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INFORMATION TECHNOLOGY MODERNIZATION PROGRAM
(MADRID INTERNATIONAL REGISTRATION SYSTEM): PROGRESS REPORT

prepared by the International Bureau

INTRODUCTION

1. The purpose of this document is to outline progress on the Information Technology (IT) Modernization Program (hereafter referred to as "the Program") since the last Assembly of the Madrid Union (hereinafter referred to as "the Assembly") in October 2013. The document also serves to update members of the Assembly on any change to the overall approach to the completion of the Program, as well as to notify any change to the Program schedule.

2. Document MM/A/46/1 contains the previous Program Progress Report.

3. It is recalled that the Program is to be undertaken in three phases: Phase I, Phase II and Phase III. Phase I consists of sub-projects aimed to produce immediate positive results or to lay down the technical foundations for Phase II. Phase II is the actual one-to-one technical conversion from the current IT legacy system, supporting both the Madrid and Hague international registration procedures, to a modern technology that will ensure Madrid and Hague System stakeholders benefit in the years to come from an industry standard technical platform. Phase III is the optional phase to be undertaken by the International Bureau to cater for the stabilization of the new system after official go-live date.

PHASE I – IMPLEMENTATION STATUS

4. Following the successful launch of the International Registration Process Integration (IRPI) Project (summer 2013), Phase I of the Program has been successfully closed. As a consequence, the remaining Phase I funds will be used in Phase II, and Phase I of the Program will not be further reported on in future Assembly documents.

PHASE II – BACKGROUND INFORMATION

5. It is recalled that the approved approach to the execution of Phase II of the Program is to perform a one-to-one technical migration of the legacy system to a modern, service-oriented architecture *via* the selection of a qualified external information technology partner (*ELCA Informatique SA*).

6. The objective of the technical migration is to convert the legacy application, database and internal bespoke workflow, from the programming language Natural and the database management system Adabas, to the programming language Java and database management system Oracle, including the injection of a state-of-the-art Business Process Management (BPM) tool. Achieving such migration removes the risk of the obsolescence of the current legacy infrastructure.

PHASE II – ACHIEVED RESULTS

7. Following the successful completions of Stages 1, 2 and 3 of Phase II (Analysis, Design and Pilot Implementation stages), the selected external IT partner performed the first iteration of the technical conversion of the legacy Madrid Agreement and Protocol System (MAPS) software during the course of 2013.

8. Following the technical conversion, the first major release, called Beta 1, of the newly branded Madrid International Registries Information System (MIRIS), was installed at the International Bureau on January 17, 2014. MIRIS Beta 1 release was immediately subject to a system testing phase performed by the Project Team in order to detect early defects and software performance issues. Subsequently, several bug-fixes and performance improvement releases were installed at the International Bureau during the first quarter and the second quarter of the same year.

9. A major communication event was organized on March 17, 2014, to present the Madrid End-Users Community with the preliminary MIRIS Release Beta 1. The objective of the event was to share knowledge and assure the end-user community that the upcoming MIRIS system is similar to the MAPS legacy system in terms of functionalities and end-user interaction, shortening, therefore, learning curve and adaptation of end-users while preserving their productivity.

10. Starting on January 13, 2014, a professional software tester was engaged in order to (1) reinforce system and user testing capabilities (2) streamline and automate the test cases and (3) implement the recommended suite of automated test tools. An extensive MIRIS testing campaign is necessary and will be supported by automated testing tools, providing objective evidence of test results and test coverage of the MIRIS system. Currently more than 500 test cases are constantly running on a 24/7 cycle basis *via* computerized software tools that simulate the end-user interaction with the newly created MIRIS system. Such a suite of automated test tools allows the regression testing of software programs with no human intervention, and therefore no associated financial costs, whilst allowing early detection of any new software defects that were not present in previously accepted software releases. As the existing 500 test cases represent only about 40 per cent of the use scenarios, the number of test cases will need to be increased substantially, including through the addition of more complicated scenarios, prior to the entry into production of the MIRIS system. It will be important to monitor how the MIRIS system will behave in respect of these additional test scenarios before a roll out final decision can be taken. Limited historical experience on the part of Madrid examination staff in the establishment of complete and comprehensive user test scenarios adds to the complexity of the challenge.

PHASE II – HIGH LEVEL PROJECT PLAN AND THE WAY FORWARD FOR GOING-LIVE WITH MIRIS: GOVERNANCE, RISK MANAGEMENT AND QUALITY ASSURANCE

11. Converting a 17-year old in-house developed software system, comprising more than 6,000 programs and two million lines of Natural language code, into a newly created Oracle Service-Oriented Architecture (SOA) environment with the Java programming language, together with a state-of-the-art Business Process Management (BPM) workflow engine, is certainly a daunting task. Therefore, it is of the maximum importance for the International Bureau that the new system MIRIS is fully tested prior to deployment in operation in order to avoid the risk of hampering the International Bureau's mission of serving users and Contracting Parties in the registration and administration of international marks. For this reason, and in accordance with the phased deployment approach of the PRINCE2 project management methodology, the following releases are expected to gradually integrate and complete the legacy conversion: MIRIS Release Beta 2, MIRIS Release Candidate (RC), MIRIS Release Final and MIRIS Release 1.0. The delivery date for the MIRIS Release Beta 2 is scheduled for the end of June 2014, and it is only with this version of the system that full system and user testing can begin, and then each subsequent release will be subjected to the same stringently reinforced acceptance criteria.

12. The challenges to the Madrid Registry when the IT Modernization Program began in 2008 are fundamentally different to the challenges of today. Given the very dynamic and fluid nature of Madrid international trademark registration procedures, it is extremely important that the MIRIS system is able to address the original, as well as any newly identified challenges. In order to mitigate any associated risks, an external review of the IT Modernization Program has been initiated late in the second quarter of 2014, whilst noting that, following an internal audit of the Brands and Designs Sector revenue processes, there is a recommendation that a post IT Modernization Phase II implementation review should be undertaken. The terms of reference of the review includes overall approach, system functionality, system performance, user and system testing processes, and commissioning strategies. Such a review will allow the International Bureau to more accurately determine the scheduled MIRIS go-live date.

13. It is worth noting that, for a period of 12 months after the International Bureau acceptance of the delivered MIRIS software, the external technology partner must honor, free of charge to the International Bureau, a warranty period for any software bug identified, related to the technical conversion of the MAPS legacy system.

14. Phase II of the Program was initiated in the third quarter of 2010. Tasks from 1 to 10 of the High Level Project Plan presented in Figure 1, below, have already been completed. Task 11 is in progress. The Program is running according to the following schedule which will be verified by the external review of the IT Modernization Program:

ID	Task Name	Start	Finish	% Complete
1	Project Manager Selection Process	01.07.2010	30.09.2010	100%
2	Publication of Expression of Interest (EOI) - First Round	13.09.2010	08.10.2010	100%
3	Evaluation of EOI Responses - First Round	09.10.2010	30.11.2010	100%
4	Project Manager at WIPO	01.12.2010	01.12.2010	100%
5	Publication of EOI - Second Round	15.12.2010	17.01.2011	100%
6	Evaluation of EOI Responses - Second Round	18.01.2011	18.03.2011	100%
7	Publication of Request for Proposal (RFP)	21.03.2011	20.06.2011	100%
8	RFP Due Date	20.06.2011	20.06.2011	100%
9	Evaluation of RFP Responses	21.06.2011	30.09.2011	100%
10	Contract Review Committee (CRC) Approval & Contract Negotiation	01.10.2011	31.12.2011	100%
11	Project Execution	16.01.2012	31.03.2015	75%
12	Go Live	31.03.2015	31.03.2015	0%

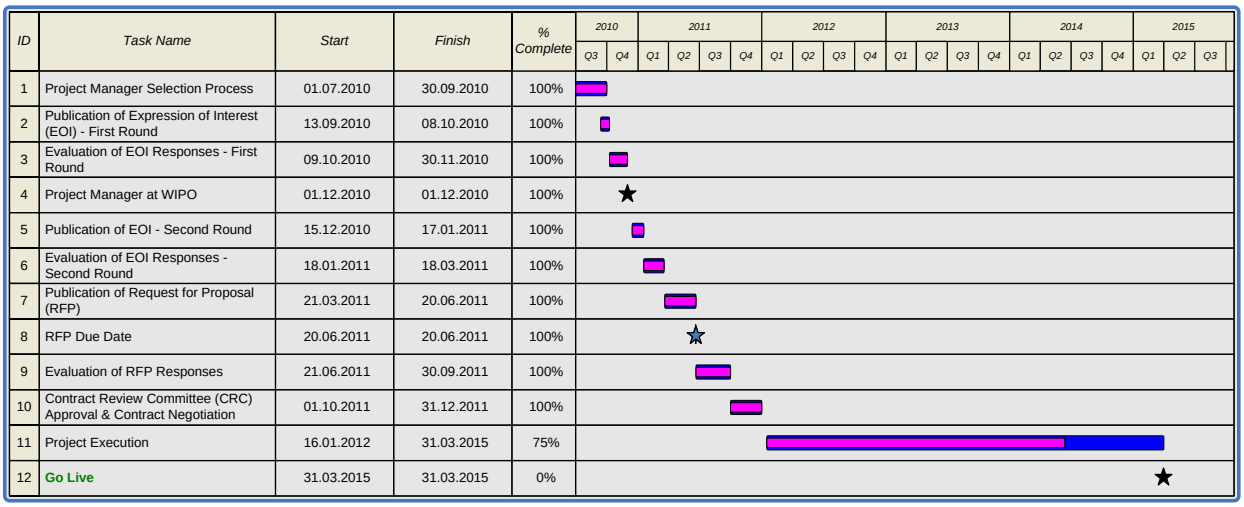

Figure 1- Phase II High Level Project Plan

15. As indicated in earlier IT Modernization Program Progress Reports, and only if needed, the International Bureau will propose to enter into the execution of Phase III of the Program to accommodate post-go-live activities, such as bug-fixes, performance improvements as well as the transformation of the end-user interface and possible process reengineering. Since the need for a possible Phase III can only be evaluated after deployment, the details of a possible Phase III will be elaborated in a subsequent Progress Report.

BUDGET UTILIZATION

16. A total resource envelope of 13.804 million Swiss francs was approved for the project (10.804 million Swiss francs by the Assembly of the Madrid Union and 3 million Swiss francs by the Assembly of the Hague Union). To date, actual expenditure on the project amounts to 10.464 million Swiss francs, or 76 per cent of the project budget. The remaining resources are expected to be sufficient to complete Phase II of the Program, it being understood that the conclusions of the external review may imply the assignment of additional resources in order to ensure appropriate risk management and quality assurance.

Table 1 - Financing Status (in thousands of Swiss francs), as of end March 2014

	Resource from Reserve	Expenditure excludes encumbrances and pre-encumbrances	Balance as of end March 2014
Phase I	3,569	3,277	292
Phase II	10,235	7,187	3,048
Total	13,804	10,464	3,340

17. The Assembly is invited to take note of the content of the Progress Report on the Information Technology Modernization Program (Madrid International Registration System) (document MM/A/48/1).

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