



## Boolean Magic

Tailor your search through these Boolean operators.

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Most research applications, including Lexis, Westlaw, Checkpoint and the Web, are constructed based on Boolean search methodology. Creating an effective Boolean search will reduce research time and will return the most on-point results. Below are several strategies for tailoring your search strings and using Boolean search operators.

### What is a Boolean Search Operator?

The term “Boolean” refers to a deductive logical system, such as Boolean algebra, which is used to symbolically represent the relationships between sets, classes and other entities. A “Boolean search” is a query using the Boolean operators “and,” “or” and “not” and parentheses to construct a complex condition from simpler criteria. In LexisNexis, the Boolean search method is also known as the “terms and connectors” method of searching.

When you begin your research, your initial search string should be as specific as possible to yield the fewest possible hits. If you have tailored your search criteria properly, only the most on-point materials should result. If your very specific search string returns no hits, reduce the specificity until you get results.

One of the best ways to tailor your search terms to retrieve the most helpful source material is by using the proper combination of Boolean search operators. Boolean searches allow you to combine words and phrases using Boolean operators to limit, widen or define your search. Most Internet search engines and Web directories default to Boolean search parameters, but a good researcher should know how to use basic Boolean operators.

### Basic Boolean Search Operators

The most basic Boolean search operators are “and,” “or,” “not” and parentheses.

**And.** Connecting search terms with “and” or an ampersand (&) allows the searcher to find documents containing all of the speci-

fied words or phrases. Most legal or Web-based search engines will substitute “and” for a space. In other words, the use of a string of words will return search results that include all of the words included in the string.

**Or.** Using the word “or” in your search string will generate documents containing at least one of the specified words or phrases but not necessarily both. The “|” will also operate as an “or”.

**Not.** Using the word “not” or a dash (“-”) before a search term indicates that the searcher does not want to include the term(s) following “not” or “-.” For example, the search “New York City” & Manhattan will return millions of hits, including the website [www.nyc.gov](http://www.nyc.gov). However, if you use the search string “New York City” & Manhattan -gov, this website will not be included in the search results.

**Quotation marks.** The use of quotations yields documents that contain an exact phrase. For example, if you run a search with the terms “settlement gross income physical injury,” your search will return 1,315 total results in the Pension & Benefits database of Checkpoint. However, if you use quotes appropriately (settlement “gross income” “physical injury”), you can narrow your returned documents to 758. That is still a lot of documents, but many less than a search without using the quotations.

### Ten Advanced Boolean Operators

In addition to the search operators discussed above, consider using the following Boolean operators to construct an advanced query and streamline your research process. Note that some research applications may recognize these operators and some may not; however, they are generally recognized by Lexis, Westlaw, Checkpoint and the Web.

**1. Exclude.** Use the “^” (in Checkpoint), “-” (in Web searches) or “and not” (in Lexis) to exclude the word following it. For example, “change in control” ^ “excise tax” will return documents that include the phrase “change in control” but do not include the phrase “excise tax.”

**2. Keyword Variations.** Use an asterisk (\*) or exclamation mark (!) when you want your search to return all variations of a word. For example, to return a search using all variations of the word “deduction,” such as “deduct,” “deducted” or “deduction,” use “deduct!” or “deduct\*”.

**3. Single Character Variations.** Where there is a variation in a single character in a word, use “?”. For example, if you are searching for cases with a specific person’s name but you are unsure of its spelling, insert the “?” in place of the questionable letter. In other words, for “Meredit” or “Meredit,” use “mered?th” in your search.

**4. Within a Certain Number of Words of.** Use the operator “/#” to search words or phrases that are within a certain number (however many words you specify) of each other. For example, “change in control” /8 “excise tax” will return documents that have the term “change in control” within eight words of the term “excise tax.” This operator can be particularly helpful in narrowing your search in instances where specific terms or phrases are always used within close proximity of each other.

**5. Within the Same Sentence.** The use of “/s” will find documents containing your search terms within the same sentence. Sometimes two terms can be used within a document but are only helpful if they are used in the same sentence. For example, if you want to know whether settlement payments are taxable and

included in gross income, it may not be helpful to review documents that use the word “settlement” in the beginning of the document and the term “gross income” at the bottom of the document. Such documents may be returned in response to your inquiry but may not be on point or helpful. However, if you use “settlement” /s “gross income,” you will increase the likelihood of finding helpful documents.

**6. Within the Same Paragraph.** The operator “/p” will find documents containing your terms within the same paragraph. The “/p” works much like the “within the same sentence” operator; the search will yield documents containing the identified search terms within the same paragraph.

**7. Precedes by a Certain Number of Words.** The use of “pre/#” will return documents that contain the search terms in the proper order within the specified number of words. For example, “change in control” pre/7 “excise tax” will yield documents in which the terms “change in control” precede “excise tax” within seven words.

**8. Precedes in the Sentence.** Using “pre/s” will return documents that contain the identified terms in the proper order within the same sentence. This operator is particularly helpful in circumstances where one term always precedes another term in a sentence. For example, if you want to return documents that contain the term “attorney” before the term “fee,” you could use “attorney pre/s fee”. Or, if you are searching for a specific case, you could use “pre/s” with the names of the plaintiff and defendant.

**9. Precedes in the Paragraph.** Use “pre/p” to find documents that contain your search terms in the proper order within the same paragraph.

**10. At Least.** Use “atleast#” to specify how many times a term must be contained within a document. For example, “atleast7(“expert witness”)” will only return documents that mention “expert witness” at least seven times.

### Internet-Specific Operators

The following advanced Boolean operators are best employed when performing research on the Internet.

**Tilda.** Use the tilda (~) to find synonyms or related words. For example, if you want to search for documents that include words related to “negotiation” you could search “~negotiation”.

**Inurl:Text.** Use “inurl” to return Web pages with a specific phrase or word in the URL. For example, “inurl:litigation” will return websites with the phrase “litigation” in the URL.

**.doc, .pdf, .xls or .pptx.** Would you like to find an outline, article, spreadsheet or PowerPoint presentation? These operators will find pages that contain a specific type of file. Use “.doc” to locate a Word document or “.pdf” for a .pdf file. To find a calculator in an Excel spreadsheet, try a search term using “.xls”. To locate a PowerPoint slide deck, use “.ppt” or “.pptx” in your search string.

### Boolean Strategy

You should always shoot for the moon in your initial query, being as specific as possible and utilizing as many search operators as possible. Think of what your ideal document would say, and use that to craft your initial search query. When the most specific search string you can create results in no documents, pull back and gradually get more general. Remove the “pre/s” or “/s” operator and try the “pre/p” or “/p” instead. If that doesn’t work, keep adjusting your search until it returns something useful. By employing as many Boolean tricks as you can, you’ll cut down your research time while achieving better research results. □

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