

WESTLAW EDGE

How to search with Boolean Terms and Connectors

On Thomson Reuters Westlaw Edge™, you can search for documents by either typing a Boolean Terms and Connectors query or typing a plain language query in the search bar at the top of any page. Westlaw Edge recognizes whichever search format you use.

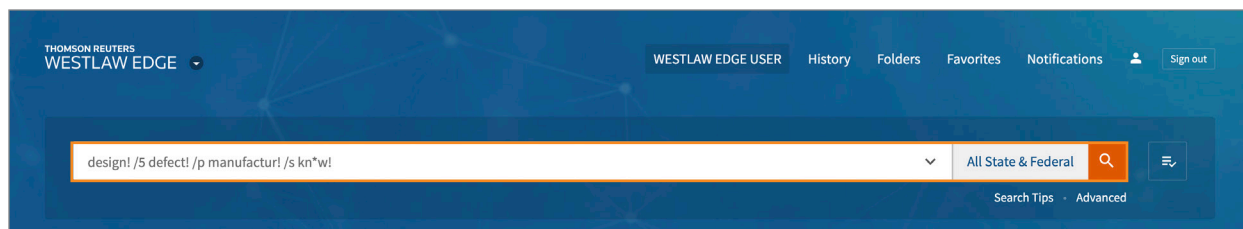
Searching with Terms and Connectors

When you type a query in the **search** bar 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.

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, a root expander, phrase in quotation marks, or universal character; or a field restriction, e.g., *fraudulent +1 transfer & contract*. Or, use the Advanced Search page. Click **Advanced** next to the search bar to access the Advanced Search page.

Using Terms and Connectors on Westlaw Edge

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 bar at the top of the home page, change the jurisdiction if necessary, and hit Enter or click **Search**.



'And' and 'Or'

When you run a plain language search using descriptive terms, WestSearch® Plus, the legal search engine in Westlaw Edge, 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.

Use **Advanced Search** to run a terms and connectors search using these connectors, AND or OR, without other connectors, expanders, or document fields. Or, if you run a plain language search, using WestSearch Plus, you may use the **Search Within** filter in your results to narrow your results to those documents with a specific term or phrase. The Search Within filter defaults to terms and connectors.

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.

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.

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 (" "). 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 Edge 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.

ORDER OF BOOLEAN TERMS AND CONNECTORS PROCESSING

Westlaw Edge 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 Edge 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 Edge 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 Edge 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 Edge 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 editorial enhancements, such as the synopsis field, which contains the summary of a case, and the digest field, which contains the headnotes in a case. Rather than searching entire documents, use these fields to search for terms in specific parts of a document.

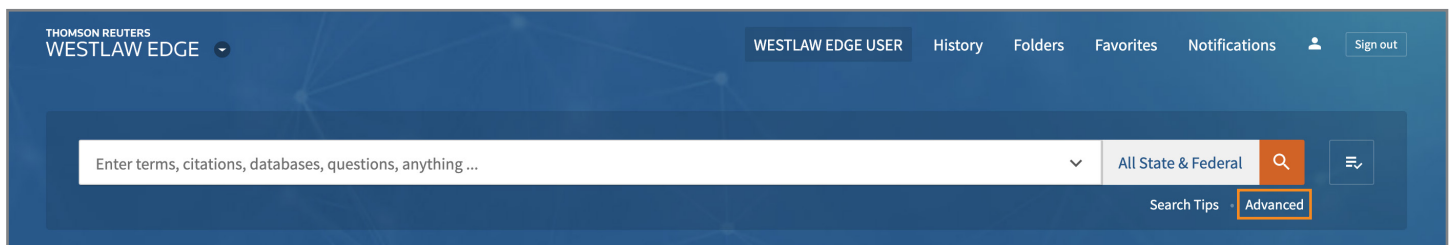
NOTE: Fields are content sensitive and vary by type of content (e.g., fields in cases differ from fields in statutes). Content-specific, commonly used fields are listed on the Advanced Search page.

Using the Advanced Search Page

You may want to use the **Fields** on the Advanced Search page to search for cases with a specific legal issue in the Headnotes, before a particular judge, and within a particular date range. To search content using the Advanced Search page, complete these steps:

1. Click **Advanced** below the search bar 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. Imagine you need to locate cases that interpret or define the phrase *due diligence*. If you searched cases for the phrase “due diligence,” you’d retrieve thousands of documents that use the legal phrase, but don’t define what it means in that jurisdiction. If you enter *due diligence* in the Words & Phrases field on the Advanced Search page, you’ll retrieve only those cases that interpret or define the phrase. A more relevant result that gets you to your answer faster.



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*.
- If you want to exclude documents that contain certain terms, type the terms in the **These terms** text box under the "Exclude documents" section.

USING THE DOCUMENTS FIELD 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.

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