

Advanced Search

Legal Research Center Video Series



Melissa Abernathy

Learning Objectives

By the end of this video, students will be able to...

1. Describe the characteristics of connectors
2. Construct a terms & connectors search
3. Distinguish between a natural language and a terms and connectors search

1. Describe the characteristics of connectors

AND

AND

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

OR

OR

- Retrieves documents with any term
- Variations
 - liable OR liability
- Synonyms
 - car OR automobile OR vehicle
- Note: In a terms and connectors search on Westlaw a space is an implied OR connector, e.g.
 - e.g. car automobile vehicle is interpreted as
 - car OR automobile OR vehicle

Proximity

/n

- Within # of words where $n = \#$ of words
- e.g. oral /5 contract

/s

- Within the same sentence
- execution /s will

/p

- Within the same paragraph
- administration /p coach

Root expander

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 !

Universal character/wildcard

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
- Use cautiously
 - bl**d = blind, bland, blend

Quotation marks

Exact phrase: “”

- Useful for specific terms of art, Latin phrases, etc.
 - “double jeopardy” or “mens rea”
- Not useful for phrases that could be expressed multiple ways.
 - “blood alcohol level” could be expressed differently as the *level of alcohol in the defendant’s blood*.
- Enclosing a single word in quotes does nothing
 - “damage” still retrieves damages
 - Instead, use the # symbol, #damage to retrieve damage but not damages.

Exact Word

Exact word:

To search for a word exactly as you entered it, use the pound symbol (#).

- Enter #damage to retrieve *damage* but not *damages*.

Ensure relevance

When you do not want a term to appear

- 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)

Use 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

2. Construct a terms & connectors search (the “goldilocks” approach)

Example: Workplace Harassment

An employee alleges that their supervisor created a hostile work environment by making repeated sexual comments and inappropriate touching.

Too broad

harassment AND workplace

- This search will retrieve all kinds of harassment (not just sexual) and all workplace contexts, including bullying, discrimination, and non-sexual conduct.
- Likely to bring back thousands of irrelevant results.

Too narrow

"hostile work environment" AND "inappropriate touching" AND "repeated sexual comments" AND supervisor

- This search is too specific — it requires all of those exact phrases to appear in a case.
- Many relevant cases may use synonyms or only address some of these facts.

Just right

("sexual harassment" OR "hostile work environment") /p (supervisor OR manager) /p (touching OR comments OR remarks)

- Keeps intact legal phrases “sexual harassment” and “hostile work environment”
- Allows for synonyms supervisor/manager and touching/comments/remarks
- Ensures the terms appear in the same paragraph, suggesting they are discussed in the same context.

Keep in mind..

- Using proximity connectors alone is not the magic solution.

hostile /5 environment /10 gender AND plaintiff /3 promotion

- The search above uses the wrong combination of too specific keywords and too tightly connected proximity connectors.
- This search would be too narrow.

Example: Social Media Gone Wrong

An employee was terminated after posting critical comments about their employer on X (formerly Twitter).

Too broad

employment OR termination OR “social media”

- This search contains keywords for employment, termination, and social media but has connected them with OR connectors.
- This means this search will return any documents that contain any one of these words, with no relation to the others.
- Likely to bring back hundreds of thousands of irrelevant results.

Too narrow

“fired for tweeting negative comments about employer”

- Requires very specific language — excludes cases that discuss Facebook, Instagram, or use “social media” instead of “tweeting,” and excludes cases with slightly different phrasing.

Just right

(termination OR fired OR discharged) AND ("social media" OR Twitter OR Facebook OR Instagram) AND (comments OR posts OR statements) AND employer

- Covers various ways of saying “fired,” includes the major social media platforms explicitly while also covering the general term, and focuses on posts/statements directed at the employer.
- We *could* consider adding one or some proximity connectors instead of AND connectors, it would depend on the number of results achieved with this search.

The “goldilocks” approach

- **Too broad** → drowns students in irrelevant results, wasting time.
- **Too narrow** → misses many relevant cases, risks finding nothing.
- **Just right** → uses synonyms, connectors, and a balance of specificity & breadth to find a good set of relevant results.

Most importantly, adjust as many times as needed.

Goldilocks didn't get it right the first time either.

3. Distinguish between a natural language and a terms and connectors search

Natural Language

Natural language is the 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 (e.g. attractive nuisance)
- Variations of terms you’ve entered may be automatically included (defame = defamed, defamation, etc.)

Terms and Connectors

Terms and Connectors (sometimes referred to as Boolean searching) offers 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.

Search Strategy Face Off



When to use natural language

- When you're not sure what terms lawyers or courts use to describe the issue.
- When you want to get a quick sense of what kinds of cases or statutes are out there.
- When you're looking for secondary sources (articles, practice guides, etc.) where the language is more like ordinary English.

Strength: Easy to use, more forgiving of inexperience, good for exploratory research.

Weakness: Can retrieve a lot of irrelevant results, harder to control the scope of results

When to use terms and connectors

- When you know the legal concepts and vocabulary and want to control the breadth or depth of your search.
- When you're looking for primary law (cases, statutes) on a specific issue with precise relationships between terms.
- When you want to be sure your search is comprehensive and reproducible.

Strength: Strength: Precise, customizable, helps you avoid irrelevant results, lets you focus tightly on relevant documents.


Weakness: Requires skill and knowledge of legal terminology, too rigid if your terms or connectors are poorly chosen.

Which search am I running?

- Default is a natural language search so if you have constructed a terms and connectors search with errors, the algorithm may default to natural language.
- **Lexis:** if a search includes a connector such as AND or OR, it will automatically be run as a terms and connectors search.
- **Westlaw:** If a search includes a proximity connector, root expander, or wildcard, it will be run as a terms & connectors search. You can also adjust your Westlaw settings to run a terms and connectors search automatically for searches containing AND, OR, &, or quoted phrases, though this is not the default setting.
- In either platform you can also force a terms and connectors search by starting your search query with *advanced:* or *adv:*

Lexis with the assist!

Lexis will indicate clearly which type of search you are running on your results page

Results for: search warrant locked dorm room Natural Language     

- Lexis also highlights the concepts as it has parsed it. In this case, separating search warrant, locked, and dorm room.
- To convert this to a terms and connectors search simply click on the drop down carat.

Additional Resources

- CALI Introduction to Search Logic and Strategies
<https://www.cali.org/lesson/1121>
- Westlaw Guided Exercises:
<https://tinyurl.com/3u49pt9k>
- Lexis Teaching Toolkit Exercise
<https://tinyurl.com/3x8djvh3>

LRC Reference Desk

Email: lrcrefer@sandiego.edu

Phone: (619) 260-4612

Chat: sandiego.edu/law/library

Other videos in this series are available on [the LWR Research Trainings page](#) of the LRC's website.