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.

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).

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 the blog post introducing this tool or are familiar with the tool, you can skip this general overview section and will find the tool explanation from here onwards.

The tool is designed to compare every pair of texts in a 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.

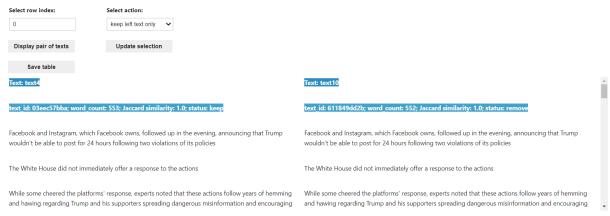


Figure 1. Viewing and comparing each pair of texts in order to adjust the action (i.e., 'keep' or 'remove')

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.

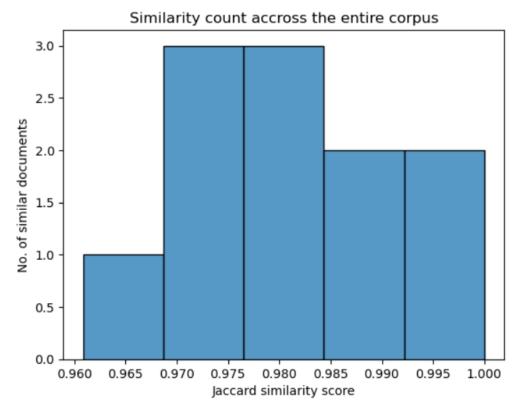


Figure 2. Histogram of the count of similar documents in the corpus found in particular Jaccard similarity score ranges.

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...

DokehJS 2.4.3 successfully loaded.

Finished loading.
```

Load the data

This notebook will allow you to upload text data in a text file (or a number of text files) or a spreadsheet.

1. Execute the cell:

```
[ ]: # upload the text files and/or excel spreadsheets onto the system
    display(ds.upload_box)
    print('Uploading large files may take a while. Please be patient.')
    print('\033[1mPlease wait and do not press any buttons until the progress bar appears...\033[0m')
```

2. Click 'Upload your files'. A window should appear prompting you to select txt files, or a single csv file, xlsx file, or zip folder.

```
[2]: # upload the text files and/or excel spreadsheets onto the system
display(ds.upload_box)
print('Uploading large files may take a while. Please be patient.')
print('\033[1mPlease wait and do not press any buttons until the progress bar appears...\033[0m')

L Upload your files (txt, csv, xlsx or zip) (0)

Uploading large files may take a while. Please be patient.
Please wait and do not press any buttons until the progress bar appears...
```

- 3. Click 'Open' after you've selected the file(s) you want to upload.
- 4. The tool should start loading the selected file(s). Once completed, you get a message saying, "Finished uploading files..." and another message saying the number of files that were uploaded (e.g., "10 text documents are loaded for tagging"):

```
[2]: # upload the text files and/or excel spreadsheets onto the system
display(ds.upload_box)
print('Uploading large files may take a while. Please be patient.')
print('\033[1mPlease wait and do not press any buttons until the progress bar appears...\033[0m')

LUpload your files (txt, csv, xlsx or zip) (0)

The total size of the upload is 0.02 MB.
Reading uploaded files...
This may take a while...

100%| 10/10 [00:00<00:00, 34017.06it/s]
Finished uploading files.
10 text documents are loaded for tagging.

rm: cannot remove './input': No such file or directory
Uploading large files may take a while. Please be patient.
Please wait and do not press any buttons until the progress bar appears...
```

5. Execute the following cell to view a snippet of the contents of the 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.



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:

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

12 pair of similar documents 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.

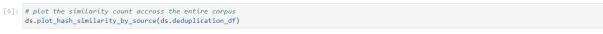
Histogram of similar documents

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.

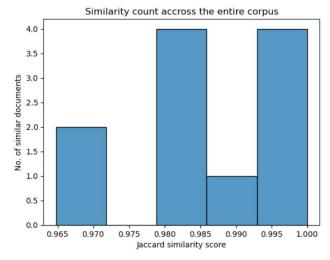
1. Execute the following cell:

```
[ ]: # 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:



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



Heatmap of similar documents

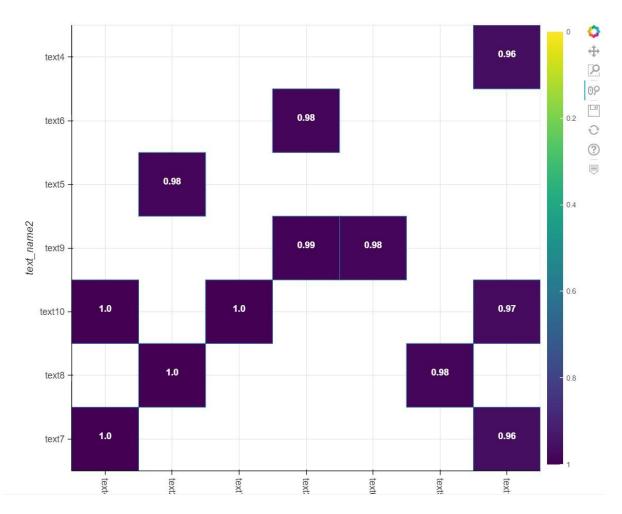
You can produce a heatmap that shows the Jaccard similarity scores between pairs of similar documents. The heatmap only displays pairs of similar documents with scores above the similarity cut-off, as defined during the similarity calculations step.

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 here 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 15th to the 45th) 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.

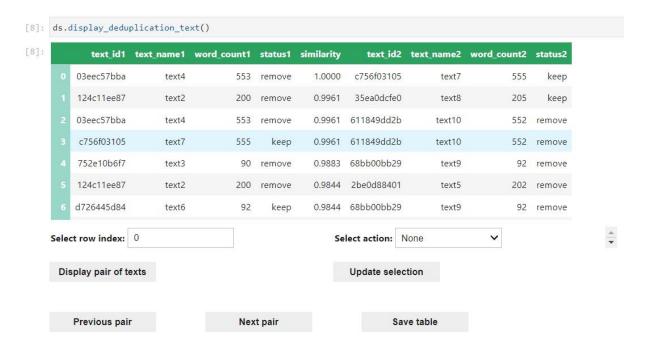
Analyse similar documents

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.

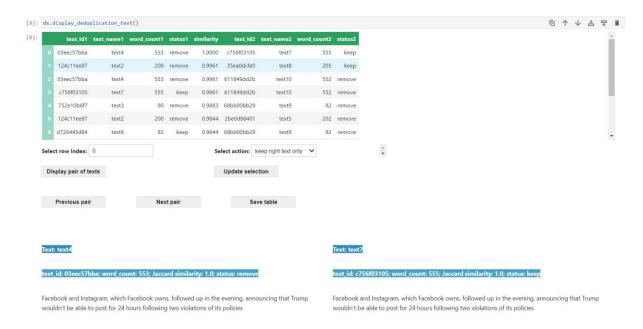
1. Execute the cell shown below:

```
[ ]: ds.display_deduplication_text()
```

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



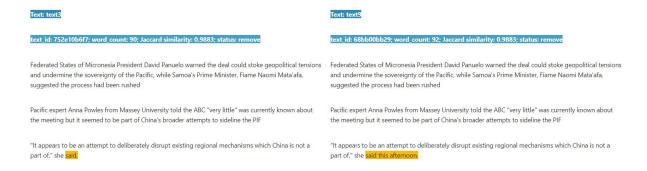
3. Click on "Display pair of texts" to view each pair of similar texts.



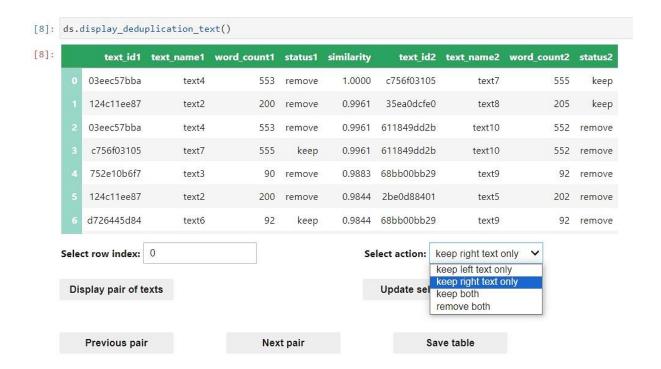
To view different pairs of similar texts, click "Previous pair" or "Next pair". To view a specific pair, type the corresponding row number (for the pair of texts you wish to view) into the box next to "Select row index".

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:

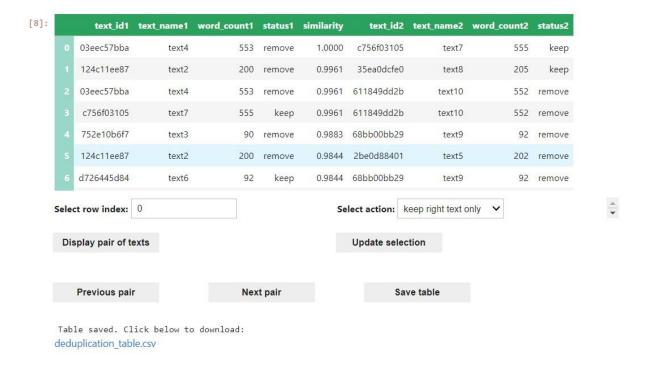


4. After viewing the similar pair of texts, click on the drop-down menu next to "Select action" to update the status (i.e., either to "keep" or "remove") for each text in the pair:



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:



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., the 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 (2022). Document Similarity. v1.0. 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 (https://www.atap.edu.au) available at https://github.com/Australian-Text-Analytics-Platform/document-similarity/.

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.