HARVARD LAW SCHOOL LIBRARY

LEXISNEXIS & WESTLAW TUTORIAL

LexisNexis & Westlaw provide access to U.S. federal and state primary and secondary law sources as well as sources of international law and the laws of a growing number of other jurisdictions. Sources vary by jurisdiction, but may include constitutions, legislation, legislative history, statutory codes, regulations, regulatory materials, cases, case digests, citators, public records, law reviews, treatises, and legal and general news. Detailed, current information on databases offered by LexisNexis & Westlaw is available at:

- LexisNexis database directory: http://web.nexis.com/sources/
- Westlaw database directory: http://directory.westlaw.com

The *LexisNexis Directory of Online Services* and the *Westlaw Database Directory* are available in print at the Langdell Reference Desk. Please note: many but not all LexisNexis & Westlaw databases are available under our academic accounts.

About this tutorial

What follows are a few tasks to help you get started using LexisNexis & Westlaw for legal research. As you use each service, take a few minutes to familiarize yourself with the information and options presented on the screen.

What to do if you would like additional instruction

Help is available. Feel free to contact the Langdell reference desk, 617-495-4516, langref@law.harvard.edu, located just off the reading room on the fourth floor of Langdell Hall with any questions. You may also phone LexisNexis & Westlaw support:

- LexisNexis: 1-800-455-3947
- Westlaw: 1-800-850-9378

The library sponsors LexisNexis & Westlaw training classes throughout the academic year for students who would like hands-on instruction. All classes are held in the Langdell Computer Classroom (L233) located on two north. Training schedules and sign-ups are available at the LexisNexis and Westlaw home pages. (See *Skill 1* below.)

LexisNexis and Westlaw documentation and reference materials are available in *pdf* format at the LexisNexis and Westlaw home pages and in print in the Langdell Computer Classroom.

Your LexisNexis & Westlaw accounts

LexisNexis and Westlaw accounts are distributed to new students in their registration packets. Please stop by the Langdell reference desk if you did not receive or have misplaced your accounts. LexisNexis and Westlaw require you to register your new accounts with them. When you register you will have the opportunity to create a custom ID or username and a custom password. LexisNexis requires you to then use these in order to access their services. With Westlaw, they are optional. See the instructions provided on your LexisNexis and Westlaw account cards.

Skill 1 Sign on to LexisNexis & Westlaw

Let's begin by exploring the LexisNexis & Westlaw interfaces. We will start by signing on to the LexisNexis & Westlaw home pages. We will then explore each service's research system including interface options and other settings available for controlling your online experience.

In each of the following tasks, we have grouped instructions for both services together. You may prefer, however, to explore one service first and then the other. As with many products competing in the same market, LexisNexis & Westlaw have become extremely similar. A service, tool or command in one will often have an exact parallel in the other.

Task 1a1 Sign on to the LexisNexis home page

1. Sign on to the LexisNexis home page: http://lawschool.lexisnexis.com
2. Enter the Custom ID and Password you created when you registered your account. Click the *Register your Activation Code* link if you have not already registered. If you are using your own computer and would like to store your ID and password, click the *Remember My Sign On Information* checkbox. Next, hit enter or click the sign on icon. *Congratulations!* You are now signed on to LexisNexis.
3. The LexisNexis home page offers a number of useful tools, materials and services including tools for common research tasks, reference literature, tutorials, study aids, outlines, training schedules with online sign ups, and help.
4. Notice the *Learning LexisNexis*, *Study Aids* and *Help for Students* links near the upper left of the screen. Click the *Learning LexisNexis* link. Notice the six boxes in the center portion of the screen. Click the *More…* links in the *Reference Literature* and *Tutorials & Tours* for full listings of what's available in those boxes. Next, click the *Study Aids* link and notice the various materials available including *Area of Law Outlines*. Next, click the *Help for Students* link and notice the various types of help available including the very popular *Live Research Help*.
5. Notice the row of six tabs near the top left of the screen starting with the red *Law School Home* tab. Click the fifth tab labeled *My School*. Notice the information presented including (near the bottom of the page) a training schedule. LexisNexis offers introductory, refresher and advanced training sessions throughout the academic year. Feel free to sign up for a class. All classes are held in the Langdell Computer Classroom (L233) located on two north.

Task 1a2 The LexisNexis research system

6. Click the *Law School Home* tab. A few, very useful research tools are presented on the LexisNexis home page including *Get* by citation and by party name, *Look* for a Search Advisor topic and *Search* a small group of commonly used sources. However, let's begin our research training using the *LexisNexis Total Research System* by clicking the *Research System* tab.
7. The LexisNexis screen is now split into three parts: top, middle and bottom. (The bottom frame is not yet visible.) The top part contains a new additional toolbar, labeled *LexisNexis Total Research System*, with links to various services, tools and commands. (See *Illustration 1* below.) The middle part is where LexisNexis presents search templates, search results, documents and other information. The bottom part contains navigational tools and is only visible when search results or documents are presented.

Illustration 1 The LexisNexis Total Research System Toolbar
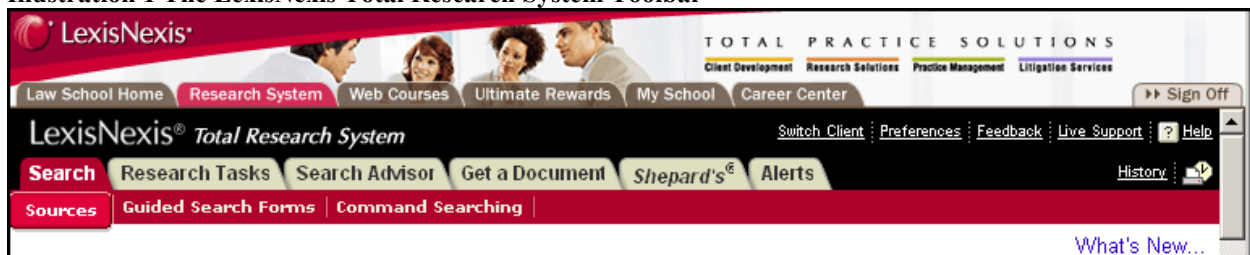
8. Notice the row of six new tabs: *Search*, *Research Tasks*, *Search Advisor*, *Get a Document*, S*hepard's* and *Alerts*. Click the *Research Tasks* tab. *Research Tasks* are pre-packaged collections of databases and

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services useful for research in a particular topic or jurisdiction. Feel free to select one and make it your default. Next, click the *Search Advisor* tab. *Search Advisor* is organized around broad legal topics and is designed to help you get started with your research. Click the *Alerts* tab. *Alerts* allows you save a search and the run it on an automated schedule. In the next few tasks, we will take a quick look at the remaining three tabs *Search*, *Get a Document*, and *Shepard's*.

9   Notice the set of tools at the upper right of the toolbar: *Switch Client*, *Preferences*, *Feedback*, *Live Support*, *Help*, *History* and *Sign Off*. Let's change a few of your default settings. Click the *Preferences* link. Next, under the *General* options tab, select either *Search* or *Research Tasks* as your *Start Location*, change the number of documents to *retrieve* at a time to 50 and be sure all three *Results View* check boxes are checked.

10 Suppose you need help with the various *Preferences* settings. *Live Support* initiates a chat session between you and LexisNexis customer support. Click the *Help* link. LexisNexis *Help* is context-sensitive. Even more detailed *Tips* are often available. Close *Help* and click the *Tips* icon (⬚) located in the upper-right corner of the *Preferences* box. Feel free to experiment with other settings. Click *Set* to save your *Preferences*.

Task 1b1 Sign on to the Westlaw home page

1   Sign on to the Westlaw home page: http://lawschool.westlaw.com

2   Enter the Username and Password you created when you registered your account. Or enter your Westlaw password. Click the *Register password now!* link if you have not already registered. If you are using your own computer and would like to store your username and password, click the *Remember me* checkbox. Next, hit enter or click the *Go* icon. *Congratulations!* You are now signed on to Westlaw.

3   The Westlaw home page offers a number of useful tools, materials and services including reference literature, tutorials, study aids, outlines, training schedules with online sign ups, and help.

4   Notice the four buttons in the gold bar near the top of the screen: *Survival Guide*, *Westlaw Training, Job Postings*, and *Advanced Westlaw Features*. Click the *Westlaw Training* button. Notice the three columns: *At My School*, *Certification & Seminar*, and *Basic Westlaw Tutorials*. In the *At My School* column, click the *In-person Westlaw training courses…* link. Notice the Training List. Westlaw offers introductory, refresher, and advanced classes throughout the academic year. Feel free to sign up for a class. All classes are held in the Langdell Computer Classroom (L233) located on two north.

5   In the *More Resources…*pull-down menu in the *Basic Westlaw Tutorials column*, select *Free Westlaw user guides*. Most of the guides are available for download in pdf format.

Task 1b2 The Westlaw research system

6   Click the *Home* button in the upper left corner of the screen. A few *Quick Research* tools are presented on the Westlaw home page including *Find*, *KeyCite* and *Brief It!*. However, let's begin our research training by clicking the gray *Research now on Westlaw* button in the left column and entering the *Westlaw Research System*. Unlike a LexisNexis session, Westlaw will time-out. When this happens, you will be presented with the sign on screen. Simply sign back on. You should be returned to where you left off.

7   The Westlaw screen is split into three frames: top, left, and right. The top frame contains a permanent toolbar with links to various services, tools and commands. (See Illustration 2 below.) The left frame provides context-sensitive information about the materials being presented in the right frame. The right frame is where Westlaw presents search templates, search results, documents and other information. (Westlaw provides a full-screen command to make cite lists and documents contained in the left and right frames easier to read.)

Illustration 2 The Westlaw Research System Toolbar

8   Notice the four tabs at the left of the top frame: *Law School*, *Westlaw*, *Business & News* and *Massachusetts*. Westlaw Tabs provide pre-packaged, customizable collections of databases and services useful for research in a particular topic or jurisdiction. *Law School* is the default tab. Click the *Add/Remove Tabs* link to the

right of your tabs. Notice the wide variety of available tabs. You may select up to six tabs. Make your selections and click *Next*. Select a default tab and then click *Save*.

9   In the Law School tab, notice the tools for beginning a research session presented in the left frame: *Find by citation*, *KeyCite this citation*, and *Search these databases*. In the next few tasks, we will take a quick look at each of these tools.

10 Notice the five tools in the upper-right of the top frame: *Preferences*, *Alert Center*, *Research Trail*, *Help* and *Sign Off*. Notice the six tools and services located at the very top of the screen: *Find & Print*, *KeyCite*, *Directory*, *KeySearch*, *Court Docs*, and the *Site Map*.

11 Let's change a few default settings. Click the *Preferences* link. Set your Time zone to Eastern and click *Save*. Next, click the *Document Display* link on the left, turn on the automatic display of images and click *Save*. Next, click the *Result List Display* link, change the number of documents displayed at a time to 50 and click *Save*. Next, click the *Print & Download* link and set your default destination to E-Mail and click the *Properties* button. Enter your email address and select an appropriate file format. Composed/Book-Style is best for reading and printing and Full-width is best for word-processing. (Most files emailed and downloaded from Westlaw contain live embedded links to the cases, statutes, regulations, law review articles, and other materials cited in the document.) Click *Save* twice.

12 Suppose you need help with the various *Preferences* settings. Click the *Help* link in the upper-right of the top frame. You should now see a *Help Center* frame at the right of the screen. Notice the *Live Help* template. *Live Help* initiates a chat session between you and Westlaw customer support. Click the *Exit* button to close the *Help Center*. For more context-sensitive help, click the *Preferences Tips* link at the bottom of the left frame.

Congratulations! You are now already extremely familiar with many of the LexisNexis & Westlaw services, tools, commands and features and are ready to begin using them in your legal research.

Skill 2 Locate a case by citation and update it

LexisNexis & Westlaw allow you to retrieve a document using its citation. With LexisNexis, use the *Get a Document* service to retrieve cases, statutes, law review articles, and other materials; with Westlaw, use the *Find* service. On LexisNexis, use the *Shepard's* citator to update and validate an authority; on Westlaw, use *KeyCite*.

Task 2a Use the LexisNexis *Get a Document* service to retrieve 54 F.3d 1262

1   Click the *Get a Document* tab. Next, click the red *Citation* button (it should already be selected). Notice the additional buttons for *Party Name* and *Docket Number*. What *Tips* are available?

2   Enter 54 f3d 1262 in the *Get by Citation* box and click *Get*. *Bluebook* citation format will work for most documents. Use the *Citation Formats* link if you are unsure of the correct format.

3   You should now be viewing the case. Notice the new toolbars at the top and bottom of the screen. The top toolbar contains several useful tools and services including: *Focus*, *More Like This*, *More Like Selected Text*, *Shepardize*, *TOA* (Table of Authorities), *Copy w/ Cite*, *Fast Print*, *Print*, *Download*, *Fax*, *Email* and *Text Only*. The bottom toolbar provides four document navigation tools: *Explore*, *Page*, *Doc* and *Term*.

4   Browse 54 F.3d 1262 using the scroll bar on the right. What is the name of the case? What date was it decided and by what court? Notice the LexisNexis editorial enhancements including the Case Summary and Headnotes.

5   Notice the 9 headnotes created by LexisNexis editors to describe points of law contained in the opinion. Headnote 6 describes a point of Illinois law on enjoining the inevitable disclosure of trade secrets. Click the (⬇) icon to go to that portion of the opinion described by the headnote and click the (⬆) icon to return to the list of headnotes.

6   The headnotes are part of a case digest system that allows you to locate additional cases on the same point of law. Headnote 6 is assigned two digest topics. Click the *Retrieve All Headnotes* icon (📑) to the right of each topic to retrieve all cases with headnotes classified under that topic. Click the *More Like This Headnote* link to retrieve additional cases on the same point of law but not necessarily classified under this headnote. Click the *Shepardize: Restrict By Headnote* link to locate cases citing to PepsiCo on the same point of law discussed in the headnote.

7   Return to the top of the case. Notice the yellow triangle (⚠) to the left of the case name. This is a *Shepard's* signal warning of potential negative treatment by a later court. Click the yellow triangle to

Shepardize the PepsiCo case. The Shepard's service generates a list of later cases, law review articles, and other materials that have cited to a case. Shepard's helps you determine the prior and subsequent direct and indirect history of a case. Shepard's is an extremely valuable tool for updating and validating your research. Use your browser's back button to return to the Pepsico opinion.

8   LexisNexis organizes documents into segments. Use the Explore tool at the left of the bottom toolbar to go to the *opinionby* segment of the case. Who authored the opinion?

9   Suppose you were looking for a point of law contained on page 1269 of the opinion. Use the Page tool at the middle of the bottom toolbar to go to page 1269. First select the appropriate reporter (F.3d), enter 1269 in the box (kind of tricky) and click *Go*.

10 Suppose you wanted to find a specific term (*isotonic*) in the text of the opinion. Enter the term *isotonic* in the *FOCUS Terms* box in the top toolbar and click *Go*. Use the *Term* tool at the right of the bottom toolbar to go directly to the term *isotonic*. It should be highlighted in yellow.

11 Suppose you wanted to copy a portion of the opinion with its citation and paste it into your own document. Highlight the desired portion of text and click the *Copy w/ Cite* link located in the top toolbar. Check the *Copy reference as hyperlink* box to create a link to the copied text.

Task 2b Use the Westlaw *Find & Print* service to retrieve 54 F.3d 1262

1   Click the *Find & Print* link in the top frame to enter the Westlaw *Find & Print* service. Find is available for many types of legal documents. Westlaw offers help in the form of very useful templates when it has trouble interpreting your citation format. Click the *Find Tips* link in the left frame. Note the extremely useful tips. Close the Find Tips window.

2   Enter 54 f3d 1262 in the citation box in the left frame and click on *Go*. (You could have also used the *Find by citation* box we looked at earlier.)

3   You should now be viewing the case. Notice the new left and right frames. Click the Full Screen icon (▶) located in the upper right to view the case in full screen; click the Split Screen icon (◀) to return to split screen view. Notice the two new context-sensitive tabs in the left frame: *Result List* and *Links for*. The *Links for* tab contains many useful features including links to *Locate in Result*, *KeyCite Full History, KeyCite Direct History (Graphical View), KeyCite Citing References*, *Case Outline*, *Results Plus* documents, *Table of Authorities*, and *West Key Numbers*. Notice the very hard to find *Tools* menu at the extreme bottom right of the screen.

4   Browse 54 F.3d 1262 using the scroll bar on the right. Click the *West Reporter Image* link or icon to retrieve a scanned image of the case in PDF format. What is the name of the case? What date was it decided and by what court? Notice the Westlaw editorial enhancements including the case synopsis and West Headnotes.

5   Notice the 12 headnotes created by the West editors. Headnote 7 describes a point of Illinois law on enjoining the inevitable disclosure of trade secrets. Click the ([7]) link to go to that portion of the opinion described by the headnote; click the ([7]) link in the text to return to the list of headnotes.

6   The headnotes form the famously elaborate West digest system of topics and key numbers that organize case law by subject. Clicking the (212k138.33) topic and key number link would retrieve all cases classified under this topic and key number ordered by most recent cases first. Clicking the *Most Cited Cases* link would retrieve the same list but ordered by most cited cases first. Clicking the KeyCite Notes icon ( ) would locate cases and other materials that have cited to PepsiCo for the point of law contained in this headnote.

7   Notice the yellow flag ( ) to the left of the case name. This is a *KeyCite* signal warning of potential negative treatment by a later court. Click the yellow flag to get the full history of PepsiCo including its subsequent and prior history as well as its negative indirect history. (You can also click the *Full History* link in the left frame.) *Direct History Graphical View* is extremely useful for cases with complex procedural histories. Use the *Citing References* link to generate a list of later cases, law review articles and other materials that have cited to PepsiCo. KeyCite is an extremely valuable tool for updating and validating your research.

8   Westlaw organizes documents into fields. Use the Case Outline link in the left frame to go to the opinion field. Who wrote the opinion?

9   Suppose you were looking for a point of law contained on page 1269 of the opinion. Select *Go to Star Page* from the *Tools* menu at the bottom right of the screen. Next, enter 1269 in the *Star Page* box and click *Go*.

10   Suppose you wanted to find a specific term (isotonic) in the text of the opinion. Click the *Locate in Result* link at the top of the left menu. Next, enter *isotonic* in the *Locate Search Terms* box and click *Search*. Use the left and right *Term* arrows in the middle of the bottom frame to go directly to the term isotonic. It should be highlighted in yellow.

11   Suppose you wanted to copy a portion of the opinion with its citation and paste it into your own document. Highlight the desired portion of text and select *Copy with Reference* from the Tools menu. Then click *Copy* and paste it into your document.

Skill 3 Select a federal case law database

Out of the thousands of databases and resources available through LexisNexis & Westlaw, how do you locate and select those containing the information you require? In LexisNexis, an online resource is called a *Source*. Locate sources on LexisNexis using *Look for a Source*. In Westlaw, an online resource is called a *Database*. Locate databases using the Westlaw *Directory*.

Task 3a Locate a LexisNexis *source* containing federal case law

1   Click the *Search* tab to return to the LexisNexis *Search* service. Notice the four tabs located in the box labeled *Look for a Source*: *Legal*, *News & Business*, *Public Records*, and *Find a Source*. The *Legal*, *News & Business*, and *Public Records* tabs allow you to browse for sources by type. Click the *Find a Source* tab. The *Find a Source* box allows you to search the LexisNexis Source Directory. You may also browse for a source by title by clicking one of the numbers or letters located beneath the *Find a Source* box. Add tabs by clicking the *Add/Edit Tabs* link.

2   Let's locate a source using the *Legal* tab. Notice the various categories within the *Legal* tab denoted by a folder icon (📁). Notice that each category may be expanded by clicking the *View more sources* link. Notice the various sources listed under the *Cases-U.S.* category. Go to the bottom of the screen for a key to the various source-type icons located to the left of a source. Information about a source is available by clicking the (ⓘ) icon located to the right of a source. Click the *Federal Court Cases, Combined* source link. (Once you have selected your first source and conducted a search, a useful new option will appear on the *Search* service page allowing you to select from up to 20 of your most recently used sources.)

3   You are now at the LexisNexis *Enter Search Terms* search template screen. (See *Illustration 3* below.) You are ready to conduct a search.

Illustration 3 The LexisNexis Search Template

Task 3b Locate a Westlaw *database* containing federal case law

1   Click the *Directory* link in the top frame to enter the Westlaw Database Directory. The *Search these databases* box in the left frame allows you to search the Database Directory. You can also browse the Database Directory in the right frame. The *Recent Databases* pull-down menu in the left frame displays your most recently used databases.

2   Notice the various database menu entries for federal and state primary legal materials, international legal materials, topical materials by area of practice, news, and secondary legal materials. Click the *Cases* link under the *U.S. Federal Materials* heading. Information about a database is available by clicking the (ⓘ) icon located to the right of a database. Next, click the *All Federal Cases* link. Notice the database code is ALLFEDS.

3   You are now at the Westlaw search template screen. (See *Illustration 4* below.) You are ready to conduct a search.

Illustration 4 The Westlaw Search Template

Skill 4 Conduct a simple terms & connectors search

Searching on LexisNexis & Westlaw is more art than science and takes practice. You must analyze your problem, identify resources, select and organize search terms, and construct a search statement. Let's look at a sample problem, consider the steps involved in constructing a search statement, and conduct a simple search.

Consider the following problem: NewChip is considering a suit against their largest competitor MegaChip for theft of trade secrets. MegaChip recently hired away 15 of NewChip's top chip designers. The designers were involved in the development of NewChip's latest chip technology. The suit will seek an injunction preventing the 15 employees from working for MegaChip in jobs where they might possibly, even inadvertently, disclose NewChip trade secrets. You are asked to write a memo on the legal theories involved in preventing the disclosure of trade secrets by employees.

Analyze the problem. When analyzing a problem, consider: How much do you already know about the area of law? How much additional background information do you need? Do you know the legal jargon? Do you know the general principles or legal rules of thumb? Do you already have a case? a statute? a regulation?

Identify resources to search. Think about what you hope to find with your search. What information is needed to respond to your problem? What types of authorities (cases, statutes, regulations, constitutional provisions, etc.) are required? Based on your analysis, what resources are likely to contain the information you require?

Select and organize search terms including synonyms, antonyms and related terms. An efficient search requires a thoughtful selection of terms. You must consider synonyms, antonyms and related terms. Anticipating the various ways people can express the same concept, try listing the words you might use to formulate a search statement. What synonyms and related terms would you add to these? Think about the resource you are going to search, what terms make the most sense for that source? With LexisNexis, after you have selected a source and entered your terms in the *Enter Search Terms* box, use the *Suggest Terms for My Search* link to display a menu of additional terms. With Westlaw, use the *Thesaurus* link. (See *Illustrations 3 & 4* above.)

Which search mode: *Terms & Connectors* or *Natural Language*? LexisNexis & Westlaw offer two search modes: *Terms & Connectors* and *Natural Language*. Terms & Connectors (or Boolean) searching offers a high degree of control over the search and affords you the potential of locating all relevant documents. Natural Language searching allows you to use words and phrases descriptive of your problem in a question-like format. Natural Language searching is good for finding some, but not all relevant documents. LexisNexis offers a third Google-like natural language search mode called *Easy Search*.

Segments and Fields. Normally, your search your terms can appear anywhere in the document retrieved. You can optimize your search by specifying the particular sections of the document to be searched. This is known as segment searching on LexisNexis and field searching on Westlaw. Segments and fields can be combined with terms & connectors to construct simple yet precise searches. With LexisNexis, use the *Restrict by Segment* pull-down menu located just below the *Enter Search Terms* box to display a menu of the segments available for your source. Segments vary by the types of documents in a source. You may use the menu to add segment restrictions to your search statement or type them directly into the *Enter Search Terms* box. With Westlaw, available fields are displayed in the Fields pull-down menu. Once you know the field codes, you may type them directly into the search box. The LexisNexis and Westlaw segment and field syntaxes are very specific and must be followed exactly: segment or field code followed by parenthesis containing a search statement. Here is an example of a LexisNexis segment search: OPINIONBY(flaum) and here is an example of a Westlaw field search: OP(flaum) both searching for cases whose principal opinion was authored by Judge Flaum. (See *Illustrations 3 & 4* above.)

Connectors & Expanders. Connectors and expanders allow you to specify a logical relationship between your search terms in the documents retrieved, such as one term *and* the other, one term *or* the other, or one term *within the same sentence* of the other. With LexisNexis, a box listing available *Search Connectors* is displayed just to the right of the *Enter Search Terms* box. With Westlaw, a list of connectors is displayed in a box just below the search box. (See *Illustrations 3 & 4* above.)

Selected LexisNexis & Westlaw Connectors & Expanders		
To Retrieve Documents with:	**LexisNexis**	**Westlaw**
Search terms as a phrase[1]	Quotes not necessary	**""**
Either or both search terms in the same document	**or**	[a space] *or* **or**
The first search term preceding the second by "*n*" terms	**pre/n**	**+n**
Search terms within "*n*" terms of each other	**/n**	**/n**
The first term preceding the second within the same sentence	No equivalent	**+s**
Search terms in the same sentence	**/s**	**/s**
The first term preceding the second in the same paragraph	No equivalent	**+p**
Search terms in the same paragraph	**/p**	**/p**
Search terms in the same segment (any segment)	**w/seg**	No equivalent
Search terms in the same document	**and** *or* **&**	**&** *or* **and**
Search terms in the same document but not within "*n*" terms of each other	**not/n**	No equivalent
To exclude documents containing a term (use extreme caution; place at end of search statement)	**and not**	**%** *or* **but not**
Root Expander: search terms beginning with the same root	**!**	**!**
Universal Character: use an asterisk within a term as a single character wildcard, use one or more asterisks at the end of a term to specify the term's maximum length[2]	*****	*****
All forms of a compound word (hyphenated)	No equivalent	Use the hyphenated form
All forms of an abbreviation or initialism	No equivalent	Use the form with periods but without spaces (f.b.i.)
Search term appears at least "*n*" many times in document	atleast*n*(term)	atleast*n*(term)[3]
Search only the plural or singular form of a term[4]	plural(term), singular(term)	Use the plural form, #term

1 With Westlaw, a phrase must be in quotes otherwise the space between terms is interpreted as an "*or*" connector.
2 For example, use the search term dr*nk to locate drink, drank, drunk, etc.; use the search term bank*** to locate bank, banker, banking, etc. but not bankruptcy
3 With Westlaw, the *atleast* command is only available in news and law review databases not in cases.
4 With LexisNexis, use any form of a noun to automatically locate its singular, plural, and possessive forms (only works when plural form is regular). With Westlaw, use the singular form to automatically locate the plural and possessive forms (works with most irregular plurals). With Westlaw, the plural form retrieves only the plural form. Use # in front of a term to locate only its singular form.

The best search is the simplest search. A simple, elegant search statement with only a few connectors will almost always work better than a more complex one. With a complex search statement, you must consider the order in which connectors are processed. Processing does not run from left to right. Connectors are processed in the following order of priority:

- LexisNexis: or; /n; pre/n; not/n; /s; /p; /seg; and; and not
- Westlaw: space (or); +n; /n; +s; /s; +p; /p; &; %

For instance, the *or* connector in the search statement *a and b or x and y* would be processed first not the *and* connector. When in doubt, use parentheses to group terms & connectors in your statement. Connectors inside parentheses have priority over and are processed before connectors outside parentheses: *(a and b) or (x and y)*.

Broad or narrow search? Imagine you have analyzed the trade secrets problem, selected and organized search terms, constructed several potential terms & connectors search statements, and decided to begin by searching for federal case law. Assuming all your searches will retrieve at least some relevant cases, how do you know which search is best? The one with the most hits? or the one with the fewest? The answer is dictated by your strategic needs: do you need to see every relevant case (broad search) or do you need to see just a few good cases (narrow search).

Below are examples of LexisNexis and Westlaw terms and connectors searches constructed of terms taken from the trade secrets problem. Broaden a search by using fewer terms and looser connectors like */p*. Narrow a search by adding additional terms and using tighter connectors like */s*. Add precision to a search by using segments (LexisNexis) and fields (Westlaw).

Sample LexisNexis Terms & Connectors Searches (*Federal Court Cases, Combined*, September 2006)
trade secret /p disclos!	(Hits: >3,000*)
trade secret /s disclos!	(Hits: >3,000*)
trade secret /s disclos! /s prevent	(Hits: 337)
trade secret /s disclos! /s prevent /s employe*	(Hits: 104)
trade secret /5 disclos! /5 prevent /5 employe*	(Hits: 57)
ln-summary(trade secret /s disclos! /s prevent /s employe*)	(Hits: 53)
headnotes(trade secret /s disclos! /s prevent /s employe*)	(Hits: 37)

*Maximum hits on LexisNexis is 3,000

Sample Westlaw Terms & Connectors Searches (*All Federal Cases*, September 2006)
"trade secret" /p disclos!	(Hits: 4,710)
"trade secret" /s disclos!	(Hits: 4,016)
"trade secret" /s disclos! /s prevent	(Hits: 289)
"trade secret" /s disclos! /s prevent /s employe*	(Hits: 91)
"trade secret" /5 disclos! /5 prevent /5 employe*	(Hits: 36)
sy,di("trade secret" /s disclos! /s prevent /s employe*)	(Hits: 44)
212k138.33 /75 ("trade secret" /s disclos!)	(Hits: 61)

Task 4a Conduct a LexisNexis terms & connectors search

1 In the LexisNexis *Enter Search Terms* box (see *Illustration 3* above), enter the following terms & connectors search statement:
   trade secret /s prevent /s disclos! /s employe*
2 Click Search. Your search should return approximately 104 cases. You should be viewing a list of citations in the middle frame. The cite list includes case citations, overviews (written by LexisNexis editors), core terms (computer generated key terms), and hits (short snippets from the case showing your search terms in context). To shorten your cite list, click the *Hide Hits* link located in the middle of the top frame.
3 You are now ready to navigate your search results.

Task 4b Conduct a Westlaw terms & connectors search

1 In the Terms & Connectors query box (see *Illustration 4* above), enter the following search statement:
   "trade secret" /s prevent /s disclos! /s employe*
2 Click *Search*. Your search should return approximately 91 cases. Notice the search terms are displayed in context and are highlighted in yellow. Notice the *ResultsPlus* box to the right of the cite list. *ResultsPlus* locates relevant explanatory materials like treatises, legal encyclopedias and ALR annotations as well as key numbers based on your search. Select *Hide Terms in List* from the *Result Options* menu located at the right of the bottom frame to turn off the display of highlighted terms and context.
3 You are now ready to navigate your search results.

Skill 5 Navigate your search results

Searching is an extremely circular process. As you read the through your search results you will learn new, better search terms. You will also learn the jargon, terms of art, and buzz words used to describe your issue. You can then use these to edit your search statement and create a much more precise search.

Task 5a Navigate your LexisNexis search results

1   Scroll through your search results cite list until you locate the *PepsiCo v. Redmond* opinion. (It should be approximately number 7.) Click its link. Notice the four viewing formats at the left of the top frame: *Cite*, *KWIC*, *Full*, and *Custom*. Cite returns you to your search result cite list. KWIC (Key Words In Context) truncates the case to show only those portions of the case containing your search terms. Full displays the full text. Custom allows you to limit your display to selected segments of the case.

2   KWIC is useful for scanning a document quickly to determine if it is relevant. Click the KWIC link. Return to full view and use the Term arrows in the bottom frame to locate your search terms in the *PepsiCo* opinion. You can use the Term arrows to browse up or down through your search results term-by-term.

3   Browse document-by-document using the Previous and Next arrows in the top frame or the Doc arrows in the bottom frame.

4   A common and efficient search strategy is to use the *FOCUS* service to run a secondary search on your initial search results. Suppose you wanted to know which of your 104 cases discusses the doctrine of inevitable disclosure of trade secrets. In the *FOCUS Terms* box, delete your search statement and replace it with this search: **inevitab! /s disclos!**, search within All Documents and click *Go*. Your set has now been reduced from about 104 cases to about 21. Link to the *PepsiCo* case (it should be first) and use the Term arrows located in the bottom navigation toolbar to browse for your search terms. (To exit the focus set and return to your initial search results, go to the top of the case and click the *Exit FOCUS* link.)

5   You are now ready to review your search history and email yourself a case from LexisNexis.

Task 5b Navigate your Westlaw search results

1   Scroll through your search results cite list until you locate the *PepsiCo v. Redmond* opinion. (It should be approximately number 6.) View the case by clicking its link. (You can limit the display to only selected fields of the case by selecting *Limit by Fields* in the *Tools* menu at the right of the bottom frame.)

2   Use the *Term* arrows in the bottom frame to locate your search terms in the *PepsiCo* opinion. You can use the *Term* arrows to browse up or down through your entire search result list term-by-term.

3   Browse document-by-document using the *Doc* arrows in the bottom frame.

4   A common and efficient search strategy is to use the *Locate* service to run a secondary search on your initial search results. Suppose you wanted to know which of your 91 cases discusses the doctrine of inevitable disclosure of trade secrets. Click the *Locate in Result* link located near the top of the left frame and enter this search: **inevitab! /s disclos!** in the *Locate Search Terms* box and click *Search*. Your set has now been reduced from about 91 cases to about 19. Click the *Result List* tab and go to the *PepsiCo* case. Use the *Term* arrows located in the bottom frame to browse for your new search terms. (To cancel your Locate set and return to your initial search results, click the *Cancel Locate* link at the top of the left frame.

5   You are now ready to review your search history and email yourself a case from Westlaw.

Skill 6 Capture your research: email yourself a case & review your search history

LexisNexis & Westlaw allow you to capture your search results by email, by download or by print. You may email, print or download the document you are currently viewing, all the documents in your search result list or just selected documents. The documents may be in citation, full or custom formats. You may further limit the email, print or download to selected segments or fields of the document. Use *History* on LexisNexis and *Research Trail* on Westlaw to review your research activities.

Task 6a Email yourself a case from LexisNexis & review your search history

1   While viewing the PepsiCo case, click the *Email* link at the right of the top frame.

2   Enter your email address in the *To* box. Enter a *Subject Line* and *Add a brief note* (something like: this is great!). For *Document View*, select *Full* and choose to show *Case Summary* and *Headnotes* and *Dual Column Print*. For *Document Range*, select the current document. Decide whether to send as an Attachment or Inline Text. If as an attachment, select its file format (word, wordperfect, pdf or rtf) and file name. Decide upon your *Page* and *Formatting Options*. Click *Send*.

3   Click the *History* link at the right of the top frame. *History* displays a linked list of your LexisNexis activities. Review what you did today under the *Today's Results* tab. Review your activities from the past 29 days under the *Archived Activity* tab.

Task 6b Email yourself a case from Westlaw & review your search history

1   Click the *E-Mail* button located at the right of the top frame. Your email address should already appear in the *Print or deliver to* box. (Notice the pull-down menu allows you to select other print and download options.) Click the *Properties* button to change your email address and file and delivery formats. Add a subject line. Review the *Range* and *Content* settings. Click *Send Request* to email the case.

2   The *PepsiCo* case will arrive as an attachment unless you selected the in-line text format. When opening the attachment, notice the live embedded links.

3   Click *Research Trail* located at the upper-right of the top frame. *Research Trail* displays a linked list of your Westlaw activities in reverse chronological order and is a sophisticated tool for managing your Westlaw activities. A Trail is erased after 14 days but can be extended. Click the *Download Trail* link to download your trail as an HTML file. Click *E-Mail Trail* to send yourself a copy of your research session. For Delivery Format, select inline or attached HTML. Research activity links are live using the HTML format.

Skill 7 Sign off from LexisNexis & Westlaw

End your LexisNexis & Westlaw sessions by signing off.

Task 7a Sign off LexisNexis

1   Click *Sign Off* at the extreme right of the top frame.

Task 7b Sign off Westlaw

1   Click *Sign Off* at the extreme right of the top frame.

Congratulations! We hope this tutorial has helped you get started with LexisNexis & Westlaw. Please do stop by, email or call the Langdell reference desk, 617-495-4516, langref@law.harvard.edu, with any questions.