	POC's
Project Analysis Document	PMO	Project Manager
Quality Assurance Plan	PMO	Dot Deutch
Configuration Management Plan	ESSG	Mike Senkow
Communications Plan	PMO	Lan Xiao
Project Schedule / Activity Descriptions	PMO	Project Manager
Project/Budget Planning Data Entry Worksheet	BFD	Maureen Cardone
Requirements Management Plan	PMO	Stella Shanholtz
Risk Management Plan	PMO	Lan Xiao

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Q Who decides what documentation and processes can be tailored in or out of a project plan?

A The Project Manager should consult with Quality Assurance to determine what documentation and processes can be tailored in or out of the Project Plan.

Q How many formal reviews are required in the new SDLC process?

A There are two formal reviews required in the new SDLC process:

1. The project Kick-Off Meeting at the end of the analysis and planning phase, and
2. The Operational Readiness Review (ORR) at the end of the Functional Qualification Testing (FQT) phase.

Q Where are all the forms located?

A The official versions of all the forms are located on the OCIO website, [SDLC 2.0 Template page](#).

Q Is the project manager always in PMG?

A The project manager will be assigned by the PMG. However, the project manager may be assigned from PMG, SDMG, or another designated organization.

Q Is Earned Value part of the new SDLC process?

A Earned Value is an important part of the new SDLC process, even though it is not formally detailed in the SDLC Manual. There are steps being taken to implement a full EVM System within USPTO. Currently EVM data is collected on 90% of all discrete task orders.

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SDLC :: Artifacts



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Alpha Phase Lead SDLC Role

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Alpha Listing: A

Artifact	Lead SDLC Role	Phase	Guidelines	Last Revised
Accreditation Letter	IT Security Facilitator	Deployment		
AIS Operational Summary	Server Manager	Testing		

The Artifact, Role, Phase, and Last Revised columns are sortable by clicking the column header.

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SDLC :: FAQs

Overview

The SDLC 3.0 FAQ v 1.4, approved February 26, 2009, is below.

The FAQ is also available as a [Microsoft Word](#) document. The [SDLC 3.0 User Comments](#) are available in Microsoft Excel format.

Bookmark Links

- [General Questions](#)
- [Go/No Go Decision Questions](#)
- [Procedural Questions](#)
- [Roles and Responsibilities Questions](#)
- [Artifact-Related Questions](#)
- [Training Questions](#)

I. General Questions

Please click on a question.

1. [Who is the authority behind the SDLC 3.0?](#)
2. [How are we enforcing the SDLC 3.0 and ensuring that individuals are actually following the rules set forth in SDLC 3.0 instead of simply trying to get around them or doing things "their way?"](#)
3. [How is this process better than SDLC 2.0?](#)
4. [When did the SDLC 3.0 go live?](#)
5. [Who has to use SDLC 3.0?](#)
6. [Who owns the SDLC 3.0?](#)
7. [Who can I talk to if I have SDLC 3.0 questions?](#)
8. [Where can I find the documentation for SDLC 3.0?](#)
9. [The SDLC and artifacts are geared to software development projects; how can they be used for non-development projects?](#)

**1. Who is the authority behind the SDLC 3.0?**

The CIO and other members of the Management Council have endorsed the implementation of the refined SDLC through their approval of the OCIO Transformation Road Map. Read [a copy of the memo](#) from the CIO regarding SDLC 3.0.

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II. Go/No Go Decision Questions

III. Procedural Questions

IV. Roles and Responsibilities Questions

V. Artifact-Related Questions

VI. Training Questions

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IT Development :: Systems Development Lifecycle (SDLC) Main Page

Overview


The SDLC 3.0 is designed to efficiently take a project, IT or otherwise, through its entire lifecycle, from conception to deployment and ultimately retirement. Improvements over SDLC 2.0 include:

- Tailoring of needed steps and artifacts based on the project's size,
- Iterative properties that allow more flexibility, and
- A greater number of decision points to ensure that the process is being properly followed.

Documents

- [Quick Reference Guide](#): April 9, 2009. 
- [OCIO SDLC 3.0 Memo](#): December 19, 2008. 
- [SDLC 3.0 Overview](#): January 21, 2009. 
- [SDLC 3.0 CCB Charter](#): December 1, 2008 

SDLC Bulletins

- [USPTO SDLC 3.0 Bulletin 09-006](#): April 9, 2009. 
- [USPTO SDLC 3.0 Bulletin 09-005](#): January 5, 2009. 
- [USPTO SDLC 3.0 Bulletin 09-004](#): December 19, 2008. 
- [USPTO SDLC 3.0 Bulletin 09-003](#): Rescinded and replaced with [09-005](#), December 12, 2008.
- [USPTO SDLC 3.0 Bulletin 09-002](#): December 10, 2008. 
- [USPTO SDLC 3.0 Bulletin 09-001](#): Rescinded and replaced with [09-003](#), December 5, 2008.



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Acronym Listing: A

AAO

Agency Administrative Order

ABC

Activity Based Costing

AETSG

Architecture, Engineering & Technical Services Group

AIRS

Application Image Retrieval System

AIS

Automated Information System

AMG

Administrative Management Group

API

Application Program Interface

AQS

Applicant Quality Search

ARB

Acquisition Review Board

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