

THOMSON REUTERS

WESTLAW™

SEARCHING WITH BOOLEAN TERMS AND CONNECTORS

On Westlaw, you can search for documents by either typing a Boolean Terms and Connectors query or typing a plain language query in the **Search** box at the top of the page. Westlaw recognizes whichever search format you use.

Searching with Terms and Connectors

When you type a query in the **Search** box at the top of the page, special rules govern which searches are processed as Boolean Terms and Connectors searches. A search is processed as a terms and connectors search if it includes a grammatical, numerical, or BUT NOT connector; a root expander, phrase in quotation marks, or universal character; or a field restriction.

On the other hand, a search is processed as a plain language search if it includes only AND or OR connectors, e.g., *fraudulent & contract*. To process it as a terms and connectors search, include a grammatical, numerical, or BUT NOT connector, e.g., *fraudulent +1 transfer & contract*; a root expander, phrase in quotation marks, or universal character; or a field restriction. Or, use the Advanced Search page. Click **Advanced** next to the **Search** box to access the Advanced Search page.

Using Terms and Connectors on Westlaw

The terms and connectors search method allows you to enter a query that consists of key terms from your issue and connectors specifying the relationship between those terms. For example, you can specify that your terms appear in the same sentence (*/s*) or the same paragraph (*/p*). Type your query in the **Search** box at the top of the home page, change the jurisdiction if necessary, and click **Search**.

Use the terms and connectors search method when you are searching for particular terms or when you want to retrieve all available documents containing your search terms.

The screenshot displays the Westlaw search interface. At the top, there is a search bar with the query "design! /s defect! /p manufactur! /s km*wt". To the right of the search bar, it says "All State & Federal" and "Advanced". Below the search bar, there are navigation tabs for "Browse" and "Favorites". The "Browse" tab is active, showing a grid of categories: Cases, Key Numbers, Trial Court Orders, Statutes & Court Rules, Regulations, Administrative Decisions & Guidance, Secondary Sources, Forms, Briefs, Trial Court Documents, Expert Materials, Jury Verdicts & Settlements, Proposed & Enacted Legislation, Proposed & Adopted Regulations, Public Records, Dockets, News, Business Law Center, Company Investigator, Sample Agreements, and Legislative History. The "Favorites" tab is also visible, showing a search bar and a list of favorites including "Department of Energy", "Statutes & Court Rules", and "United States Code Annotated (USCA)".

And and Or

When you run a plain language search using descriptive terms, WestSearch, the legal search engine in Westlaw, accounts for language variety and returns relevant documents even if you used different search terms. Because researchers use common connectors in plain language searches, using ampersands (&) and spaces (OR) without connectors or fields are considered part of a descriptive terms search.

To run a terms and connectors search using these connectors, you can use Advanced Search if you want to use the AND or OR connectors without other connectors, expanders, or document fields. Or, look for WestSearch's suggestion to modify your results to documents that include your exact phrase or connectors after running your initial search.

AND (&)

To search for two or more terms that must appear anywhere in the document use *and (&)*. For example, type *narcotics & warrant* to retrieve results that include both terms in the same document. Keep in mind that when you use the & connector, terms may appear on different pages.

OR (OR)

To search for alternative terms, use the *or* connector, which is represented by a space. For example, type *attorney lawyer counsel* to retrieve documents that contain at least one of these terms.

Note: Use the Advanced Search page if you want to use an AND connector (&) or an OR connector (represented by a space) in Westlaw without other connectors or fields.

Choosing Search Terms

To run a terms and connectors search, choose terms significant to your issue. Consider the various forms the search terms might take. For example, when you search the term *liable*, you may also want to search for *liability*. If you do not search for all variations in a terms and connectors search, you may miss relevant documents.

ROOT EXPANDER (!)

To search for words with multiple endings, use the root expander (!) at the end of the root of the word. For example, type *object!* to retrieve *object*, *objected*, *objection*, and *objecting*.

UNIVERSAL CHARACTER (*)

To search words with variable characters, use the universal character (*). For example, type *withdr*w* to retrieve *withdraw* and *withdrew*.

SEARCH EXACTLY AS TYPED (#)

To search for a word exactly as you typed it, use the pound symbol (#) at the beginning of the word. For example, type *#damage* to retrieve *damage* but not *damages*. The pound symbol will turn off plurals and equivalents.

PHRASE ("")

To search for a phrase, use quotation marks (") around the phrase. For example, type *"res ipsa loquitur"* to retrieve the terms as a phrase.

Choosing Connectors

In addition to choosing terms for your query, you must also choose proximity connectors to specify the relationships between your search terms.

GRAMMATICAL CONNECTORS

- /p** the search terms must appear in the same paragraph (*hearsay /p utterance*)
- +p** the first search term must precede the second term in the same paragraph (*exception +p non-liability*)
- /s** the search terms must appear in the same sentence (*design /s defect*)
- +s** the first search term must precede the second term in the same sentence (*attorney +s fee*)

NUMERICAL CONNECTORS

- /n** the search terms must appear within *n* terms of each other, where *n* is a number from 1 to 255 (*personal /3 jurisdiction*)
- +n** the first search term must precede the second term by *n* terms, where *n* is a number from 1 to 255 (*capital +3 gain*)

BUT NOT CONNECTOR (%)

You can exclude documents that contain certain terms by using the BUT NOT connector (%) at the very end of your search. Westlaw excludes everything that follows the BUT NOT connector in your search. For example, the query *tax taxation /s income % investment* retrieves any document that contains the terms *tax* or *taxation* in the same sentence as *income*, but excludes documents where *investment* appears.

Note: A list of connectors and expanders is available on the Advanced Search page.

ORDER OF BOOLEAN TERMS AND CONNECTORS PROCESSING

Westlaw processes the connectors in your query in the following order:

" ", space (OR), +n, /n, +s, /s, +p, /p, &, %

The order in which connectors are processed affects what a query will retrieve. For example, suppose you want to retrieve cases containing the term *frisk* or the phrase *search and seizure*. The query *frisk! search! /3 seiz!* will not retrieve all of the desired documents because the OR relationship between *frisk!* and *search!* is processed first. This query requires that either *frisk!* or *search!* appear within three terms of *seiz!*; in other words, this query instructs Westlaw to search for these two alternative sets: documents with *frisk! /3 seiz!* or documents with *search! /3 seiz!*. To search for *search! /3 seiz!* first, change the order in which the connectors are processed.

USING PARENTHESES IN BOOLEAN TERMS AND CONNECTORS PROCESSING

You can use parentheses to change the order in which Westlaw processes the connectors in your query. When you place terms and connectors within parenthesis, those connectors are processed first. For example, when parentheses are used in the query *frisk! (search! /3 seiz!), search /3 seiz!* is processed first. This query instructs Westlaw to search for these two alternative sets: documents with *frisk!* or documents with *search! /3 seiz!*.

Changing the order of processing is also useful when searching for two citations as alternatives. For example if you are searching for cases that cite either *15 U.S.C.A.* or *42 U.S.C.A. § 1985*, you can type the query *(15 +5 1311) (42 +5 1985)*.

Using Field Restrictions

Documents on Westlaw are composed of several parts called fields. For example, in case law documents, the names of the parties, the name of the judge, and the names of the attorneys are each contained in a separate field. Other fields contain exclusive West editorial enhancements, such as the synopsis field, which contains the summary of a case, and the digest field, which contains the head- notes in a case. Rather than searching entire documents, you can use these fields to search for terms in specific parts of a document.

Note: Fields are content sensitive and vary by type of content (e.g., fields in cases differ from fields in statutes). Content-specific, commonly used fields are listed on the Advanced Search page.

Using the Advanced Search Page

To search content using the Advanced Search page, complete these steps:

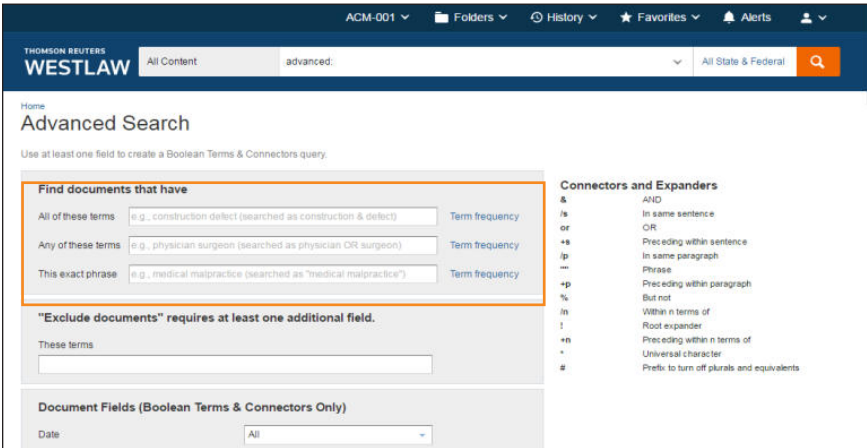
- 1. Click Advanced next to Search at the top of any page.
2. At the Advanced Search page, type your terms in the appropriate text boxes.
3. Click the arrow under jurisdiction if you want to change the jurisdiction.
4. Click Search.

While viewing the search result, you can edit your query in the Search box at the top of the page or by clicking Advanced again.

USING THE FIND DOCUMENTS THAT HAVE SECTION

You can use the text boxes at the top of the page under Find documents that have to do any of the following:

- If you want all of the terms included in your retrieved documents, type them in the All of these terms text box. For example, type narcotics warrant to retrieve documents that contain both terms.
• If you want any of the terms included in your retrieved documents, type them in the Any of these terms text box. For example, type attorney lawyer counsel to retrieve documents that contain at least one of these terms.
• If you want an exact phrase included in your retrieved documents, type it in the This exact phrase text box. For example, type res ipsa loquitur to retrieve documents that contain the phrase res ipsa loquitur.



USING THE EXCLUDE DOCUMENTS THAT HAVE SECTION

If you want to exclude documents that contain certain terms, type the terms in the *These terms* text box.

USING THE DOCUMENT FIELDS SECTION

The Advanced Search page enables you to easily restrict your search to specific document fields. The fields displayed at an Advanced Search page vary by content category. For example, if you click **Advanced** at the home page, the Advanced Search page displays a date, citation, and name/title field. If you click **Advanced** at the Cases page, the Advanced Search: Cases page displays fields such as party name, synopsis, digest, judge, and attorney. If you click **Advanced** at the Statutes and Court Rules page, the Advanced Search: Statutes and Court Rules page displays fields such as caption, statutory text, and annotations.

You can use multiple fields in a search.

<p>Document Fields (Boolean Terms & Connectors Only)</p> <p>Date <input type="text" value="All"/></p> <p>Party Name <input type="text"/></p> <p>Citation <input type="text"/></p> <p>Synopsis <input type="text"/></p> <p>Digest <input type="text"/></p> <p>Synopsis/Digest <input type="text"/></p> <p>Judge <input type="text"/></p> <p>Attorney <input type="text"/></p> <p>Court Name/Prelim <input type="text"/></p> <p>Docket Number <input type="text"/></p>	<p>Connectors and Expanders</p> <p>& AND</p> <p>/s In same sentence</p> <p>or OR</p> <p>+s Preceding within sentence</p> <p>/p In same paragraph</p> <p>~ Phrase</p> <p>+p Preceding within paragraph</p> <p>% But not</p> <p>/n Within n terms of</p> <p>! Root expander</p> <p>+n Preceding within n terms of</p> <p>* Universal character</p> <p># Prefix to turn off plurals and equivalents</p>
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Viewing a Search Result

After you run your terms and connectors search, the result page is displayed. If an overview of your search is displayed, click a content category in the left column, e.g., **Cases**, to display the result page for that content category. By default, documents are ranked by relevance. To change the default ranking, choose an option, e.g., **Date**, from the **Sort by** drop-down list at the top of the center column. A link to additional relevant documents may be displayed at the top of the result list. Click the link to view the additional documents, then click **Return to list** to return to your search result.

NARROWING A SEARCH RESULT

You can narrow your search result by typing terms in the **Search within results** text box under **NARROW** in the left column and clicking **Search**. You can use any connectors, including the **AND** or **OR** connectors.

The screenshot displays the Westlaw interface with the following elements:

- Top Navigation:** Includes 'ACM-001', 'Folders', 'History', 'Favorites', 'Alerts', and a user profile icon.
- Search Bar:** Shows the search terms 'advanced: tax taxation /s income % investment' and the selected circuit '9th Circuit'.
- Left Column (VIEW):** A list of content categories with counts, such as 'Cases (10,000)', 'Statutes (2,548)', and 'Regulations (5,133)'. A 'NARROW' section at the bottom includes a 'Search within results' text box.
- Center Column:** Displays search results for 'Cases (10,000)'. The 'Sort by' dropdown is set to 'Relevance'. Two results are visible:
 - 1. Karmun v. C.I.R.**: United States Court of Appeals, Ninth Circuit. December 12, 1984. 749 F.2d 567. 55 A.F.T.R.2d 85-480. 84-7308. The summary discusses income tax deficiencies and exemptions for Alaskan natives.
 - 2. Welch v. Henry**: Supreme Court of the United States. November 21, 1938. 305 U.S. 134. 59 S.Ct. 121. 13. The summary discusses an appeal from the State of Wisconsin regarding income tax.
- Right Column (RELATED DOCUMENTS):** Lists secondary sources and related documents, such as '3122. Compensation for covenant not to engage in competing business' and '3126. Discount of indebtedness or liability'.

LOOKING FOR MORE INFORMATION?

Westlaw is available on the Web at westlaw.com.

For assistance using Westlaw, call 1-800-WESTLAW (1-800-937-8529).

For free reference materials, visit legalsolutions.com/westlaw-support.

