# Document Similarity notebook – help pages Introduction

The Document Similarity tool, as part of the <u>Australian Text Analytics Platform</u> (ATAP) project, is a Python package with a Jupyter notebook interface, developed by the <u>Sydney Informatics Hub</u> (SIH) in collaboration with the <u>Sydney Corpus Lab</u>. It uses <u>MinHash</u> to efficiently estimate the <u>Jaccard similarity</u> between sets of English language documents.

(Note: if you are unfamiliar with how to use Jupyter Notebooks, have a look at this guide.)

## Getting started

The tool is available on <u>GitHub</u> where you can launch the tool as a Jupyter Notebook via Binder by clicking on one of the 'launch binder' buttons:

## Setup

This tool has been designed for use with minimal setup from users. You are able to run it in the cloud and any dependencies with other packages will be installed for you automatically. In order to launch and use the tool, you just need to click the below icon.

## g launch binder

Note: CILogon authentication is required. You can use your institutional, Google or Microsoft account to login.

If you do not have access to any of the above accounts, you can use the below link to access the tool (this is a free Binder version, limited to 2GB memory only).

## g launch binder

It may take a few minutes for Binder to launch the notebook and install the dependencies for the tool. Please be patient.

The access to the ATAP Binderhub (i.e., the first 'launch binder' button) requires CILogon authentication, which supports single sign-on (SSO) method with most (Australian or international) institutional login credentials as well as some other accounts. If you have access to software that supports Jupyter Notebooks, you can also clone the Github repository and use the notebook locally (i.e., without Internet connection) on your own computer.

## Overview of Tool

If you have already read <u>the blog post introducing this tool</u> or are familiar with the tool, you can skip this general overview section and will find the tool explanation from <u>here</u> onwards.

The tool is designed to first remove all identical documents in a dataset or corpus. The tool will then compare every pair of remaining documents in the dataset or corpus and produce similarity scores. Based on several customisable parameters (or the default values), the tool retrieves pairs of texts whose similarity scores exceed the pre-determined cut-off. The result of this analysis is presented as a table containing a list of similar documents (in pairs) found by the tool — an example is shown in Table 1 below. Based on this analysis, the tool makes

recommendations about which text within each similar pair should be kept or removed – as shown in the 'status1' and 'status2' columns in Table 1.

Table 1. Results of similarity analysis

	text_id1	text_name1	word_count1	status1	similarity	text_id2	text_name2	word_count2	status2
0	03eec57bba	text4	553	keep	1.0000	611849dd2b	text10	552	remove
1	2be0d88401	text5	202	remove	0.9922	124c11ee87	text2	200	remove
2	03eec57bba	text4	553	keep	0.9883	c756f03105	text7	555	keep
3	611849dd2b	text10	552	remove	0.9883	c756f03105	text7	555	keep
4	d726445d84	text6	92	keep	0.9805	752e10b6f7	text3	90	remove
5	35ea0dcfe0	text8	205	keep	0.9766	124c11ee87	text2	200	remove
6	d726445d84	text6	92	keep	0.9766	68bb00bb29	text9	92	remove
7	03eec57bba	text4	553	keep	0.9727	ee10095c6f	text1	547	remove

The tool allows you to view the content of selected similar documents (by specifying the row index you wish to analyse; see Figure 1 below), analyse them, and update the actions (i.e., 'keep' and 'remove'). You can then download the non-duplicated texts (those labelled as 'keep') or the duplicated ones (those labelled as 'remove') into a zip archive of text (.txt) files.

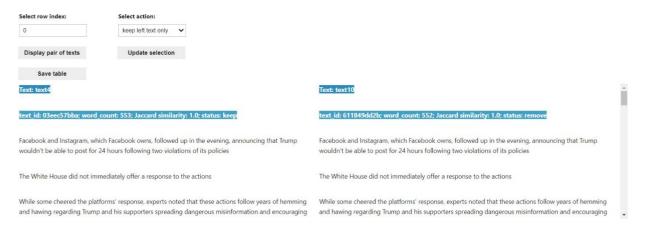


Figure 1. Viewing and comparing each pair of texts in order to adjust the action (i.e., 'keep' or 'remove')

Additionally, the tool allows you to visualise the Jaccard similarity scores as a histogram (Figure 2). The histogram shows the Jaccard similarity scores for every pair of texts/documents in the corpus, and how many similar documents are found at those Jaccard similarity score ranges across the corpus. This is useful for estimating the extent of duplicated content in a corpus.

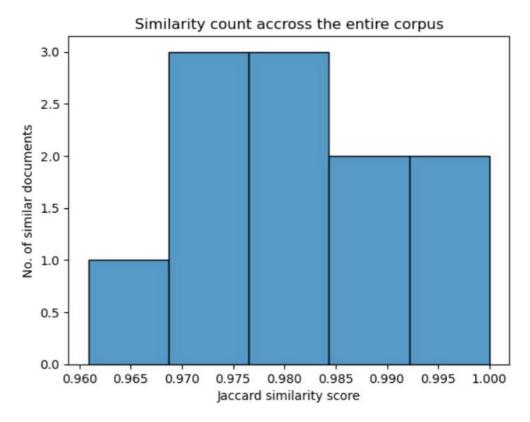


Figure 2. Histogram of the count of similar documents in the corpus found in particular Jaccard similarity score ranges.

Another, optional, visualisation shows the Jaccard similarity scores between specific pairs of texts/documents as a heatmap. This can be useful for identifying the texts that are most similar to each other but works best with small numbers of texts. This optional feature of the tool could be used to compare texts produced by different speakers/authors in a dataset.

## Setup

Before you begin, you need to import the DocumentSimilarity package and the necessary libraries and initiate them to run in this notebook.

1. Execute the cell (as a reminder, you can do this by pressing 'Ctrl' + 'Enter' on PC or 'Cmd' + 'Enter' on Mac):

```
[]: # import the DocumentSimilarity tool
    print('Loading DocumentSimilarity...')
    from document_similarity import DocumentSimilarity, DownloadFileLink
    import sys

# initialize the DocumentSimilarity
ds = DocumentSimilarity()
    print('Finished loading.')
```

2. Once completed, you should get a message saying, "Finished loading":

```
[1]: # import the DocumentSimilarity tool
    print('Loading DocumentSimilarity...')
    from document_similarity import DocumentSimilarity, DownloadFileLink
    import sys

# initialize the DocumentSimilarity
    ds = DocumentSimilarity()
    print('Finished loading.')

Loading DocumentSimilarity...
    BokehJS 2.4.3 successfully loaded.

Finished loading.
```

## Load the data

Next, you can upload your text data in a text file (or a number of text files) or a CSV spreadsheet using the ATAP Corpus Loader.

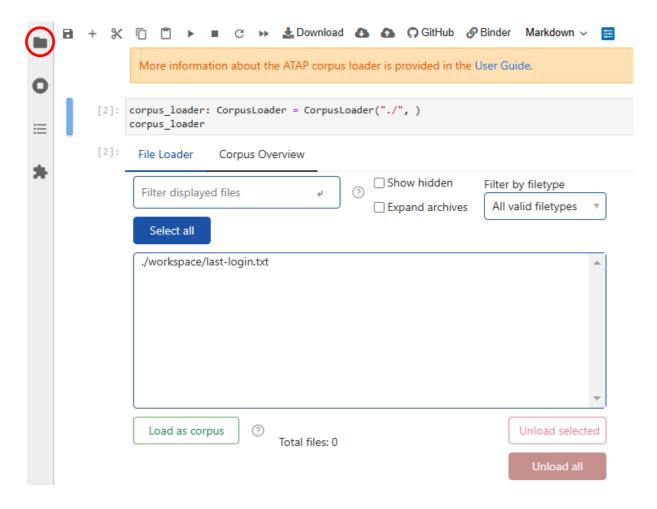
1. Execute the cell:

```
[ ]: corpus_loader: CorpusLoader = CorpusLoader("./", )
corpus_loader
```

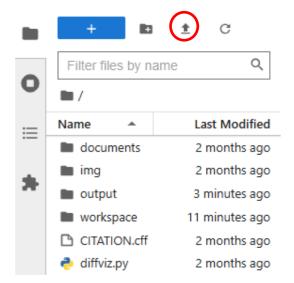
Once completed, you should see the ATAP Corpus Loader UI:

corpus_loader: CorpusLoad	der = CorpusLoader("./", )		
File Loader Corpus Ove	erview		
Filter displayed files  Select all	② □ Show hidden □ Expand archiv	Filter by filetype  All valid filetypes	
./workspace/last-login.txt			
Load as corpus ③	Total files: 0	Unload selected Unload all	

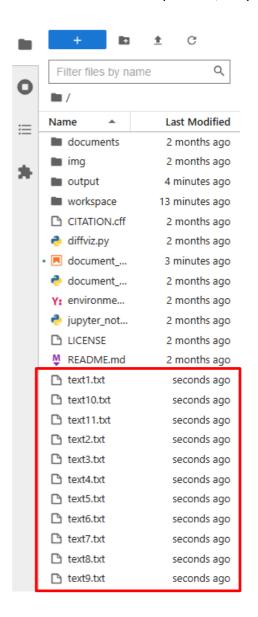
2. Open the file browser by clicking on the file symbol on the far-left menu (circled in red below):



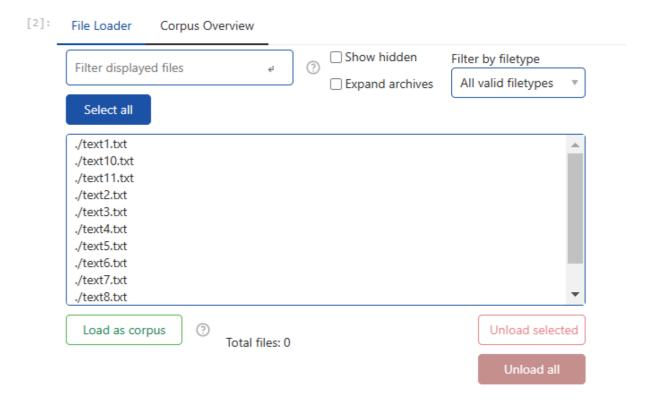
3. To upload your files, click the 'Upload files' symbol (circled in red below):



Once the files are uploaded, they should appear at the end of the list. For example:



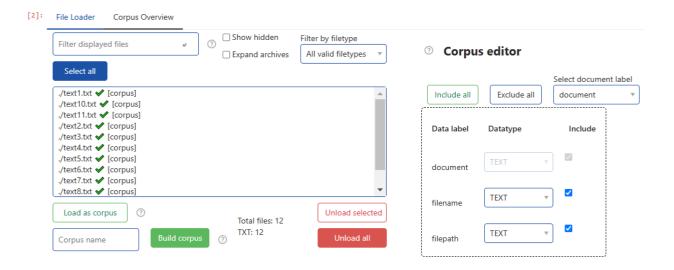
The files you uploaded should also appear in the Corpus Loader, for example:



4. Select the files you want to include by clicking on them. You can select multiple files by clicking while holding Ctrl (for Windows) or Cmd (for Mac). You can also click on 'Select all' to select all of the files listed:

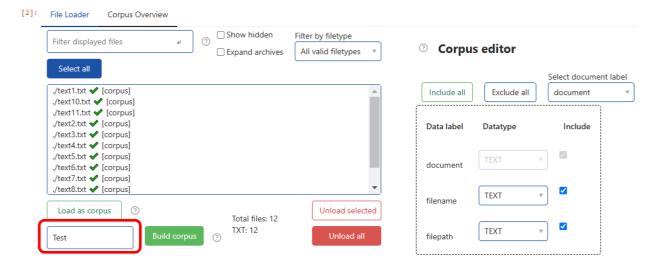
2]:	File Loader	Corpus Overvie	èW.			
	Filter displaye	d files	ا ب	Show hidden	Filter by filetype	
	- mer displaye			☐ Expand archives	All valid filetypes	
	Select all					_
	./text1.txt					<b>.</b>
	./text10.txt					
	./text11.txt					
	./text2.txt					
	./text3.txt					
	./text4.txt					
	./text5.txt					
	./text6.txt					
	./text7.txt					
	./text8.txt				,	•
	Load as corp	ous ? Tot	al files: 0		Unload selected	d
					Unload all	

5. Once you've selected the files you want, click "Load as corpus". The files you've selected to be included in the corpus should have a green check mark and the label '[corpus]' next to them. For example:



Additionally, you should see a Corpus Editor to the right of the Corpus Loader. If you've loaded plain text files, the Corpus Loader also automatically creates and includes the filename as TEXT type metadata. If you're loading a CSV spreadsheet with multiple columns, first, you can use the Corpus Editor adjust which columns are to be included your corpus and the corresponding datatype.

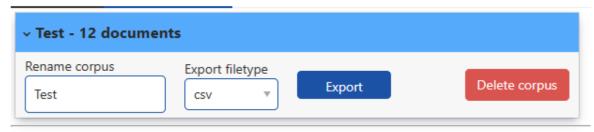
6. You can optionally name your corpus by replacing the text "Corpus name" with the chosen name. For example, the following corpus has been named 'Test':



If you choose not to give your corpus a name, the tool will automatically give it one.

7. Click on "Build corpus". The Corpus Loader will switch from the File Loader view to the Corpus Overview view:





#### Test

Data label	document_	filename	filepath
Datatype	TEXT	TEXT	TEXT
First document	Facebook and Instagram, which Facebook owns, follo	text1	./text1.txt

8. Execute the following cell to identify and remove all identical documents in the corpus (i.e., those with 100% similarity with another):

```
[ ]: # Grab the corpus that was last built for processing.
    # Alternatively, one can replace the first line of code with "corpus = corpus_loader.get_corpus('corpusname')"
    corpus = corpus_loader.get_latest_corpus()
    ds.set_text_df(corpus)
```

9. Once completed, you will get a message saying how many identical documents were identified as well as how many were kept or removed.

```
[3]: # Grab the corpus that was last built for processing.
# Alternatively, one can replace the first line of code with "corpus = corpus_loader.get_corpus('corpusname')"
corpus = corpus_loader.get_latest_corpus()
ds.set_text_df(corpus)

2 duplicated (identical) files in 1 groups were found.
The first file of each group 1 is kept in the corpus and the other 1 files are removed.
The filenames can be checked in the following spreadsheet.
identical_docs.xlsx
```

The tool also produces a downloadable CSV file which provides the filename of the retained file (in a "kept" column) and the file names of the relevant identical (i.e., excluded/removed) files in subsequent numbered columns.

Please note that you now have a partially deduplicated corpus (i.e., all identical documents have been removed) and you'll be examining the similarity among the remaining non-identical documents form this point onwards.

10. Execute the following cell to view a snippet of the contents of the remaining files you've uploaded:

```
[ ]: # display uploaded text
n=5

ds.text_df.head(n)
```

By default, you can view (up to) five of the files. You can adjust this by changing the number value in "n=5" code (to e.g., n=2, n=10, n=20) before you execute the cell.

```
[4]: # display uploaded text
      n=5
     ds.text df.head()
[4]:
                                                                                                text id
                                                   text text_name
      0 Facebook and Instagram, which Facebook owns, f...
                                                              text1 827139c4d1071af59865acfdde8411ed
      1 Facebook and Instagram, which Facebook owns, f...
                                                             text10 50431f2596c7ab2ab07198533c9c409a
      3 (CBC News) Republican lawmakers and previous a...
                                                                     0ffd917f3646c7b9b697a871e8177bf3
                                                              text2
           Federated States of Micronesia President David...
                                                                      1dcf3eff30c12de4aa90c833fca6d280
                                                              text3
      5 Facebook and Instagram, which Facebook owns, f...
                                                              text4 1f6dbb2b0fa4c6efd1e8d1a0ca485b65
```

## Calculate Document Similarity

Once your texts have been uploaded, you can begin to calculate the similarity between documents in the corpus. The DocumentSimilarity tool uses Jaccard similarity to measure the similarity between documents.

1. You can change the variables/parameters (for calculating similarity) in the cell shown below:

```
[ ]: # USER SPECIFIES THESE VARIABLES
     # set the n-gram size (the number of words used to detect similarity),
     # e.g., n-gram=1 means compare every word ('apple' and 'orange'),
     # n-gram=2 means compare every pair of words ('one apple' and 'two oranges'), etc.
     ngram_value = 1
     # select whether to calculate actual or estimated Jaccard similarity
     # to measure the similarity between documents
     # we recommend using estimated Jaccard similarity for large corpus of documents (faster)
     actual_jaccard = False # True or False
     # whether to exclude punctuations when calculating Jaccard similarity
     ds.exclude_punc = False # True or False
     # set the number of permutation functions (num_perm) parameter for estimating Jaccard similarity
     # higher permutation functions improves the accuracy, but also increases query cost
     num_perm = 256
     # anything with >= the cutoff will be identified as similar documents
     similarity_cutoff = 0.5 # value should be between 0-1
```

- 2. Set the *n*-gram (i.e., strings of adjacent word/s) size, which is used by the tool to detect similarity. You can do this by changing the number value in "ngram\_value = 1". For example, "ngram\_value = 2" means compare every 2-word strings (e.g., "one apple" and "two oranges"), "ngram\_value = 3" means every 3-word strings (e.g., "one green apple" and "two blood oranges"), and so on. The default setting is "ngram\_value = 1" meaning that the tool compares every individual word (e.g., "apple" and "orange").
- 3. Select whether to calculate actual or estimated Jaccard similarity to measure the similarity between documents. By default, the tool uses the "actual\_jaccard = False" setting which means it will only estimate the Jaccard similarity with MinHash. To calculate actual Jaccard similarity scores on possible pairs, change the value from "False" to "True" (i.e., "actual\_jaccard = True").
- 4. Select whether to exclude punctuations when calculating Jaccard similarity. The tool will include punctuations by default (i.e., "ds.exclude\_punc = False"). If you want the tool to ignore punctuations, change the value from "False" to "True" (i.e., "ds.exclude\_punc = True").
- 5. Set the number of permutation functions (num\_perm) parameter for estimating Jaccard. Higher similarity permutation functions improve the accuracy, but increase the time needed to complete the calculation.
- 6. Set the similarity cut-off. This value needs to be between 0 and 1. The default cut-off is 0.5 (i.e., "similarity\_cutoff = 0.5"). Any documents with similarity scores higher than or equal to the cut-off will be identified as similar documents.
- 7. Execute the cell to set the parameters for the similarity calculations.
- 8. Execute the following cell to begin the similarity calculations:

```
[]: # begin the process of calculating similarity and identify similar documents ds.calculate_similarity(ngram_value, num_perm, similarity_cutoff, actual_jaccard)
```

9. Once the calculations are completed, if you get a message telling "No similar documents found. Please use lower similarity cutoff to find similar documents...", it means no similar documents can be found in your corpus/dataset under the current settings/parameters. If there are similar documents, you will get a message telling you how many pairs of similar documents are in your corpus/dataset. For example:

```
[6]: # begin the process of calculating similarity and identify similar documents
ds.calculate_similarity(ngram_value, num_perm, similarity_cutoff, actual_jaccard)
```

12 pairs of similar documents are found in the corpus.

Please note that the following uses of the tool will only be possible if similar document pairs are identified in your corpus/dataset.

## Analyse similar documents

Once the tool has finished calculating the document similarity, you can visualise and analyse the outcome.

## Histogram of similar documents

You can use the tool to produce a histogram of the count of similar documents in the corpus as measured by their Jaccard similarity. Using the histogram, you can identify how many documents are found at different level of similarity measures.

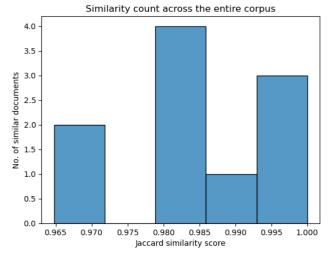
## 1. Execute the following cell:

```
[ ]: # plot the similarity count accross the entire corpus ds.plot_hash_similarity_by_source(ds.deduplication_df)
```

## 2. Once completed, you should get a histogram like the one below:



[7]: <AxesSubplot:title={'center':'Similarity count across the entire corpus'}, xlabel='Jaccard similarity score', ylabel='No. of similar documents'>



#### Heatmap of similar documents

You can produce a heatmap that shows the Jaccard similarity scores between pairs of similar documents. The heatmap only displays pairs of similar documents with scores above the similarity cut-off, as defined during the similarity calculations step.

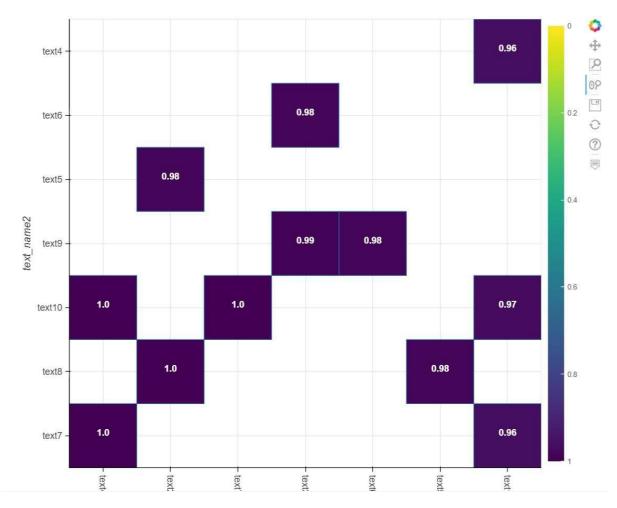
1. You can set/change the settings (e.g., define the plot width, height, font size, and font colour) for the heatmap in the cell shown below:

- 2. Set the plot width and plot height for the heatmap by changing the number value. By default, the size of the heatmap will be 900 x 800 pixels (i.e., "plot\_width = 900" and "plot height = 800").
- 3. Set the font size for the size of the text for the title, axis labels (i.e., the name of the axis), the scale/units of the axis, and the Jaccard similarity score in the plot. The default font size is 14 (i.e., font\_size = '14px').
- 4. Set the font colour for the Jaccard similarity scores in the heatmap. White is the default font colour (text\_color = 'white') with black being recommended as the alternate colour. However, you can use other CSS colour names (e.g., cyan, lime, pink, yellow; see <a href="here">here</a> for the full list of colour names). Please note that if you enter an invalid colour (i.e., a name or word for a colour the tool does not recognise), then the Jaccard similarity scores will not appear in the resulting heatmap.
- 5. Execute the cell once you're happy with the settings.

6. Specify the range of matched documents to be included in the heatmap:

Entering an integer number, such as "30", will generate the figure with the top-30 pairs of the similar documents. Entering a number range like "15-45" will generate the figure with the selected range (i.e., the 15<sup>th</sup> to the 45<sup>th</sup>) of the document pairs. Entering "y" will proceed with all pairs of similar documents. Entering "n" will cancel the figure generation.

7. Click 'Enter' (on your keyboard) once you've entered the value you want, and the tool will produce a heatmap:



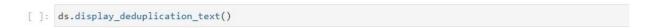
The x-axis and y-axis show the text\_id of the similar document pairs (you can hover over the similar nodes to display the text name pairs in the tooltip). You can also zoom in/out

of the heatmap, move it around, download/save the visualisation to your local computer using the interactive toolbar on the right hand-side of the heatmap.

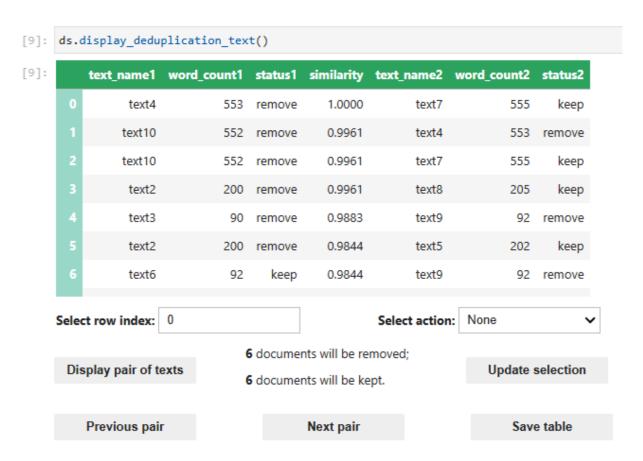
## Analyse similar documents

You can generate a list of similar documents (in pairs) found by the tool, based on the similarity cutoff specified earlier. By default, the tool makes recommendations on whether to "keep" or "remove" each similar document within each similar pair. You can view each pair of similar documents (by specifying the row index you wish to analyse), and then update the action/recommendation (i.e., "keep" or "remove") accordingly.

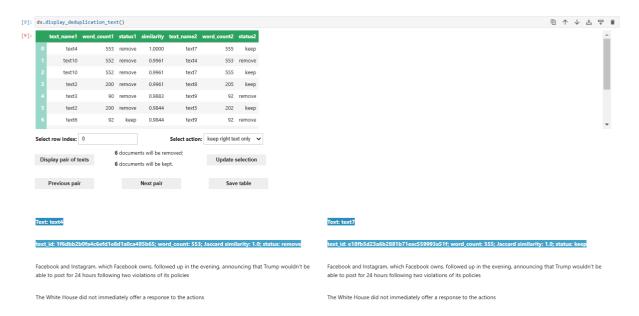
1. Execute the cell shown below:



2. The tool should produce a table that displays texts identified as similar based on the Jaccard similarity cut-off selected earlier. For example:



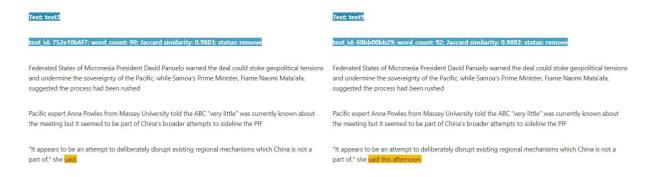
3. Click on "Display pair of texts" to view each pair of similar texts.



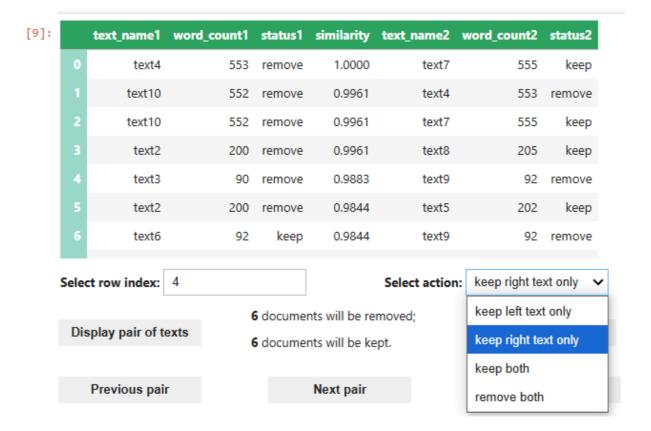
To view different pairs of similar texts, click "Previous pair" or "Next pair". To view a specific pair, type the corresponding row number (for the pair of texts you wish to view) into the box next to "Select row index".

Alternatively, you can type a row number into "Select row index" to view a specific row. By default, the tool will show the first pair which is in row 0. Replace the 0 with 1 to view the second pair of texts, replace with 2 to view the third pair, and so on.

When you are viewing the pair of texts side by side, you may see text highlighted in yellow. These are chunks of texts that are not identical within the identical pair. For example:



4. After viewing the similar pair of texts, click on the drop-down menu next to "Select action" to update the status (i.e., either to "keep" or "remove") for each text in the pair:



As you can see in the image above, you have the option to "keep left text only" (i.e., status1 is "keep", status2 is "remove"), "keep right text only" (i.e., status1 is "remove", status2 is "keep"), "keep both" (i.e., status1 and status2 are "keep"), or "remove both" (i.e., status1 and status2 are "remove").

5. You can save the table by clicking on "Save table". Click on the link to a csv file that appears to download and save it to your computer:

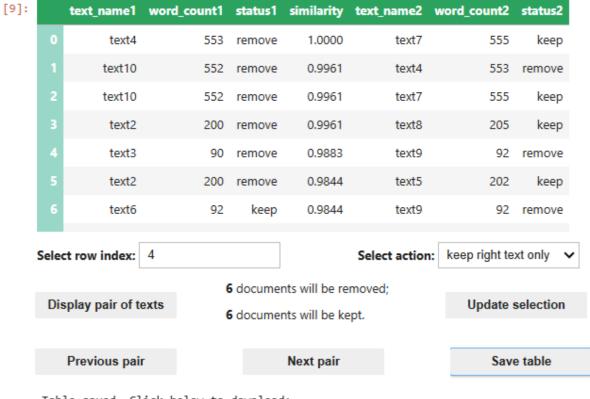


Table saved. Click below to download: deduplication\_table.csv

#### Save duplicated/non-duplicated texts

Once you are happy with the list of texts that you want to keep, you can save the non-duplicated texts (those with "keep" status) or the duplicated ones (those with "remove" status) as a zip of text (.txt) files and download them to your local computer.

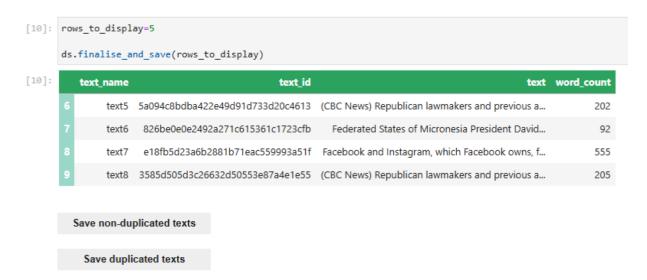
1. Execute the cell shown below to preview the texts you are keeping:

```
[]: rows_to_display=5

ds.finalise_and_save(rows_to_display)
```

You can adjust how many texts you can preview by changing the number value next to "rows\_to\_display". By default, you can view five texts (i.e., "rows\_to\_display=5").

2. A table containing the texts you are keeping (i.e., ones with a "keep" status) should appear:



3. Click on "Save non-duplicated texts" to download and save the texts you are keeping for the final version of your corpus/dataset. Click on the link to a zip folder containing all of these texts that appears to start the download to your computer:



4. Click on "Save duplicated texts" to download and save the texts you are removing from your corpus/dataset (i.e., the ones with a "remove" status). Click on the link to download a zip archive that contains all of the selected texts to your computer:



Once you're done with the notebook, make sure you shut down the kernel. As a reminder, to shut down a kernel, go to click on 'Kernel' (in the menu) then 'Shut Down Kernel' (or 'Shut Down All Kernels...').

## Citing/Referencing this Notebook

Citation: Jufri, Sony & Sun, Chao (2024). Document Similarity. v1.0 [minor update]. Australian Text Analytics Platform. Software. https://github.com/Australian-Text-Analytics-Platform/document-similarity

If you are using this notebook in your research, please also include the following statement or an appropriate variation thereof:

This study has utilised a notebook/notebooks developed for the Australian Text Analytics Platform (<a href="https://www.atap.edu.au">https://www.atap.edu.au</a>) available at <a href="https://github.com/Australian-Text-Analytics-Platform/document-similarity/">https://github.com/Australian-Text-Analytics-Platform/document-similarity/</a>.

In addition, please inform ATAP (<u>info@atap.edu.au</u>) of publications and grant applications deriving from the use of any ATAP notebooks in order to support continued funding and development of the platform.

## Acknowledgments

This Jupyter notebook and relevant python scripts were developed by the Sydney Informatics Hub (SIH) in collaboration with the Sydney Corpus Lab under the <u>Australian Text Analytics Platform program</u> and the <u>HASS Research Data Commons and Indigenous Research Capability Program</u>. These projects received investment from the Australian Research Data Commons (<u>ARDC</u>), which is funded by the National Collaborative Research Infrastructure Strategy (<u>NCRIS</u>).

The notebook incorporates MinHash, which is introduced by Andrei Z. Broder in this <u>paper</u>. Details can be found <u>here</u>.

#### **Known Issues**

The notebook has not been tested with very big data sets.