TRADEMARK CLEARINGHOUSE

API OT&E User Manual

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1. Introduction

1.1. Document Purpose

The purpose of this document is to describe how to use the Trademark Clearinghouse API Operational Test and Evaluation Platform (API OT&E platform).

1.2. Scope

The scope of this document is to walk you through the basics of the API OT&E platform, including the platform description and step-by-step procedures for conducting tests on the platform.

Note: The API OT&E platform is under development and thus subject to change. The screens within this document may vary from the actual final screens.

1.3. Intended Audience

This user manual is intended for TMCH agents that have a contract with the Clearinghouse and want access to the API OT&E platform.

2. API OT&E Platform Overview

The Trademark Clearinghouse is a global repository for trademark data, designed to meet global needs for the domain name system (DNS).

The Trademark Clearinghouse verifies trademark data from multiple global regions and maintains the verified trademark record database.

An Application Programming Interface (API) has been created to allow users to interact with the data stored in the Clearinghouse database (TMCH database). The API OT&E platform allows the users to test the API without the risk of disturbing the production platform.

This chapter provides a general overview of the web-based API OT&E platform. It explains how to access the platform and how the platform differs from the production platform.

2.1. Getting Access to the API OT&E

Note: Access to the API OT&E environment is available only for trademark agents.

To get access credentials to the API OT&E platform, you need to be registered with the Trademark Clearinghouse as a trademark agent. Using your credentials on the PRODUCTION environment, you'll need to log a support ticket requesting credentials for the OT&E environment. The support team will follow up and will provide you with your API OT&E credentials (that is, your test account) and the URLs necessary to access the OT&E web interface and the API interface.

2.2. API OT&E platform vs the Production Platform

The API OT&E platform differs from the production platform in appearance and functionality.

To avoid users mistaking the test environment for the production environment, warnings and different colours are used to indicate that they are not in the production platform:

API OT&E Platform

Production Platform

Unlike the production platform, the API OT&E platform does not allow you to:

- Raise a support case.
- Register trademarks via the API interface, no button available.
- Change your password. For details on how to change your password, see Changing Password.
- Manually upload data using the web interface. The API OT&E platform is only intended to exchange data with another automated system.

2.3. Logging in

Note: Only trademark agents can access the API OT&E platform.

To access the API OT&E platform use the following links and ports:

- API Access Settings: https://ote.trademark-clearinghouse.com
- API Server (V2): ote-api.trademark-clearinghouse.com port 7701 with TLS

To log in, use the API OT&E credentials you received by email.

2.4. Changing Password

To change your API OT&E password, on the production environment, go to the self-service system and submit a case. For details on how to access the self-service system and submit a case, see the Self-service System User's Guide.

3. Using the API OT&E Platform

This section describes the step-by-step procedures for conducting API tests.

The tests contain the following generic steps:

1. Configure the connection. For information on how to configure the connections, see Configuring the connections.

2. Perform the test. For information on how to perform specific test scenarios, see Test Scenarios.

3. Validate the test. For information on how to validate specific test scenarios, see Test Scenarios.

3.1. Configuring the connections

To configure the connections to the TMCH test database:

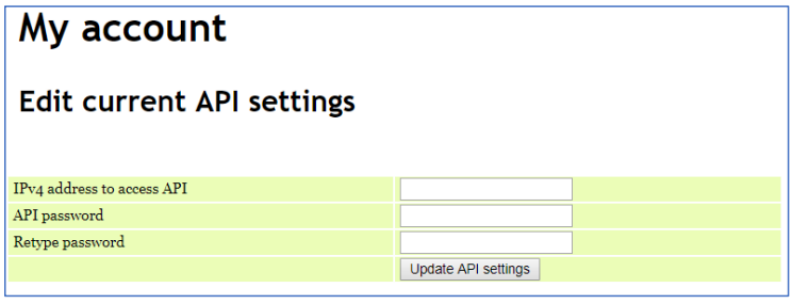
1. Open a browser and go to the API web interface, that is https://ote.trademarkclearinghouse.com.

2. Login using the API OT&E credentials you received by email.

3. In the upper-left corner of the API web interface, click the My Account button. Your account details and settings will be displayed.

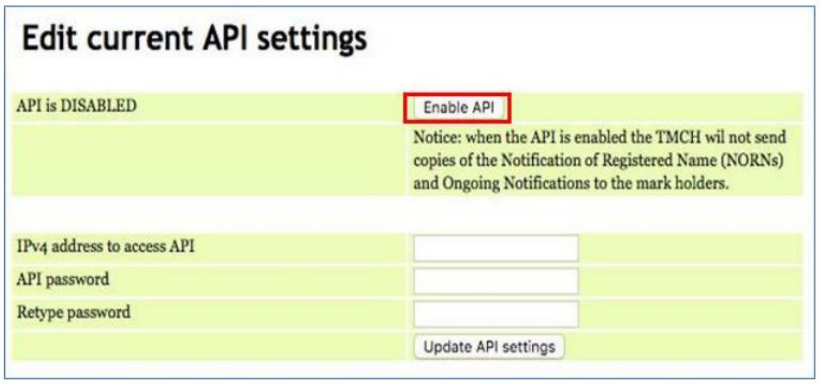
4. Scroll-down to the List of submission section and click the API settings link. The page to edit current API settings will be displayed.

5. Insert your IPv4 address and your API OT&E password of choice, retype the password and click the Update API settings button.



The Enable API button will be displayed.

6. Optionally, you can choose for the TMCH not to send copies of the Notification of Registered Name (NORNs) and Ongoing Notifications to the mark holders, by enabling the API. To do so, click the Enable API button.



The connections to the TMCH test database are now successfully configured. You can start exchanging information with the TMCH test database through the test API.

To create a new session with the API v2, use the API commands described in the TMCH API Command Reference.

3.2. Performing the Tests

Once you configure the connection to the TMCH test database, you can execute the tests by entering trademarks (marks) into the API OT&E. The API v2 data exchange with the TMCH test database uses XML formats as described in the Clearinghouse TMCH Automated interface manual. The necessary API commands used are similar to the ones described in the Clearinghouse TMCH Automated interface manual. For testing with API v2 refer to the related TMCH API Command Reference.

For detailed information on how to test using the APIv2 and to get the XSD schemes, see the TMCH API2 Documentation and XSD.

Various tests have been designed in order to test the connections with the API OT&E

3.2.1. Testing Marks

- Mark names containing the string “VERIFIED” are processed according to test scenario 1, described in section 4.1.1.
- Mark names containing the string “INCORRECT” are processed according to test scenario 2, described in section 0.
- Mark names containing the string “INVALID” are processed according to test scenario 3, described in section 4.1.3

3.2.2. Testing Proof of Use

- Proof Of Use (POU) files belonging to a specific mark name with a filename containing the string “VALID” are processed according to test scenario 4, described in section 4.2.1.
- Proof Of Use (POU) files belonging to a specific mark name with a filename containing the string “INCORRECT” are processed according to test scenario 5, described in section 0.
- Proof Of Use (POU) files belonging to a specific mark name with a filename containing the string “INVALID” are processed according to test scenario 6, described in section 4.2.3.

3.2.3. Testing Court Cases and UDRP cases

- UDRP cases containing string “VALID” in CASENO (or in REFNUM for court cases) are processed according to test scenario 7, described in section 4.3.1
- UDRP cases containing string “INVALID” in CASENO (or in REFNUM for court cases) are processed according to test scenario 8, described in section 0
- UDRP cases containing string “INCORRECT” in CASENO (or in REFNUM for court cases) are processed according to test scenario 9, described in section 4.3.3
- UDRP cases or court cases being corrected are processed according to test scenario 10, described in section 4.3.4

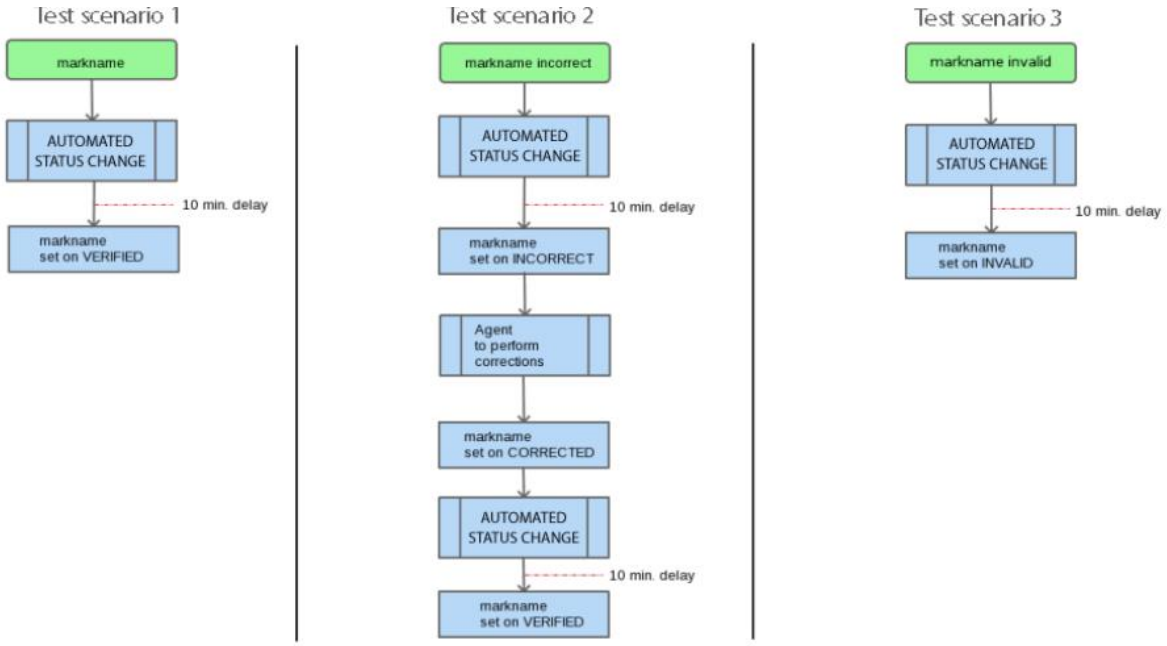
Marks that have no labels that contain the strings “VERIFIED”, “INCORRECT” or “INVALID” will be processed as “VERIFIED” according to test scenario 1. POU files that have filenames that do not contain the strings “VALID”, “INCORRECT” or “INVALID” will be processed as “VERIFIED” according to test scenario 4.

4. Test Scenarios

This section describes the test scenarios that have been created:

4.1. Marks Verification Test Scenarios

All trademarks will be processed. The domain convention will determine how the “marks” are processed. Three scenarios are possible:



4.1.1. Test scenario 1: The mark has been verified.

To test that a (correct) mark is accepted, perform and validate these steps:

Step No.	Step	Validation
1	Enter a mark into the API with a label containing the string “VERIFIED”.	The mark has been approved. The mark status is “VERIFIED”.
2	Wait for 10 minutes as the mark is processed with a 10-minute delay.	
3	Check the mark status by reading the messages received via the poll message.	

4.1.2. Test scenario 2: The mark needs to be corrected

To test that a (incorrect) mark is rejected, perform and validate these steps:

Step No.	Step	Validation
1	Enter a mark into the API with a label containing the string "INCORRECT".	The mark has been rejected. The mark status is "INCORRECT".
2	Wait for 10 minutes as the mark is processed with a 10-minute delay.	
3	Check the mark status by reading the messages received via the poll message.	
4*	Run the API `info` command**.	You will see the mark data including the reason why the mark has been rejected and the validator's comments which will guide you to make mark corrections in the production platform.
5*	Run the API `update` command** and correct the mark.	The mark has been corrected approved. The mark status is "VERIFIED".
6*	Wait for 10 minutes as the mark updates are processed with a 10-minute delay.	
7*	Check the mark status by reading the messages received via the poll message.	

* Optional steps, only use these steps if you want to make mark corrections.

**All API commands are described in the Clearinghouse TMCH Automated interface manual.

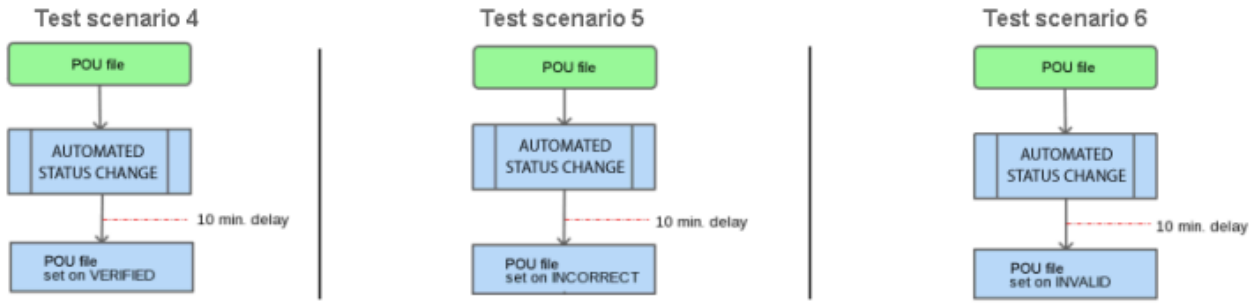
4.1.3. Test scenario 3: The mark is invalid

To test that an invalid mark is rejected, perform and validate these steps:

Step No.	Step	Validation
1	Enter a mark into the API with a label containing the string "INVALID".	The mark has been rejected. The mark status is "IINVALID".
2	Wait for 10 minutes as the mark is processed with a 10-minute delay.	
3	Check the mark status by reading the messages received via the poll message.	

4.2. Proof Of Use Test Scenarios

The POU filename convention will determine how the POU files are processed. Three scenarios are possible:



4.2.1. Test scenario 4: The Proof of Use is valid

To test that a POU file is accepted, perform and validate these steps:

Step No.	Step	Validation
1	Enter a POU into the API with a filename containing the string "VALID".	The POU file has been accepted. The POU status is "VALID".
2	Wait for 10 minutes as the POU file is processed with a 10-minute delay.	
3	Check the POU status by reading the messages received via the poll message.	

Notes:

If you submit multiple POU files for a specific mark, only the last file is validated.

If you submit one or multiple POU files for an invalid mark, no POU file will be validated.

4.2.2. Test scenario 5: The Proof Of Use file is incorrect

To test that an incorrect POU file is rejected, perform and validate these steps:

Step No.	Step	Validation
1	Enter a POU into the API with a filename containing the string "INCORRECT".	The POU file has been rejected. The POU status is "INCORRECT".
2	Wait for 10 minutes as the POU file is processed with a 10-minute delay.	
3	Check the POU status by reading the messages received via the poll message.	

Notes:

If you submit multiple POU files for a specific mark, only the last file is validated.

If you submit one or multiple POU files for an invalid mark, no POU file will be validated.

4.2.3. Test scenario 6: The Proof Of Use file is invalid

To test that an invalid POU file is rejected, perform and validate these steps:

Step No.	Step	Validation
1	Enter a POU into the API with a filename containing the string "INVALID".	The POU file has been rejected. The POU status is "INVALID".
2	Wait for 10 minutes as the POU file is processed with a 10-minute delay.	
3	Check the POU status by reading the messages received via the poll message.	

Notes:

If you submit multiple POU files for a specific mark, only the last file is validated.

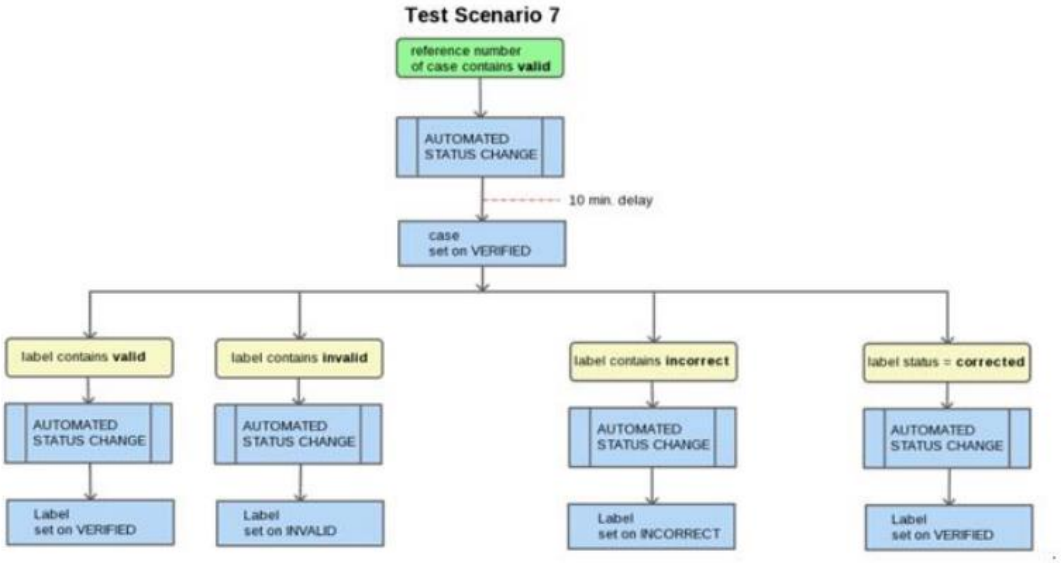
If you submit one or multiple POU files for an invalid mark, no POU file will be validated.

4.3. Court Cases and UDRP Test Scenarios

This section describes the test scenarios for testing court cases using the API. Testing UDRP scenarios is similar.

4.3.1. Test scenario 7: Court case is valid

The figure below describes how a valid court case is processed.



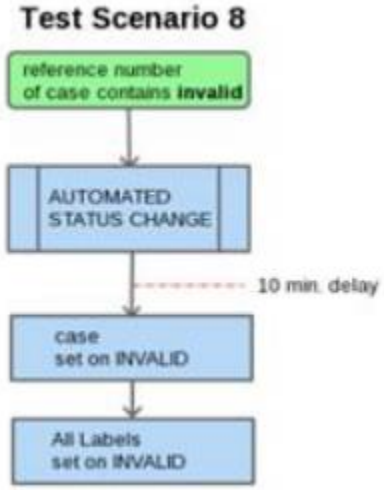
To test that a valid court case is accepted, perform and validate these steps:

Step No.	Step	Validation
1	Enter a court case into the API with a REFNUM containing the string 'VALID' and provide in the associated labels the status string ('VALID', 'INVALID', 'INCORRECT' or 'CORRECTED')	The court case and associated labels are processed.
2	Wait for 10 minutes as the court case is processed with a 10-minute delay.	
3	Run the API `info` command.	Court case details will be displayed, including the case status and the associated label status.
4	Check the court case status by reading the messages received via the poll message.	

UDRP cases are processed similarly based on the CASENO value containing the string 'VALID'.

4.3.2. Test scenario 8: Court case is invalid

The figure below describes how an invalid court case is processed.



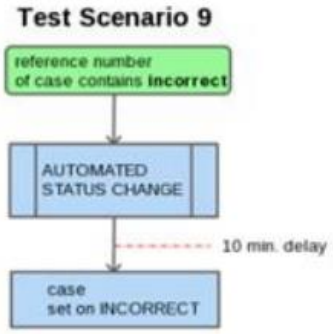
To test the process for an invalid court case, perform and validate these steps:

Step No.	Step	Validation
1	Enter a court case into the API with a REFNUM containing the string 'INVALID'.	The court case and associated labels are processed.
2	Wait for 10 minutes as the court case is processed with a 10-minute delay.	
3	Run the API `info` command.	Court case details will be displayed, including the case status and the associated label statuses.
4	Check the court case status and the label statuses.	All labels have the status 'INVALID'.

UDRP cases are processed similarly based on the CASENO value containing the string 'INVALID'.

4.3.3. Test scenario 9: Court case is incorrect

The figure below describes how an incorrect court case is processed.



To test the process for an incorrect court case, perform and validate these steps:

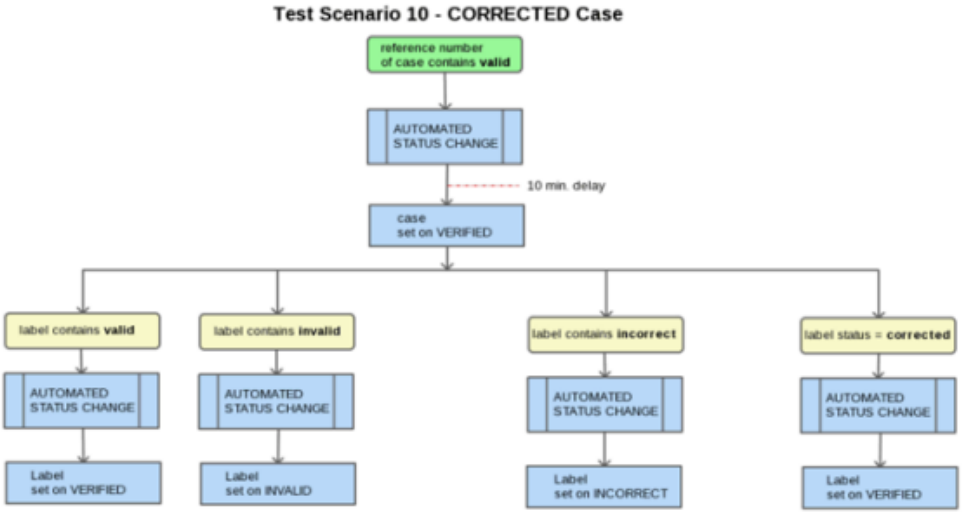
Step No.	Step	Validation
1	Enter a court case into the API with a REFNUM containing the string 'INCORRECT'.	The court case and associated labels are processed.
2	Wait for 10 minutes as the court case is processed with a 10-minute delay.	
3	Run the API `info` command.	Court case details will be displayed, including the case status and the associated label statuses.
4	Check the court case status and the label statuses.	Labels have not been updated.

UDRP cases are treated in the same way based on the CASENO value containing the string 'INCORRECT'.

4.3.4. Test scenario 10: Court case is corrected

For a corrected case, various options are possible.

The figure below describes an example when the REFNUM is set to 'VALID':



To test the process for a corrected court case, perform and validate these steps:

Step No.	Step	Validation
1	Enter a court case into the API with a REFNUM containing the string 'VALID' and provide in the associated labels the status string ('VALID', 'INVALID', 'INCORRECT' or 'CORRECTED'). Next to 'VALID' you can set a corrected case to 'INVALID' or 'INCORRECT'.	The court case and associated labels are processed.
2	Wait for 10 minutes as the court case is processed with a 10-minute delay.	
3	Run the API `info` command.	Court case details will be displayed, including the case status and the associated label statuses.
4	Check the court case status and the label statuses.	The case status has changed to 'INVALID' or 'INCORRECT' as per your correction. Associated labels will get their desired status using the chosen string ('VALID', 'INVALID', 'INCORRECT' or 'CORRECTED').

UDRP cases are processed similarly based on the CASENO value containing the string 'VALID','INVALID' or 'INCORRECT'.

5. FAQ

Question: Can I test the API before registering?

Answer: No. Access to the test API OT&E is available only for trademark agents. Once your agent account has been verified by the Trademark Clearinghouse personnel, log into the PRODUCTION environment and from the Support page submit a case requesting credentials for the OT&E environment. The support team will follow up and will provide you with your API OT&E credentials (that is, your test account) and the URLs necessary to access the OT&E web interface and the API interface.

Question: I have lost my password for my test account; how can I retrieve it?

Answer: You are not able to change or recover your password via the API web interface. To recover your password, go to the production platform and submit a case.

Question: Can I use the same machine (IP address) to access the test environment and the production environment?

Answer: Yes. This IP address is then registered as a “safe” IP address to which both the API OT&E platform and the TMCH production platform may communicate.

Question: Can I import the data generated while performing tests in the API OT&E platform into the TMCH production

Answer: No, there is no link between the two platforms.

6. Glossary

Term	Description
API	Application Programming Interface. An application programming interface (API) that specifies how software components interact with each other. In practice, an API is a library that usually includes specification for routines, data structures, object classes, and variables.
API OT&E platform	Trademark Clearinghouse API Operational Test and Evaluation Platform. A test platform to test the TMCH API without the risk of disturbance on the production platform.
DNS	Domain Name System
Label	The domain name without its TLD extension
TMCH	Trademark Clearing House is an ICANN central repository for information to be authenticated stored and disseminated, pertaining to the rights of trademark holders.
Mark, Trademark	Marks (trademarks) are used to claim exclusive property rights of products and/or services. A mark is typically a name, word, phrase, logo, symbol, design, image, or a combination of these elements. Registered Trademarks/Court Validated Marks/Marks are protected by statute or treaty.
POU	**Proof Of Use**: A file that contains evidence of ownership of a mark name. These files may be in .PDF or .JPG format.
TLD	Top Level Domain
UDRP	Uniform Dispute Resolution Policy