

Patent Public Search – Tagging documents



Quick Reference Guide 2023

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 a web browser window with two tabs: 'Search Results' and 'Search History'. The 'Search Results' tab is active, displaying a search interface with a 'Find Within' search bar and a 'Highlight' section containing tags: side, mounted, sides, mounting, vehicle, vehicles, car, mount, mirror, auto. Below the search bar, it indicates 'L1: 1610 results found. Currently displaying all results. Filtered by Family ID (956 families)'. A table of search results is shown with columns for 'Select', '+', 'Res...', '1', '2', '3', '4', '5', 'Document ID', and 'Date Published'. The '1' through '5' columns represent tags, and checkboxes are present in these columns for rows 1 through 5. Row 5 has checkboxes checked in columns 1, 4, and 5.

| Select | + | Res... | 1 | 2 | 3 | 4 | 5 | Document ID | Date Published |
|-------------------------------------|---|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------|----------------|
| <input type="checkbox"/> | | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | US 20200404138 A1 | 2020-12-24 |
| <input type="checkbox"/> | | 2 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | US 20200342652 A1 | 2020-10-29 |
| <input type="checkbox"/> | | 3 | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | US 20200339239 A1 | 2020-10-29 |
| <input type="checkbox"/> | | 4 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | US 20200342792 A1 | 2020-10-29 |
| <input checked="" type="checkbox"/> | | 5 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | US 20200343852 A1 | 2020-10-29 |

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

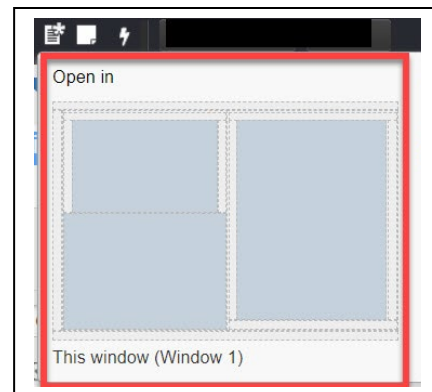


Figure 3. Window options for Tagged Documents view

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.

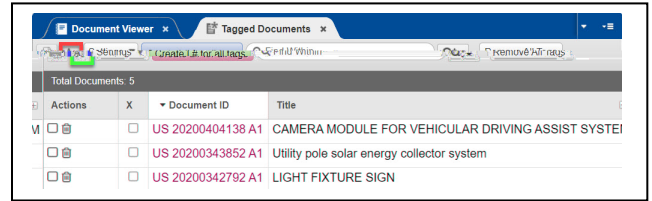


Figure 4. Tagged Documents preferences icon

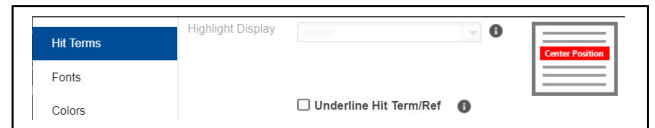


Figure 5. Preferences window – Hit Terms options



Figure 6. Preferences window – Fonts options

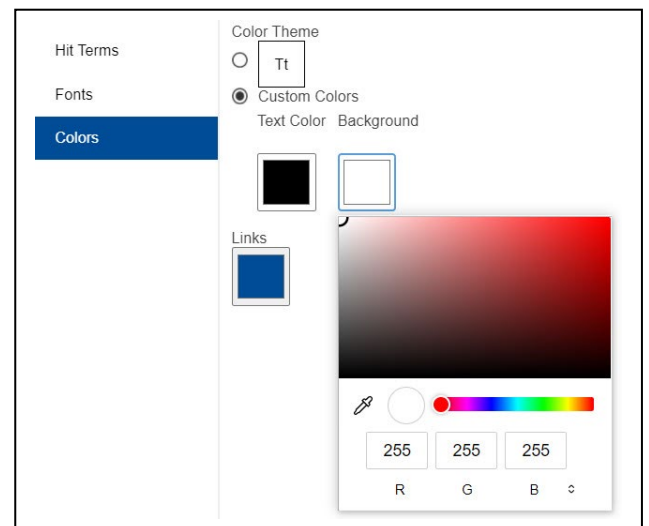


Figure 7. Preferences window - Colors options

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.

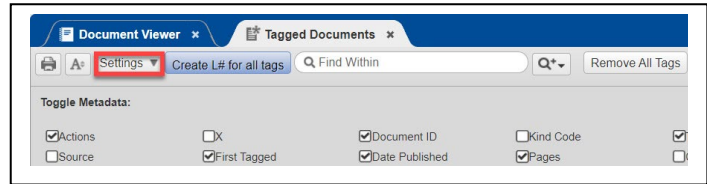


Figure 8. Tagged Documents Settings button

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.

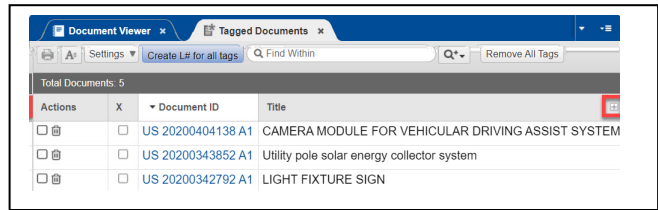


Figure 9. Tagged Documents results column selection button

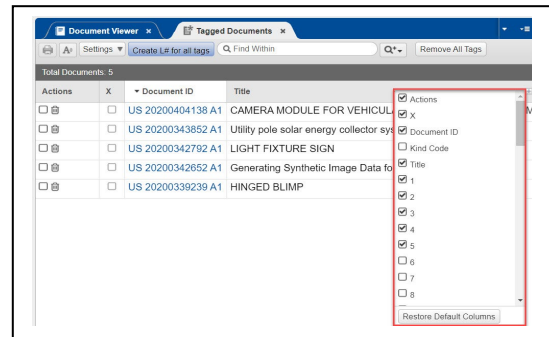


Figure 10. Tagged Documents column selection window

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.

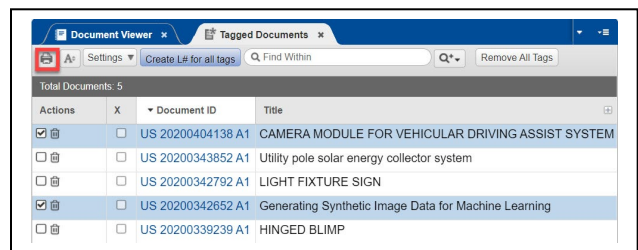


Figure 11. Tagged Documents print icon

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.

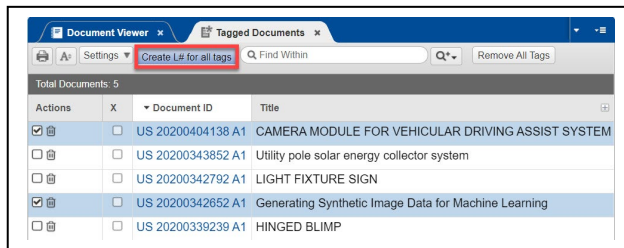


Figure 12. Create L# button

Citation search tagged documents

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

- 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**.
- Right click inside any selected document. In the pop-up window select **Citations**, then **Backward**, **Forward** or **Simultaneous Backward and Forward**; see **Figure 14**.
- The citation search will run, and the results can be viewed in the **Search Results** and **Document View** tabs.

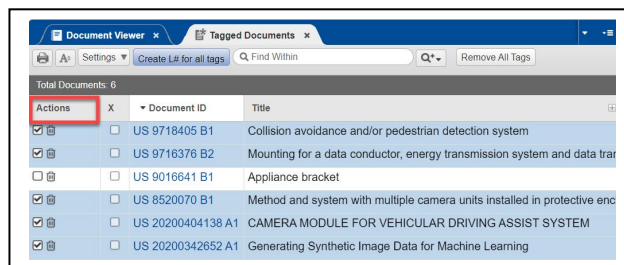


Figure 13. Selecting tagged documents

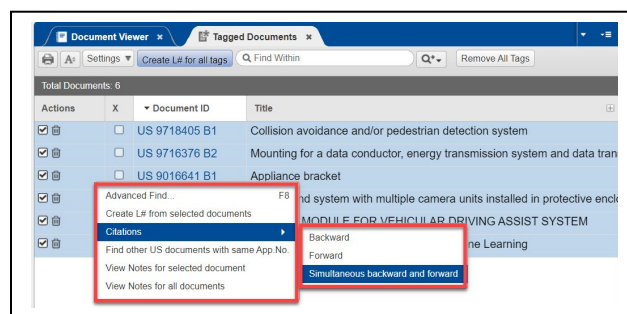


Figure 14. Initiating forward and backward citation search of selected tagged documents

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.