Advanced Search
Legal Research Center Video Series

Julianne Odin
What we will cover

Advanced search techniques, including:

• Search settings
• Choosing terms
• Connectors (AND, OR, and beyond)
• Processing order
Search settings

Note the following settings which affect search results in significant ways:

**Lexis**
- Include legal phrase equivalents with search

**Westlaw**
- Always run these searches as Boolean Terms and Connectors:
  - Searches containing **AND**, **OR**, &`, or quoted phrases
  - Searches containing only a single quoted phrase
What would you like to research today?

Enter a source name, a citation, terms or shep: [citation] to Shepardize®

Advanced Search

Explore

Content

Cases

Statutes & Legislation

Statutory Codes

Archived Codes

Administrative Codes

Administrative Materials

Arbitration Materials

Secondary Materials

Treatises & Guides

Law Reviews & Journals

Sample Forms

News

Legal News

Intellectual Property

Dockets (CourtLink)

Briefs, Pleadings & Motions

Expert Witness Materials

Jury Verdicts & Settlements

Jury Instructions

Public Records

Company & Financial Directories

Scientific Materials

Custom Pages

COVID-19 Resources

View complimentary COVID-19 resources.

Social Justice Resources

View complimentary Racial Equality, Police Reform & Protesters’ Rights Resources.
Display this page by default when signing in

Search

- Include legal phrase equivalents with search
- Recognize and use legal entities when performing a search

Search Filters

- Keep my search filters from one search to the next

Include search suggestions from the following groups

- Legal phrases
- Suggested Questions
- Documents
- Sources

Results

Display search results in this category first

Preferred results set display

- Standard (Shows top results)
- Expanded (Shows all results)

Category Display

Case law (does not apply in condensed view)

- Show Overview (Shows an editorial summary of the document)
- Show Terms (Shows the overview plus a view of search terms in context)
- Show Extract (Shows the overview plus a view of a section of the document)
Preferences

Search

Always run these as Terms and Connectors searches
- Searches containing AND, OR, &, or quoted phrases
- Searches containing only a single quoted phrase

Document display
- Hide search highlighting in documents by default

Boolean Terms & Connectors result list snippet settings

Save  Cancel
Natural language searches

- Default search method on both Lexis and Westlaw
- Similar to Google searches—enter a search phrase in plain English
- Common words like “is” and “for” may be ignored
- Key concepts in the phrase may be automatically identified, such as legal terms of art
- Variations of terms you’ve entered may be automatically included (“defamed” → “defamation”)
Why use advanced searching?

Versus natural language searches:

- More control and precision can produce more relevant results
- Increased efficiency: can reduce research time (and, therefore, save your firm/client money)
- Heavily used in practice

Note: You cannot mix natural language and terms and connectors search phrases.
Terms & connectors

How to specify a search:

- **Lexis**: if search phrase includes a connector such as *AND* or *OR* (but not the root expander or wildcard characters), it will automatically be run as a terms and connectors search.

- **Westlaw**: by default, if search phrase includes a proximity connector, a root expander, or wildcard, it will be run as a terms & connectors search; optionally, if *AND*, *OR*, or text in quotation marks are included.

Can also start your search query with *advanced:* or *adv:*
Terms & connectors

Terms
  • Words and phrases capturing the core concepts
  • Express legal concepts, factual scenarios

Connectors
  • Commands for searching
  • Choose based on relationships between the terms being connected
  • Neither too broad nor too narrow: connectors have a significant impact on the number of search results returned (both positively and negatively)
Terms

Synonyms
• Ex: noncompete clause, noncompete agreement, covenant not to compete
• Ex: driving under the influence, driving while intoxicated

Antonyms
• Ex: constitutional, unconstitutional
• Ex: buyer, seller

Related concepts
• Ex: alcohol, liquor, spirits, beer, wine, drugs, narcotics
• Ex: defamation, slander, libel
Does the state of Nevada have the death penalty?

Key terms:
- death penalty, Nevada

Related terms (synonyms, antonyms, concepts):
- death sentence, execution, capital punishment, lethal injection
Does the state of Utah forbid the sale of alcohol on Sunday?

Key terms:
- sale, alcohol, Sunday, Utah

Related terms (synonyms/antonyms/concepts):
- sale
  - sell, purchase, buy
- alcohol
  - spirits, beer, wine, liquor
- Sunday
  - Sabbath
Is a café liable for hot coffee spilled on a patron?

Key terms:
• café, hot coffee, spill, patron, liable

Related terms (synonyms/antonyms/concepts):
• café
  • restaurant, bar
• hot coffee
  • hot beverage, drink, liquid, food
• patron
  • customer
• liable
  • responsible
Exact phrases

You can search for an exact phrase by enclosing it in quotation marks: “like this”

- Searches for the phrase exactly as it appears enclosed in quotation marks

- Use carefully
  - “noncompete clause”
    - What about covenant not to compete, noncompetition agreement, noncompete covenant, etc.?

- Useful for terms of art, Latin phrases, etc.
  - “double jeopardy,” “mens rea”
Word variations

Root expander: !

- Substitutes for letters at the end of a root of your choosing
- Use truncation instead of all variations:
  - contract! = contract, contracts, contracted, contracting, contractual
- Proceed carefully: is constit! a good way to truncate “constitution”?

*Note: Lexis allows a terminal * as equivalent to !*
Word variations

Universal character ("wildcard"): *

- Placeholder for single character
- Can use within a term
  - mari*uana = marijuana, marihuana (e.g. Texas statutes)
- May use more than one
  - int**net = internet, intranet
  - bl**d = bleed, blood
- Think critically
  - bl**d = blind, bland, blend

Note: Lexis allows ? as equivalent to *
Basic connectors

AND

- Retrieves documents with all terms
  - *divorce AND insurance*
- Lacks precision
- Use conservatively
Basic connectors

OR

• Retrieves documents with any term
• Variations
  • liable OR liability
• Synonyms
  • car OR automobile OR vehicle

Note: Westlaw treats a space between terms or phrases as an implied OR connector, e.g. car automobile vehicle is interpreted as car OR automobile OR vehicle
Proximity connectors

/n
• Within # of words
  • oral /5 contract

/s
• Within the same sentence
  • execution /s will

/p
• Within the same paragraph
  • administration /p coach
Ensure relevance

**NOT**

- Westlaw: BUT NOT (%)
- Lexis: AND NOT
- Exclude documents with the terms that follow it
- Add to the end of the search phrase:
  - rico % puerto

**ATLEASTn(term)**

- Retrieves documents with the term at least $n$ times
  - ATLEAST5(gravity)
Putting terms & connectors together

How would you reconstruct “noncompete clause” for more effective results?

- No exact phrase
- noncompete OR compete
- noncompet! OR compet!
- clause OR agreement OR covenant
- compet! OR non-compet! /5 clause OR agreement OR covenant
Putting terms & connectors together

• More alternate terms (joined with *OR*) are generally better than fewer.

• Proximity connectors (/n, /s, /p) are generally preferable to *AND*.

• Skew towards broader connectors—if unsure how close to put two terms, use a /p instead of /s.

• Number of results is not an indicator of the quality of the search.
More connectors

Similar (but not identical) across the major platforms

- Westlaw → Advanced (under “Connectors and Expanders” heading)
- Lexis → Advanced → (under “Use Connectors”; click “View all connectors and commands” for more)
Processing order

- Lexis and Westlaw process all connectors in a specific order
- Each connector has a different priority
- Order of processing can drastically affect how terms are searched
Using parentheses

(terms AND connectors) /p “exact phrase”

• Forces search to be processed in the order you want
• Parentheses are always processed first
• Group terms together by concept—helps organize your search

(due /3 process) /20 (fourteenth /2 amendment)

Set 1 = due /3 process
Set 2 = fourteenth /2 amendment
Set 3 = Set 1 results /20 Set 2 results
Basic processing order

**Westlaw**
1. “exact phrase”
2. OR
3. /n
4. /s
5. /p
6. AND

**Lexis**
1. “exact phrase”
2. OR
3. /n, /s, /p
4. AND
Processing order: Example

Multiples of the same connector are processed from left to right

\(rent /s\ deduct /s\ repair\)
- Set 1 = \(rent /s\ deduct\)
- Set 2 = Set 1 results \(/s\ repair\)

Smaller numeric proximity connectors processed first

\(due /3\ process /20\ fourteenth /2\ amendment\)
- Set 1 = \(fourteenth /2\ amendment\)
- Set 2 = \(due /3\ process\)
- Set 3 = Set 2 results \(/20\ Set 1\ results\)
Processing order: Example

14th OR fourteenth /s amendment /p “due process” AND state

• Set 1: “due process”
• Set 2: 14th OR fourteenth
• Set 3: Set 2 results /s amendment
• Set 4: Set 3 results /p Set 1 results
• Set 5: Set 4 results AND state
LRC Reference Desk

lrcrefer@sandiego.edu
619.260.4612
Chat: http://www.sandiego.edu/law/library/