

# Transitioning from TESS to the new search system

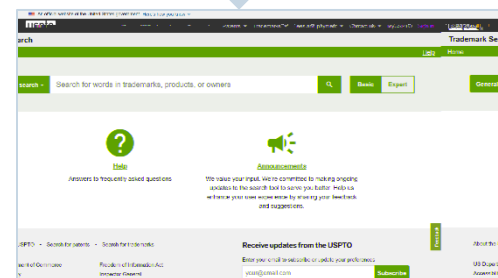
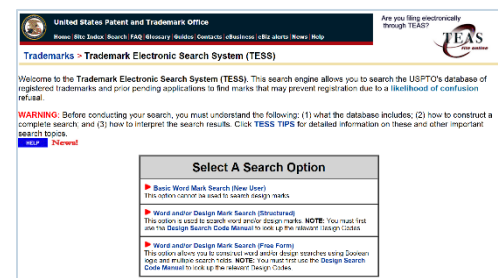
## Retiring the Trademark Electronic Search System (TESS)

### Overview

- We introduced TESS in 2000.
- It relied on a proprietary search language that is no longer supported.
- Therefore, we introduced a new public trademark search system and search language.
- To ease your transition, use these shortcuts and tips as a guide.

### Practical tips

- Continue to use the same searching concepts you always have.
  - Knock-out searches
  - Fields tags
  - Pattern matching, wildcards, and truncation
- Conduct **exact-match, single-term** searches using the **Wordmark** drop-down option.
  - Type in your search term with no pattern marching, wildcards, or truncation.
- Conduct **complex, multiple-term** searches using the **Field tag and Search builder** option.
  - Field tag searching
    - Begin with a field tag in all caps, followed by a colon.
    - Type in your search term in lowercase.
  - Search builder
    - Use this tool to construct searches while you're learning the new syntax.
  - Field tag searching with regular expressions (regex)
    - Only use regex when you want to conduct phonetic equivalent and alternate spelling searches.
- Log in to your USPTO.gov account to access summary pages and to reduce error messages.
- Turn on "expert mode" to tag results, conduct combined line searches, and access the summary page feature.



## Searching mechanics

### Field tag searching

#### Field tags

For each mark in our database, data is stored in distinct fields, and you can use field tags to search the various fields individually. In the new syntax, the field tag appears first, followed by a colon.

Field tags are the best way to conduct complex, multiple-term searches similar to TESS free-form and structured searches.

TESS field tag	New search field tag	Field	Example
[comb]	CM:	Combines word, pseudo mark, translation fields	CM:map <i>finds map in the word, pseudo mark, and translation fields</i>
[bi]	WP:	Word/pseudo mark	WP:english <i>finds english in the word and pseudo mark fields, but not the translation field</i>
[fm]	FM:	Full mark	FM:flex <i>finds only flex</i>
[gs]	GS:	Goods and services	GS:dish* <i>finds dish, dished, dishing</i> GS:"dietary supplements" <i>finds exact phrase</i>
[cc]	CC:	Coordinated class	CC:009 <i>finds marks in classes coordinated to international class 9</i>
[ic]	IC:	International class	IC:025 <i>finds marks in international class 25</i>
[ld]	LD:	Live/dead indicator	LD:true <i>finds live marks</i> LD:false <i>finds dead marks</i>
[rg]	RG:	Register	RG:supplemental or RG:s* <i>searches for trademarks on the Supplemental Register</i>
[ds]	DS:	Disclaimer	DS:beauty <i>finds disclaimers that include beauty</i>
[dc]	DC:	Design code	DC:26.17.13 or DC:261713 <i>periods are optional</i> DC:0311* <i>use wildcards for multiple codes</i>
[de]	DE:	Description of the mark	DE:panda <i>finds marks with panda in the mark description</i>
[on]	ON:	Owner name	ON:"pepsico, inc" <i>finds exact owner names</i>
[sn]	SN:	Serial number	SN:79* <i>finds all Madrid applications</i>
[rn]	RN:	Registration number	RN:6182232 <i>finds specific registrations</i>
[at]	AT:	Attorney of record	AT:("Jane Smith" OR "Jane D Smith")

## Wildcards

Use wildcards in your search term to match any character except for an empty space. You can use them anywhere in the search term and in any field, but **don't** use them inside quotations.

Wildcard	Explanation	Search example
?	Returns one instance of <b>any character</b> except space	d?g
*	Returns infinite instances of <b>any character</b> except space	*test*
" "	Matches an exact item	ON:"nike inc" returns all marks owned by Nike Inc.  Does not return owners with just <i>nike</i> in the name
[ TO ]	Designates a range	RD:[2020-01-01 TO 2020-12-31] returns all marks with a registration date in 2020
~	Returns words in a certain proximity	CM:"zebra star"~3 returns <i>zebra star</i> , <i>star zebra</i> , and <i>zebra on a star</i>  Does not return <i>zebra on a rocket to the stars</i>

## Logical operators

You can use logical operators to create multiple line searches.

Operator	Explanation	Search example
AND	Only returns results that meet additional search statements	CM:*dog* AND LD:true
OR space	Returns results that meet one of multiple search statements	IC:009 OR IC:016  CM:(*hip* *hop*)
AND NOT	Exclude results that meet search statements	GS:toy* AND NOT GS:pet*
( )	Groups together search statements to be modified by field or operator	IC:(009 a b 200)  (1 AND 2) OR 4

## Field tag searching with regular expressions

The new search system includes an optional syntax called regular expressions (or “regex”) that allows you to do the same phonetic searching you did with TESS.

You don’t need to learn regex searching to use the system, but it does allow for more efficient searching in the database.

### How to trigger regular expression searching

Every regex begins and ends with a forward slash (“/”).

Regex component	Explanation	New search
/	Triggers the ability to search phonetically using pattern matching	/w[iy][ck]{1,2}et/ <i>finds alternate spellings of the word wicket</i>

### Common phonetic equivalent combinations

Like TESS, the new search system allows you to find marks that sound like your mark (the phonetic equivalent). However, the new search system and TESS use different characters and syntax.

Sound	Example	TESS	New search
Hard K	CAT; KITE; FOX	{“ckqx”} or {“ckqx”:2}	[ckqx] or [ckqx]{1,2}
Soft S	SOUP; SCENE; ZEN	{“scz”} or {“scz”:2}	[scz] or [scz]{1,2}
F/PH	FUN, PHONICS	{“fph”} or {“fph”:2}	[fph] or [fph]{1,2}
J/G	GENIUS, JEANS, LEDGER	{d0:1}{“gj”}{“eiy”1:2}	d{0,1}[gj][eiy]{1,2}
Soft Y	CANYON, HALLELUJAH	{“jy”:2}	[jy]{1,2}
SH	OCEAN, SURE	{“scz”}{“h”0:1}	[scz]h{0,1}
CH	MATCH, INCH	{“t”0:1}c{“ch”}	t{0,1}c[ch]
TION	ACTION, FASHION	{“scth”:3}{v:2}n	[scth]{1,3}[aeiouy]{1,2}n
ITE/IGHT	MITE, MIGHT	{“iy”}{“gh”0:2}t	[iy][gh]{0,2}t
A	MAKE, FAIR, PAY	a{“iey”0:1}	a[eiy]{0,1}

## Regex wildcards

Use wildcards in your search term to match any character except for an empty space. You can use them anywhere in the search term and in any field, but **don't** use them inside quotations.

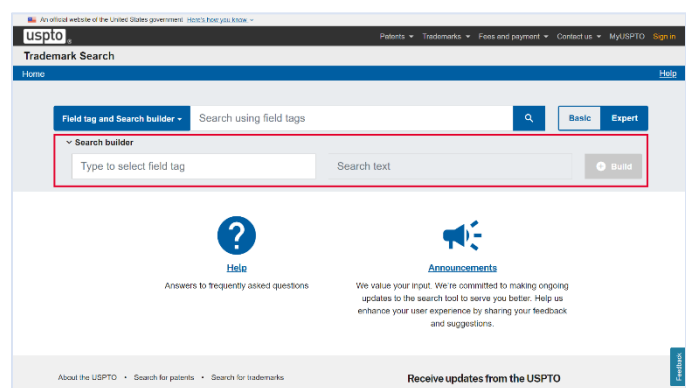
As you can see below, the asterisk and question mark wildcards work differently in regex.

Wildcard	Explanation	TESS	New search
.	Match exactly one instance of <b>any character</b> except space	d?g	/d.g/
.{0,n}	Match 0 to <i>n</i> instances of <b>any character</b> except space	test\$2r	/test.{0,2}r/
.*	Match 0 or more instances of <b>any character</b> except space	*{"ckq"}{"a":2}{"n":2}\$t* (internal truncation)  *d{"oa"}g* (front/end truncation)	/.*[ckq]a{1,2}n{1,2}.*t.* / (internal truncation)  /.*d[oa]g.* / (front/end truncation)
*	Repeats the preceding character 0+ times		/cat*/ finds ca, cat, catt, cattt, <i>but not</i> cats
?	Repeats the preceding character 0-1 times		/fis?t/ finds fit <i>and</i> fist
+	Repeats the preceding character 1+ times		/com+/ finds com, comm, <i>and</i> commm

## Search builder

Use the search builder tool to construct complex searches while you're learning the search syntax.

- Simply choose the field you want to search.
- Enter your search term, including any wildcards or regular expressions.
- Select **Build** to add the search to the search bar.
- You can then initiate the search, add additional search terms, or even edit the search in the search bar.



## Sample searches

### How TESS and new search differ

- Compare knock-out search strings for this trademark: CAT

TESS	New search
cat[comb]	CM:cat

- Compare pattern-matched search strings for this trademark: CAT

TESS	New search
{"ckq"}{"a"1:2}t[comb]	CM:/[ckq]a{1,2}t/

- Compare truncated search strings for this trademark: RABBITY

TESS	New search
r{v}{"b"1:2}{v}t*[comb]	CM:/r[aeiouy]b{1,2}[aeiouy]t.* /

- Compare truncated search strings for this trademark: RRRRABBITY

TESS	New search
*r{v}{"b"1:2}{v}t*[comb]	CM:/.*r[aeiouy]b{1,2}[aeiouy]t.* /

- Compare truncated search strings for this trademark: CAN'T

TESS	New search
*{"ckq"}{"a"1:2}{n"1:2}\$t*[comb]	CM:/.*[ckq]a{1,2}n{1,2}.*t.* /

- Compare truncated search strings for live versions of this trademark: CAT

TESS	New search
*{"ckq"}{"a"1:2}t*[comb] and live[lid]	CM:/.*[ckq]a{1,2}t.* / AND LD:true

- Compare truncated search strings for live, registered versions of this trademark: CAT

TESS	New search
*{"ckq"}{"a"1:2}t*[comb] and live[lid] and registrant[ow]	CM:/.*[ckq]a{1,2}t.* / AND LD:true AND RN:*

- Compare truncated search strings for live, registered versions of this trademark on the Principal Register: CAT

TESS	New search
*{"ckq"}{"a"1:2}t*[comb] and live[lid] and registrant[ow] and principal[rg]	CM:/.*[ckq]a{1,2}t.* / AND LD:true AND RN:*

## Common search strings

For your convenience, use the search strings below to execute common searches. Replace the words in **bold** with the terms you want to search. You don't need to use bold when actually searching.

- Search for all applications filed by a particular attorney.
  - AT:**name**
- Search for all applications filed by a particular owner.
  - OW:**name**
- Search for all applications filed by a particular owner in the month of July, 2023.
  - OW:**name** AND FD:[20230701 TO 20230731]
- Search for all applications filed by a particular owner from July, 2023 to present.
  - OW:**name** AND FD:[20230701 TO \*]
- Search for all applications registered by a particular owner.
  - OW:**name** AND RN:\*
- Search for all live, pending applications.
  - (SN:\* AND LD:true) AND NOT RN:\*
- Search for all live, unregistered trademarks that have published for opposition.
  - (PO:\* AND NOT RN:\*) AND LD:true
- Search for all live, registered trademarks.
  - RN:\* AND LD:true
- Search for all live trademarks containing a particular word.
  - CM:**word** AND LD:true
- Search for all live trademarks containing a particular word in a particular coordinated class.
  - CM:**word** AND LD:true AND CC:**000**
- Search for all live trademarks containing a particular word in a particular international class.
  - CM:**word** AND LD:true AND IC:(**000** 035 042 a b 200)
- Search for all live trademarks containing a particular word and used with particular goods or services.
  - CM:**word** AND LD:true AND GS:(**goods1 goods2**)
- Search for all live trademarks used with particular goods or services.
  - LD:true AND GS:(**goods1 goods2**)

## Combined line searches

To execute combined line searches, make sure you're in expert mode.

### Trademark examples

Let's say you want to search for live applications and registrations that contain the mark: DOG TOY. Compare two alternative ways of searching.

- Alternative 1
  1. CM:dog AND LD:true
  2. CM:toy AND LD:true
  3. 1 AND 2
- Alternative 2
  - CM:"dog toy" AND LD:true

Alternative 1 requires you to execute three separate searches, but also allows you to search the words DOG and TOY both individually and together.

### Attorney examples

Let's say you're attorney Jane Smith and want to find all your filed applications and registrations, but aren't sure whether you are listed as "Jane Smith," "Smith, Jane," or with your middle initial. Compare three alternative ways of searching.

- Alternative 1
  1. AT:jane
  2. AT:smith
  3. 1 AND 2
- Alternative 2
  - AT:("jane smith" OR "smith, jane" OR "jane d smith")
- Alternative 3
  - AT:"jane smith"

Alternative 1 allows you to find all applications and registrations that include both JANE and SMITH in the attorney field. But it will also return results that include, for example, both JANE DOE and JOHN SMITH in the attorney field.

Alternative 2 allows you to find all your applications and registrations, but will also return those with, for example, "JOHN SMITH, JANE DOE" listed together in the attorney field.

Alternative 3 won't return results with your surname first or that include your middle initial.

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