

WIPO  
ICT Leadership  
Dialogue  
(WILD)

# Harmonized & Digitalized IP Systems A New Way Forward

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WIPO

# Purpose

- Provide an overview of the journey to harmonize and digitalize IP systems at the Canadian Intellectual Property Office

# CIPO Priorities

## Three main priorities

### Priority 1

Timely delivery of quality IP services through operational excellence and a modern client experience



### Priority 2

Foster innovation and competitiveness through leadership and education

### Priority 3

Be a high-performing organization that is built for the future

## Application Volumes (2023)

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Product line	Applications
PATENTS	~40K
TRADEMARKS	~80K
INDUSTRIAL DESIGN	~9K
COPYRIGHTS	~11K

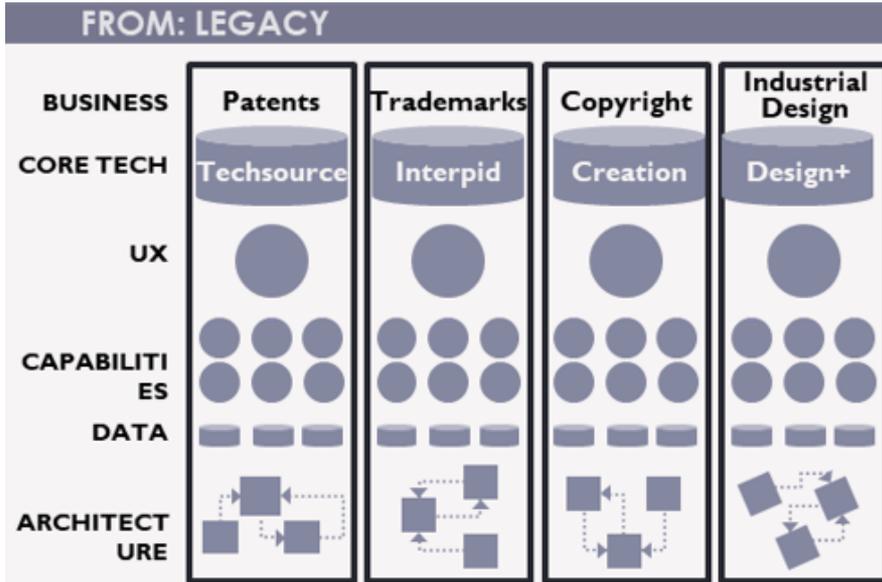
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# Context

- ❑ CIPO patent and trademarks legacy systems were launched in the late 1990s and face long-term rust out and replacement systems are needed
- ❑ CIPO legacy systems consist of a series of siloed and discrete capabilities that offer inconsistent client and employee experience
  - Techsource legacy system to administer Patents
  - Intrepid legacy system to administer Trademarks
  - DesignPlus and Creation to administer Industrial Designs and Copyrights
- ❑ Need for CIPO to print patent digital client correspondence and scan into the legacy back office system
- ❑ To address the above limitations, CIPO put into place an IT Modernization initiative to sequentially **modernize**, **harmonize**, and **integrate** IP services across CIPO product lines

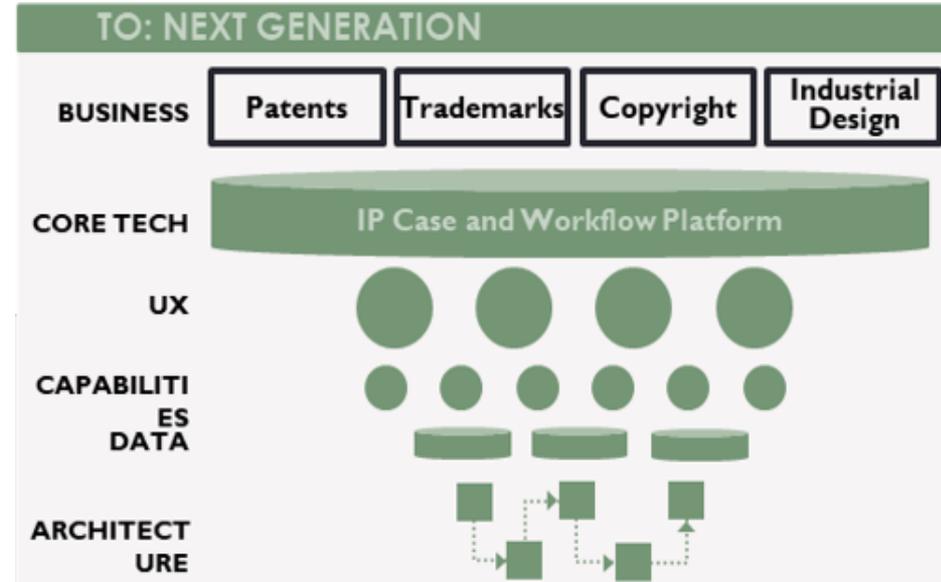
# CIPO IT Systems Modernization and Harmonization

## CURRENT STATE



- Siloed technology and data
- Discrete capabilities
- Inconsistent user experiences

## FUTURE STATE



- Cross-Line of Business capabilities
- Orchestrated data and information
- Integrated user experience

# CIPO IT Modernization and Harmonization Guiding Principles

- ❑ To improve services and processes through operational excellence and a modern client experience, CIPO led an initiative called **Next Generation Patents (NGP)** to modernize:
  - ❑ The client facing patents e-services via a centralized portal - MyCIPO Patents
  - ❑ The internal IP Rights Management System
  - ❑ The internal Integrated Financial Management System
- ❑ The initiative is guided by seven principles that serve as foundational guidelines:
  - ❑ Focus on Patent Branch initially and be selective on other modernization efforts
  - ❑ Achieve minimum operational product
  - ❑ **Leverage Patent Branch improvements for other product lines**
  - ❑ **Ensure common look and feel across business lines**
  - ❑ **Leverage API architecture to incrementally modernize front office and back office systems**
  - ❑ Leverage best practices for user centric design and co-creation
  - ❑ **Leverage International IP and IT standards throughout modernization journey**

# Next Generation Patents – Delivery Approach

Focus on **iterating specific process increments from low to higher levels of maturity**  
Build basic versions with clear pathways to add additional capabilities.

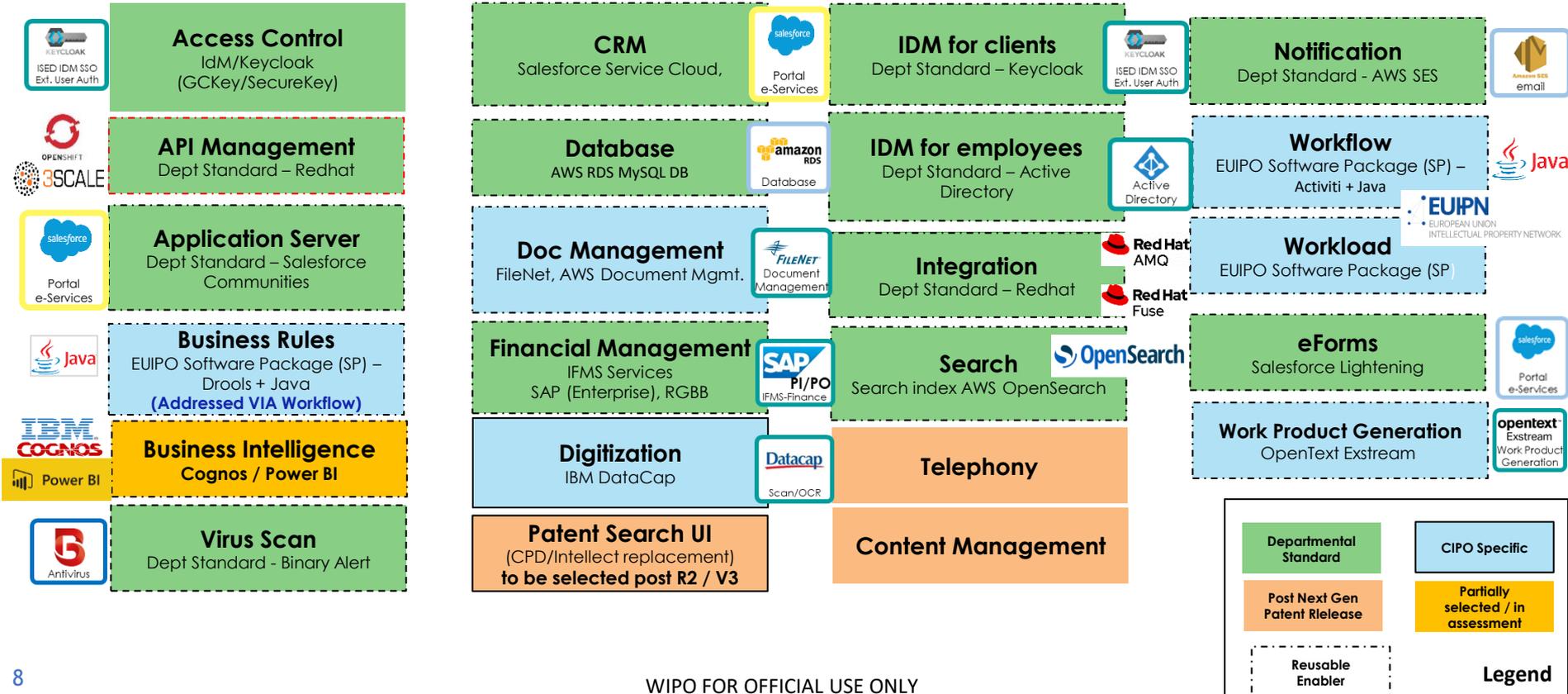
Benefits:

- Flexibility to adapt development efforts to meet depth and breadth objectives
- Flexibility for teams to plan and onboard new enabler capabilities over time



# Path for Modernization and Harmonization

The Enablers that have been stood up as part of Enterprise Standards and/or specifically for Next Generation Patents, will be reused wherever possible in pursuit of Next Generation Trademarks, significantly reducing costs of implementing additional technologies



# Next Generation Patents - Client View

1997 to July 2024

Various Forms  
Legacy Client Systems

The screenshot shows a complex, multi-layered web interface. At the top, there's a navigation bar with the Government of Canada logo and the text "Government of Canada / Gouvernement du Canada". Below this is a search bar and a menu with various categories like "Home", "Business", "Immigration", "Travel", "Benefits", "Health", "Taxes", and "More services". The main content area is titled "General Correspondence - Patents" and includes a sidebar with options like "Load a saved Correspondence", "Information", "Attachments", "Comments", "Fees", "Online help", and "Problem Report". The central form area is titled "Information" and contains sections for "Application/Patent Information" and "Sender". The "Application/Patent Information" section includes fields for "Application or Patent Number", "Title of Invention (required)", and "Applicant or Inventor Name". The "Sender" section includes fields for "First Name (required)", "Initial", "Last Name (required)", and "Name of Corporation or Firm".



July 2024 Onwards

MyCIPO Patents  
Modern Client Portal

The screenshot shows a clean, modern web interface. At the top, there's a navigation bar with the Government of Canada logo and the text "Government of Canada / Gouvernement du Canada". Below this is a search bar and a menu with various categories like "Home", "Business", "Immigration", "Travel", "Benefits", "Health", "Taxes", and "More services". The main content area is titled "MyCIPO Patents" and includes a sidebar with options like "Load a saved Correspondence", "Information", "Attachments", "Comments", "Fees", "Online help", and "Problem Report". The central form area is titled "Information" and contains sections for "Application/Patent Information" and "Sender". The "Application/Patent Information" section includes fields for "Application or Patent Number", "Title of Invention (required)", and "Applicant or Inventor Name". The "Sender" section includes fields for "First Name (required)", "Initial", "Last Name (required)", and "Name of Corporation or Firm".

# Next Generation Patents - Employee View

1997 to July 2024

## TechSource Legacy Patent Employee System

```
PA52  Add Upd Del Admin_req Accept_Clm Restore Deny_Rest Remove_Clm
TECHSOURCE PATENT ADMINISTRATION          2021/03/03
Priority Date Maintenance                   16:06:53
Type selection code (/) to select a record for update, then press ENTER.
P/A No. . . . . 3026598  Current State : Compliant  Susp. Status: Good Stand
Requested Date. . . . . Country . . . . . <F4>
Priority Date . . . . . Priority Number . . . . .
Priority Status :
Electronic Library: <F6>
Supporting Docs . . (N/R/C) Translated . . (N/R/C) Certified Trans _ (N/R/C)
MORE:
Sel Date      Country              Status Priority Number
20160607 United States of America    03  62/346,818
20161216 United States of America    03  62/435,531
LOB493-I: Successfully displayed.
F1=HLP  F2=FLDR  F3=Exit  F5=RFSH  F7=Prev  F8=Next  F9=Request Docs  F12=CNCL
```



July 2024 Onwards

## Software Package Modern Patent Employee System

IP Next Generation

Dashboard > Main Task List

Main Task List

All Tasks My Tasks

Completed Tasks

Field < > Clear < > Value < > Apply < > User Name < > < > Advanced Search < > Table Configuration < > Configure Table < > Actions < >

RIA Number	Process	Task	PCT National Appls	Imp Date	Status	User	Task Comments	PCT Indicator	Select
9004554	Verify Filing Requirements	Validate Description	2023/09/21 18:56:02	2023/01/10	Initial Submission			0	Yes
9004553	Verify Filing Requirements	Validate Description	2023/08/21 18:48:38	2020/05/22	Initial Submission			0	Yes
9004544	Perform Examination	GT Examiner's Report SCxxx	2023/08/21 15:12:44	2023/01/31	Initial Submission			0	Yes
9004527	Verify Agent Requirements	BP-4295 Check against agent requirements	2023/09/18 19:38:13	2022/02/18	Entered National Phase			0	Yes
9004527	Verify Priority Information	BP-4287 Generate priority deficiency letter	2023/08/28 19:38:33	2022/02/18	Initial Submission			0	Yes
9004508	Classify Application	Check classification	2023/08/21 18:58:19	2023/08/18	Application Compliant			1	Yes
9004508	Verify Request for	BP-4367 Send letter to applicant	2023/08/18	2023/08/18	Application			0	Yes

# WIPO Data Standards in Modern Patent System



Our front-office AWS integration layer calls Service Request Transactions to our back-office system via WIPO ST.96 XML payloads



CIPO specific service request transactions were developed following ST.96 using Patent Publication as a base for Patent components



WIPO Standard ST.27 (Patent Legal Status) was embraced as the foundation for recording patent events

- ❑ Replaced old and obsolete Patent Management System
  - ❑ Reduce risk of system failure, which could significantly disrupt the delivery of Patent services
  - ❑ Reduce operating and maintenance costs of aging Patent system
  - ❑ Reduce vulnerability to security breaches
  - ❑ Reduce skill risk or resource scarcity challenges inherent to supporting legacy IT systems
  - ❑ Enable future legislative and regulatory changes
  - ❑ Enable the adoption of emerging technologies
- ❑ Replaced old and inflexible Financial Management System
- ❑ Improved customer service experience and employee experience
  - ❑ Increasing online and self-service capabilities
  - ❑ Design intuitive and user-friendly interface
- ❑ Offer digital services in-line with partner Intellectual Property Offices

- ❑ Ensure business leaders are empowered at all levels of the organization to inform, make decisions, prioritize and ensure business needs are met
- ❑ Early and continuously engage stakeholders to ensure alignment with industry's priorities
- ❑ Implement a Portfolio management approach (strong project management practice, robust prioritization, effective governance)
- ❑ Create business-led, dedicated, integrated portfolio teams with internal IT Team as technology authority for IT Modernization
- ❑ Use different approach to procure capacity (i.e. leverage private sector (partners) & embed internal IT resources within partner-led agile teams)
- ❑ Conduct a third-party assessment and evaluation of the initiative, with a focus on successes, lessons learned, value for money and benefits delivered
- ❑ Foster and support innovation and collaboration (i.e. Support transition from waterfall to a hybrid, agile/iterative delivery)

# Conclusions and next steps

- ❑ CIPO successfully launched the new modern patent system to all external clients in October 2024
- ❑ The new modern system has considerable scope including a suite of 21 different technologies, 35 million migrated documents, 85,000 in flight migrated transactions and is fully cloud enabled
- ❑ Initial feedback on the new system is positive, stakeholders understand and appreciate the breadth of the transformation - as of January 2025, 90% of incoming client correspondences are managed via new modern Portal
- ❑ WIPO standards allowed CIPO to move forward on modernization and harmonization with little to no “discussions” leading to saved time and effort
- ❑ Building on this success, CIPO initiated the modernization and harmonization of its next priority legacy systems (Trademarks)

# QUESTIONS?



## Sudeep Acharya

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## External

## Internal



### NGP Web Site

NGP landing page



### Comms

1-way communication with our stakeholders



### Stakeholder engagement

2-way communication with our stakeholders



### Training Activities

Guides, videos



### Showcases and demos

Getting to know NGP



### Comms

Regular ITM updates



### Stakeholder Engagement

Engaging internal employees and creating change ambassadors



### Training

General and role-based training

All about NGP

Link to MyCIPO Patents Portal

Link to training activities

Continually updated

Listservs

News Release

Social Media

CSC phone message

MyCIPO Patents & Shared Access feedback sessions

Onboarding sessions including frequent flyers

Targeted emails  
UAT

Patent Practice Meetings (2PC)  
Live information sessions

Basic - Interface

Module by Module

Guidance

Showcases, Capsule videos

Examiner demos

Operations demos

ITM Bulletins, NGP SharePoint page

PLC presentations

Regular meeting updates

UX for task list, layouts

Testing – examination, operations etc.

Change Agent Network

Foundational courses

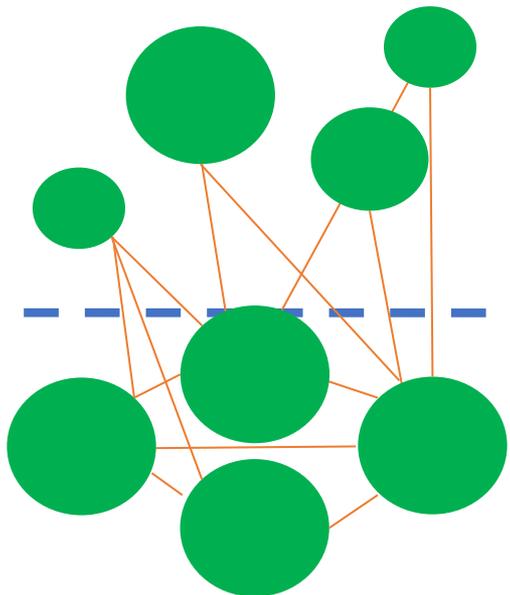
Job aids / work instructions

Tutorials

Self-paced eLearning

# NGP and Application Programming Interface

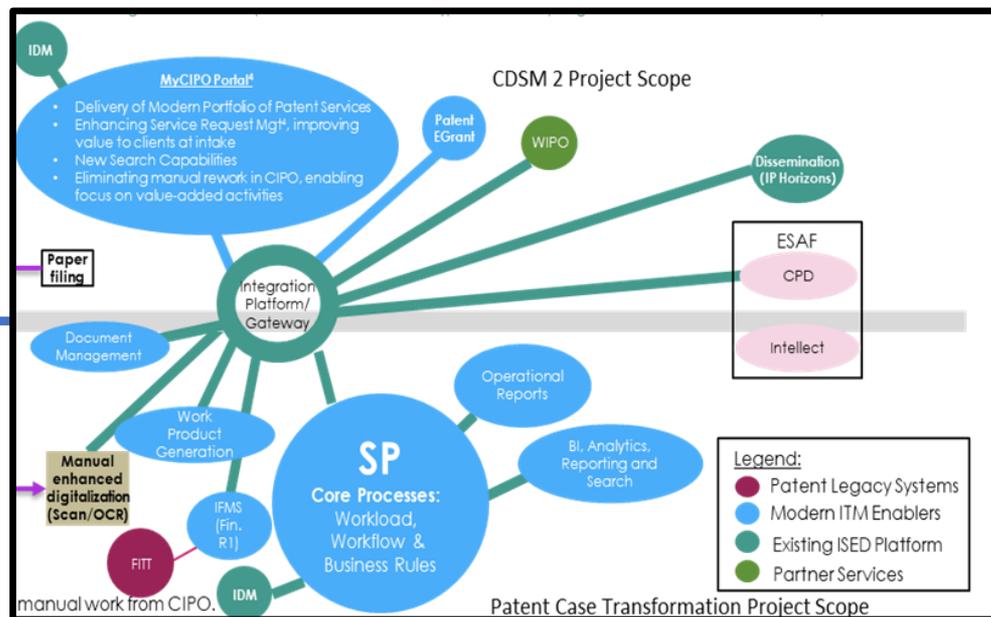
## Legacy System



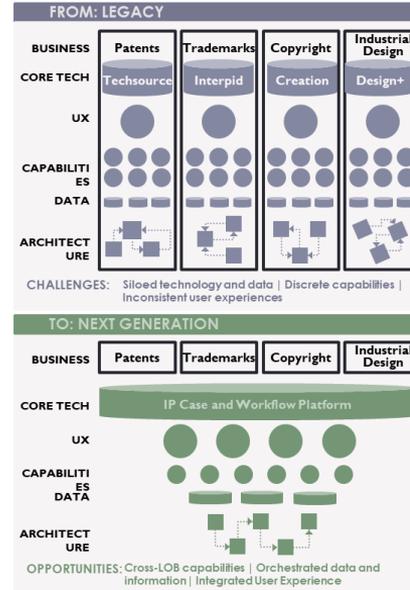
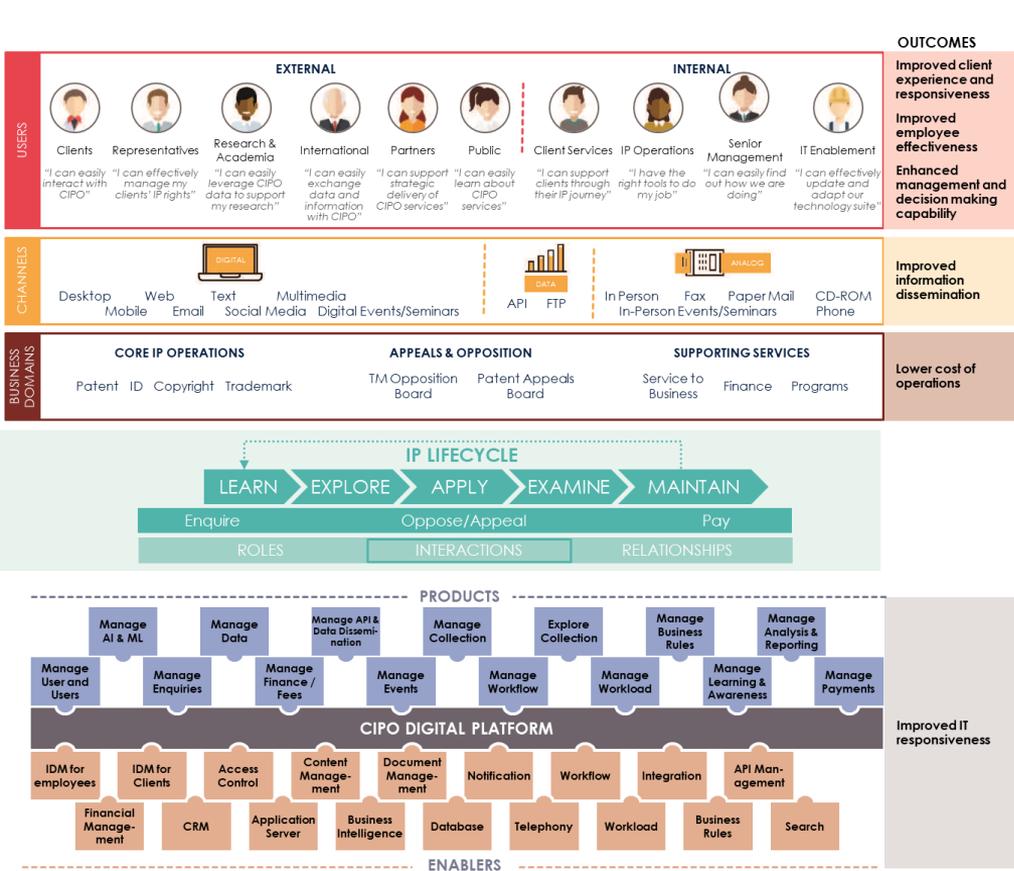
## NGP

Front-Office

Back-Office



# CIPO IT Modernization Baseline Model



- Baseline Model Provides:**
- ❑ A common lexicon
  - ❑ A shared understanding of what makes up the modernized CIPO
  - ❑ A holistic view of the people, process and technology involved in IP rights management and administration
  - ❑ A model to measure progress against the modernization journey
  - ❑ A framework to guide minimum operational product development and subsequent enhancements

# WIPO ST.96 and ST.27 at CIPO

## Patents\*

- ❑ Patents domestic E-commerce Transactions are WIPO ST.96 compliant
- ❑ Patent Dissemination and Publication are WIPO ST.96 compliant
- ❑ Exchange of Patent Legal Status Data is WIPO ST.27 compliant

## Trademarks

- ❑ Madrid Transactions are WIPO ST.96 compliant
- ❑ Trademarks domestic E-commerce Transactions are WIPO ST.96 compliant
- ❑ Trademarks Dissemination and Publication are WIPO ST.96 compliant

## Industrial Design

- ❑ Hague Transactions are WIPO ST.96 compliant
- ❑ Intent for CIPO to be WIPO ST.96 compliant in the future for Industrial Designs E-commerce Transactions and Dissemination and Publication

\*Technology base for the new, modern patent system is the EUIPO Software Package