

Patent Public Search – Tagging documents

Quick Reference Guide 2025



You can tag documents in Patent Public Search's Advanced Search interface to indicate any criteria. Tagged documents can then be saved to an L#, printed, or citation searched.

Add Tags to documents

1. Run a search.
2. From the **Search Results** tab, check boxes in the numbered **Tags** columns to tag documents; see **Figure 1**. Or, in the **Search Results** tab or **Document Viewer** tab, use keyboard shortcuts **a**, **b**, etc. for tags **1,2**, etc. (e.g., **a** = 1, **z** = 26, etc.) or **Alt+1**, **Alt+2**, etc. for tags 1, 2...9 (only).
3. Alternately, press the asterisk * on the numeric keypad to tag (only) 1. Press Ctrl+1, +2, etc. to remove tags.

The screenshot shows the 'Search Results' tab in the Patent Public Search interface. At the top, there are tabs for 'Search Results', 'Hit Terms', and 'Help'. Below the tabs is a search bar and a 'Settings' dropdown. A 'Highlight' section shows various tags: mounted, vehicle, mounting, vehicles, mount, mirror, mirrors, mountain, mounts, mouter, mountedl, mountant. Below this, it says 'L5: 5981 results found. Currently displaying results 1 - 500. Filtered by Family ID (4424 families)'. The main table has columns: Select, Res..., X, 1, 2, 3, 4, 5, Document ID, Date Publish..., Family ID, Pages, and Title. The '1' through '5' columns are checkboxes for tagging documents. The '1' column is checked for all 10 results shown. The '2' column is checked for results 2, 3, 4, 6, 7, 8, 9, and 10. The '3' column is checked for results 3, 4, 6, 7, 8, 9, and 10. The '4' column is checked for results 4, 6, 7, 8, 9, and 10. The '5' column is checked for results 5, 6, 7, 8, 9, and 10. The results are listed with their Document ID, Date Published (all 2023-05-16), Family ID (all 10000070...), Pages, and Title.

Select	Res...	X	1	2	3	4	5	Document ID	Date Publish...	Family ID	Pages	Title
<input type="checkbox"/>	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11648852 B2	2023-05-16	10000070...	14	Vehicle
<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11648877 B2	2023-05-16	10000070...	10	Method
<input type="checkbox"/>	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11648941 B2	2023-05-16	10000070...	17	Vehicle :
<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	US 11651594 B2	2023-05-16	10000070...	18	Systems
<input type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	US 11652953 B2	2023-05-16	10000070...	32	Video si
<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11648956 B2	2023-05-16	10000070...	29	Vehicula
<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11648940 B2	2023-05-16	10000070...	12	Vehicle c
<input type="checkbox"/>	8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11651712 B2	2023-05-16	10000070...	34	Display i
<input type="checkbox"/>	9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11650695 B2	2023-05-16	10000070...	68	Display i
<input type="checkbox"/>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US 11653093 B2	2023-05-16	10000070...	25	Focus dr

Figure 1. Search Results with documents tagged

Open tagged documents

1. Click the Tagged Documents icon on the main toolbar; see **Figure 2**.
2. Select a window for the Tagged Documents view; see **Figure 3**.



Figure 2. Tagged Documents icon in main toolbar

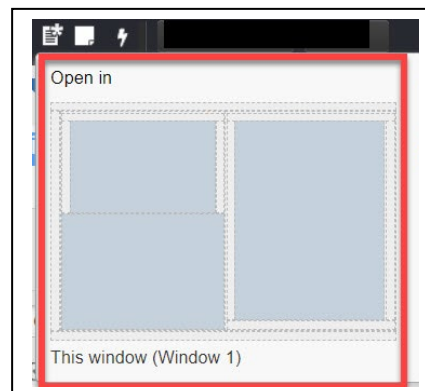


Figure 3. Window options for Tagged Documents view

Set tagged documents preferences

You can set preferences in the **Tagged Documents** tab.

1. Click the **Tagged Documents Preferences** icon; see **Figure 4**. A **Preferences** window appears; see **Figure 5**.
2. Click to select from available preference options.

Hit Terms

- **Select Underline Hit/Term Ref**; see **Figure 5**. (Highlight Display cannot be changed from default.)

Fonts

- **Fonts**: Use the drop down arrow next to the **Font** and **Font Size** options to choose a font for all text; see **Figure 6**. Check the box next to **Bold** to bold all text.

Colors

- The default color theme is black text on a white background.
- Click the **Custom Colors** radio button to select custom colors; see **Figure 7**.
 - Click in the **Text Color** box, navigate to and click a new text color; click **OK**.
 - Click in the **Background** box, navigate to and click a new background color; click **OK**.
- 3. After selecting preferences, click **Apply Changes** to save changes in the **Tagged Document** tab.

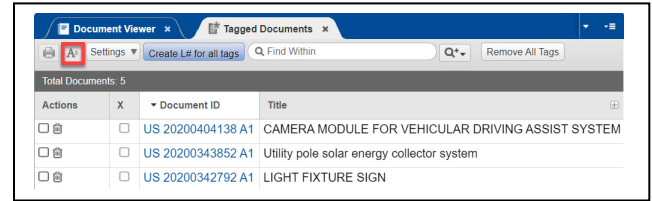


Figure 4. Tagged Documents preferences icon

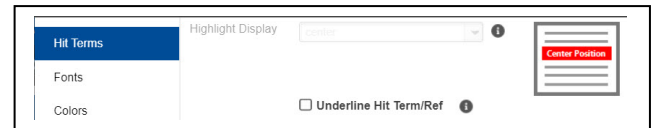


Figure 5. Preferences window – Hit Terms options



Figure 6. Preferences window – Fonts options

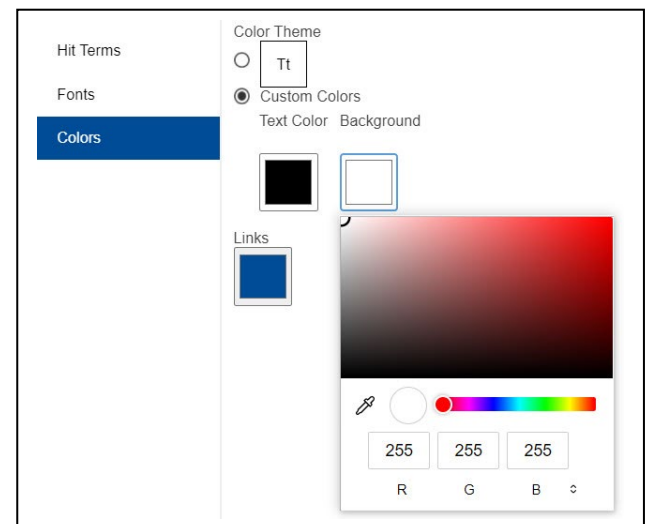


Figure 7. Preferences window - Colors options

Notes

- Saved settings become the new default for all workspaces.
- Click the **Reset All Preferences** button to return preferences back to default settings.

Tagged Documents settings

In the **Tagged Documents** tab, the **Settings** button provides options for selecting which metadata to view in the tagged records. The button toggles off and on for the Toggle Metadata selections; see **Figure 8**. Check the metadata categories desired for viewing.

Users can also choose which columns to view in the **Tagged Documents** tab.

- 1. Click on the small “+” button appearing at the far right edge of the columns row; see **Figure 9**.
- 2. In the pop-up window select or deselect the columns to view; see **Figure 10**.
- 3. Click on **Restore Default Columns** to return to the default selection of columns.

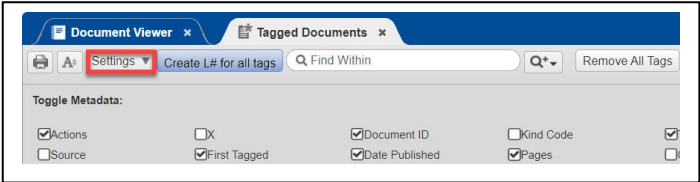


Figure 8. Tagged Documents Settings button

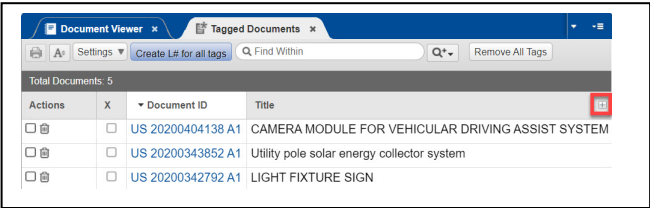


Figure 9. Tagged Documents results column selection button

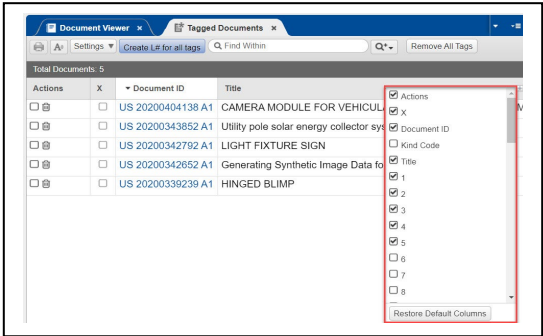


Figure 10. Tagged Documents column selection window

Print tagged documents list

To print a list of selected Tagged Documents, click on the Print icon in the Tagged Documents tab; see **Figure 11**. The resulting list will have columns for Document ID, Date Published, Title and Pages.

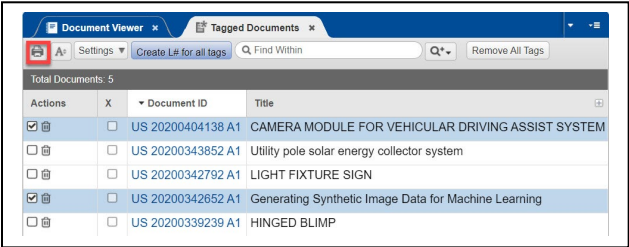


Figure 11. Tagged Documents print icon

Create an L# of tagged documents

In the **Tagged Documents** tab select the **Create L#** button to create a new L# set of the tagged documents; see **Figure 12**.

- The new L# will display in the **Search** tab, **Search History** tab, and **Search Results** tab.

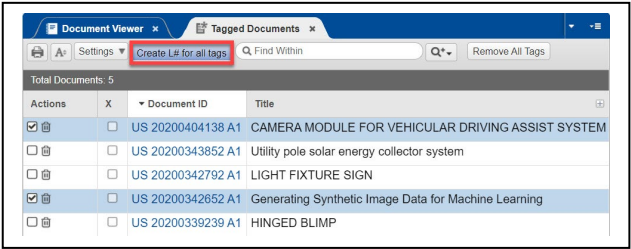


Figure 12. Create L# button

Citation search tagged documents

Users can perform citation searches of selected **Tagged Documents** in the **Tagged Documents** tab:

1. In the **Actions** column, select any or all documents by clicking the box for that document. The document row will change color to blue; see **Figure 13**.
2. Right click inside any selected document. In the pop-up window select **Citations**, then **Backward**, **Forward** or **Simultaneous Backward and Forward**; see **Figure 14**.
3. The citation search will run, and the results can be viewed in the **Search Results** and **Document View** tabs.

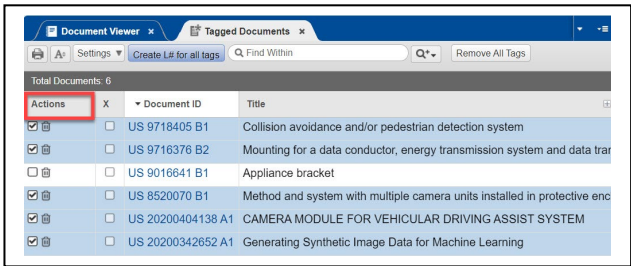


Figure 13. Selecting tagged documents

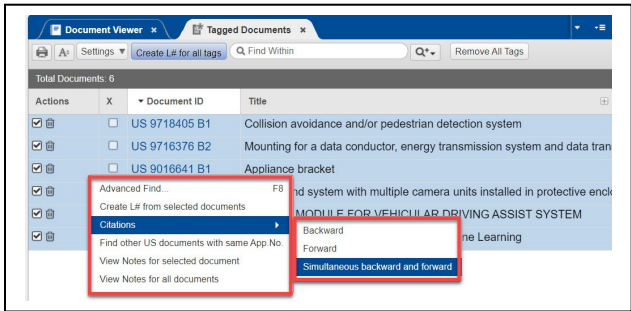


Figure 14. Initiating forward and backward citation search of selected tagged documents

Notes

In initiating a citation search if the pop-up window has ghosted out the Backward citation choice, your Tagged Documents are likely all Pre-Grant Published Patent Applications which have no backward citations.