You can tag documents in Patent Public Search 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.

![Figure 1. Search Results with documents tagged](image1)

**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](image2)

![Figure 3. Window options for Tagged Documents view](image3)
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.

**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.

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.
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.

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.

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.