

Advanced Search

Legal Research Center Video Series



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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



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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

Cases

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)

Enter terms, citations, databases, questions, anything ...

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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 phrases
- Variations of terms you’ve entered may be automatically included (“defamed” □ “defamation”)

Why use terms & connectors?

Versus natural language searches:

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

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

Terms & connectors

How to specify a terms and connectors 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

Can also prepend *advanced:* or *adv:* to your search query

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

- noncompete clause, noncompete agreement, covenant not to compete
- driving under the influence, driving while intoxicated

Antonyms

- constitutional, unconstitutional
- buyer, seller

Related concepts

- alcohol, liquor, spirits, beer, wine, drugs, narcotics
- defamation, slander, libel

Terms

**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

Terms

**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

Terms

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”

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*

ATLEAST n (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
(from smallest to largest; /s = /25, /p = /75)
4. AND

Processing order: examples

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: examples

*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*

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