The title above is somewhat deceptive, because there is no single definitive “how to search” process—this varies across disciplines, media, and most of all, individuals. But there are some broad strokes and that’s what we have here.

“Open” Searches

…a.k.a. “needle in a haystack.” You’re alone with an information need and an empty text field. What do you do? Theoretically, you can keep typing random symbols until you find what you need, but that will take too long (really).

- **Identify terms within your area of interest.** You must know at least a handful. They might be too general at first, but it’s better than nothing.
- **Refine your vocabulary as you search.** Even now you are learning new things. Be sensitive to terms with fewer interpretations—those will make your results more precise. Proper names and technical terms become useful here. It may take a few rounds (and readings) to acquire this vocabulary. It also helps if you are aware that you are in the process of refining your vocabulary.
- **Know your search tool.** Google popularized the “single empty text field” approach, but other search tools have finer-grained controls which may be worth learning.
- **Track what works and what doesn’t.** Consciously evaluate the quality of your search results every time. Gradually you will get a feel for the queries that yield the results you want.
- **Be aware of other media.** Some searches can’t be expressed in words—you’ll want something that “looks like this” or “sounds like this.” Tools do exist for searches of this type; give those a try and possibly return to text searches after you derive additional vocabulary from those results.

Note the key ingredient in these tips is **self-awareness.** Stay conscious of your queries, how you “tweak” them, and why. It is this cycle of refinement that builds your skill set over time.

“Genre” Searches

The term “genre” here is derived from its use in the phrase “genre literacy,” which computer scientist Alan Kay coined to represent specific knowledge of a particular body, or genre of work. Once you have become sufficiently familiar with a particular subject or topic, you start knowing where “the good stuff” will likely be: key authors or communities; prominent publications; centers of progress in the field. With that, you can focus and move very quickly. In a sense, this is the reward for achieving genre literacy—you can find what you need faster and more accurately.

Not surprisingly, an easy way to start learning a genre is to have someone guide you through it—surprise surprise, here is a key function of your research mentor. This person is most likely a genre expert already, and in a matter of minutes can rattle off authors, seminal works, important institutions, and foundational readings that you can just happily take down then chase down. It’s as close to a shortcut as you can get.

Of course, your research mentor isn’t the only expert, just the easiest one to reach. As you learn the literature of your field, you will identify additional experts as well as peers. It never hurts to ask them, once you know who they are.

Beyond your mentor, the “genre” comes to your aid in other ways:

- **Follow the references.** Formal scholarship holds, as a prime value, giving credit where credit is due. Aside from being fair, this practice is useful. You can see the bases from which something was derived—sometimes, the sources of your sources might be more useful than the sources themselves. Many resources also cite forward—they can show you what later work subsequently cited the one that you have. Don’t hesitate to follow these breadcrumbs.
- **Follow the authors.** If an author writes something of interest, chances are that their other work will be of interest also. You can revert to an “open” search on that author’s name or look at their
body of work to find more possibilities. Works by multiple authors expand the range even more—now you have two, three, or more names to look up.

- Follow the publications. Once you find a useful journal article, chances are that this same journal has other articles of interest. Common sense, right? As you get to know your discipline, you gain an idea for where people go to disseminate new findings or new work. Not all venues are equal; some have more authority and prestige; some are more popular or accessible. Get to know these venues and their qualities. Eventually, you will learn to go there first to find what you need.

Note here that, as with “open” searches, the prime ingredient is again a self-aware approach to searching. Be aware that you are on the lookout for authoritative practitioners or creators. Take note of them when you find them. Learn how to scan a bibliography, or read citations in context, so that you get a better sense of which references are more likely worthwhile to follow than not.

One might argue that searching is one of those activities where “the journey is its own reward” does not hold. Certainly, there is a degree of pleasure in the process of searching and browsing—but sometimes, you simply want to find that thing that you need. Because, in research, it's in those found sources that the true journey begins.