Technical Report of iZENELib

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Abstract

This document presents the technical report for the project iZENELib that could be used in the search engine developing process. iZENELib is expected to contain two parts:AM-Lib, which takes charge of storage, and IR-Lib, which takes charge of information retrieval and machine learning.

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1 Document History

Date	Author	Description		
2008-11-02	Kevin	Initialize the design issue of AM-Lib.		
2008-11-10	Yingfeng	Initialize the design issue of IR-Lib.		
2008-11-10	Yingfeng	Create the technical report.		
2008-11-21	Yingfeng	Add the design issue of Matrix Library.		
2008-12-05	Yingfeng	Adjust the milestone.		
2008-12-19	peisheng	Update KeyType, ValueType and DataType		
		description.		

2 Design Goal

iZENELib plans to provide a collection of utilities which could be used in the search engine developing process. iZENELib is expected to be composed of two parts—the part taking charge of storage(AM-Lib), and the part in charge of information retrieval and machine learning(IR-Lib). AM-Lib is expected to be composed of two sub-parts, the one which provides common utilities for data storage, and the one providing corpus data management which serves for the IR-Lib. Generic design would be adopted largely in iZENELib to provide much more flexibility for component's reusing.

3 Initial architecture design of AM-lib

The future probable usages of AM-lib can be illustrated in several ways.

• In your project, you may want to compare the performance of using several different data structures. AM-lib makes this easy anyway.

```
#include "am/am.hpp"
class MyClass {
public:
        \label{localization} \verb|MyClass(AccessMethods<int, string>* pAm): pAm_(pAm){} |
        void mvFoo()
                pAm_->insert(128, ''Hello! AM-lib'');
                pAm_->getDataBy(128);
        AccessMethods<int, string>* pAm_;
#include "myclass.hpp'
#include "am/btree.hpp'
#include "am/rtree.hpp",
#include "am/am.hpp'
int main()
        AccessMethods<int, string>* pAm = new BTree<int, string>(...);
        MyClass test1(pAm);
        test1.myFoo();
        delete pAm;
        pAm = new RTree<int, string>(...);
        MyClass test2(pAm);
        test2.myFoo();
        delete pAm;
}
```

• You can make your modules more reuseable.

• You don't need to worry about the size of data, cause AM-lib will use disk when data size comes very large.

4 Corpus Management

Corpus management component of AM-Lib provides storage services for IR-Lib. It is necessary because each component of IR-Lib will read data from corpus and output the results to a generic structs, therefore refactoring this common part into a single library will improve the system's reusage.

Existing project as *SML* provides similar components as DOCUMENTBAG, etc. We can base corpus management on SML. What's more, IR-Lib needs a powerful matrix component to store the middle temporary computation outputs and the ultimate results.

4.1 Design of Matrix Library

Matrix is one of the most important fundamental component that is required by all kinds of machine learning and information retrieval algorithms. Besides the general numeric matrix utilities, we plan to include the following characteristics:

- A general matrix that has both memory and file version.

 File version is important because of the large scale data to be dealed with.
- SVD Decomposition, QR Decomposition, LU Decomposition, Eigenvalue Decomposition

These utilities are extremly useful in machine learning and information retrieval.

• Hessian matrix

Hessian matrix is useful in Bayesian inference and decision theory.

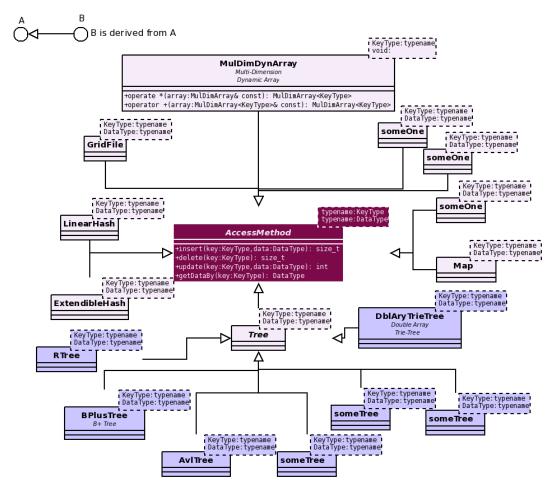


Figure 1: Initial design of AM-lib classes

Since the matrix library is required to be implemented with a modern generic design, what's more, a matrix library that provides general numeric utilities is itself a large work, therefore, we should base our implementation on the existing library, or else, the matrix library would have been a large engineering work. Taking the consideration of the file version matrix, together with the generic design, it means that the library that we choose to base on should be totally hacked, or else both of these two requirements could not be satisfied. uBlas is the matrix library included by Boost, it could be one of the choice to base on, however, it still has the following limitations:

- uBlas is frequently changed with the Boost library, since our code would be integrated with the existing library, it means that each engineer that uses different version of Boost perhaps could not get the matrix library worked, and also, whenever Boost upgraded its library(with a frequency of 2 months per time or so), we should change our matrix design to keep up with the new changes.
- According to *Ian*'s experience on *uBlas*, it still has some bugs, which leads to redesigning a basic matrix utility in *Clustering-framework*.

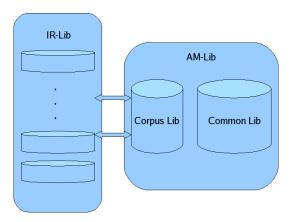


Figure 2: AM-Lib and IR-LIB

There exist two other generic matrix library— $Mtl4^1$, and $Glas^2$, which are also total generic design with a better architecture and code quality. Still, we have not decided which library would be chosen to be based on, all of these libraries have the same design idea and take time to study to be able to hack them.

As to the issue of file version of matrix library, we have got a new idea that utilizing the *mmap* system call to map the file to the process space, after this step, we could operate file the same as memory. Under 64bit mode, the size limit of the file to be mapped is large enough to satisfy all kinds of huge matrix data. Following is the sample code which is platform independent.

```
#ifndef WIN32
void* ptr = ::mmap(0, len, prot, MAP_SHARED, fd, 0);
#else
DWORD prot = 0;
HANDLE h;
void* ptr = NULL;
h = CreateFileMapping((HANDLE)_get_osfhandle(fd), 0, PAGE_READWRITE, 0, len, 0);
if (h != INVALID_HANDLE_VALUE) {
ptr = MapViewOfFile(dm_mappingobj, FILE_MAP_ALL_ACCESS, 0, 0, len);
}
#endif
#endif
```

This kind design could improve the code reuage, additionally, after the file is mapped into the process space, we can reduce the context between os kernel space and user process space, which leads to a better IO performance.

5 Components of IR-Lib

IR-Lib is a collection of algorithms in machine learning and information retrieval, together with the Corpus Management component of AM-Lib, it could provide a generic framework for search applications. Both machine learning and information retrieval have covered lots of fields, therefore, the main purpose of IR-Lib is to provide a scalable framework together with general algorithms, then in future, more advanced algorithms could be added easily.

The relationship between machine learning and information retrieval is very close and machine learning could be seen as the lower layer to provide methods for information retrieval's usage. Therefore IR-Lib could be composed of two layers. In addition, there exists some fields in information retrieval that has not adopted methods provided by machine

 $^{^{1} \}rm http://www.osl.iu.edu/research/mtl/mtl4/$

²http://www.cs.kuleuven.be/~ karlm/glas/

learning, such as recommendation systems, preprocessing, etc. We will talk about all the components of IR-Lib one by one.

6 Machine learning Components

• Supervised Learning.

Wisenut-classifier has implemented most of the basic supervised learning methods. We plan to replace the interface to SML with the interface to new corpus management component of AM-Lib, and then refactor it to the generic design.

• Unsupervised Learning.

Clustering-framework has already doen a good job of it. Therefore, the relavant job of this component is to make Clustering-framework suit for the whole framework of IR-Lib.

- Learning Complex Models.
 - 1. EM(Expectation—Maximization), which is also a basic learning approach in semisupervised learning.
 - 2. Hidden Markov Models.
 - 3. Sampling method, including MCMC.
 - 4. Graphical Models, graphical models including following directions, each of which is under hot research, we are not sure whether it is possible to implement all of them, just try to do that.
 - (a) Bayesian Network.
 - (b) Markov Random Fields.
 - (c) Conditional Random Fields.
- Dimensionality Reduction. We plan to implement PCA at first, more approaches could be done in future if possible.

In summary, machine learning are still under fast developing process, therefore only some basic directions would be included into this library, we hope a good design framework could be provided in order that more learning approaches could be included into this library easily in future.

7 Information Retrieval Components

• Text Pre-Processing

Text pre-processing techniques are mature and have been implemented by existing projects, therefore we can refactor them from existing code.

- 1. Stopword Removal
- 2. Stemming
- 3. TF-IDF
- 4. Tokenization
- 5. Feature Selection
- 6. Duplicate Detection

- Language Models
 It is necessary to refactor and integrate Jinglei's work into the library.
- Topic Modeling

 Topic modelling is a hot research direction and lots of new approaches appear continuously. We only plan to provide some topic modelling methods including LSI, LDA and 4-level PAM. We hope more topic modeling approaches could be easily added to this library.

8 Access Methods Library Design

8.1 Summery of exiting library

As Figure 3 shows, YLIB is a great work which includes 5 parts as algorithm, container, database, data processor and network. And SML focuses on how to deal with corpus and categorize. SF1Lib is a new library focuses on manipulating database. Our work is giving these library a new face using generic programming. For so many modules and classes in these library, just a few of them relates with the concept access methods. And we conclude the basic functions of AM is QUID (querying, updating, insertion and deletion). Policybased design in book 'Modern C++ Design: Generic Programming and Design Patterns Applied' gives us a very good clue to do this work.

8.2 Policy-based AM

Policy-based design treats every changeable parts as a policy and integerates all the policies in a host which is treated as an interface for application developers and coordinates all the policies to give the functions. What a user of policy-based designed library need to know is what kind of policy he wants to use and where's the host class. Thus, what are the changeable parts of AM-Lib? They are the place to store the data, main memory or disk, if data stored on disk, the type of cache used, and data type, key type, and the container with different algorithms. We can divide access methods and data structure into two parts. One is some kind of easy data structure without specific algorithms like vector, list etc. The other is some complex structure like tree and table with some certain algorithm. The design of these two parts should be different but their interface to the client should be the same. The simple data structure could be like follow.

```
template<typename KeyType, typename ValueType,
    typename LockType=NullLock, typename Alloc=std::allocator<DataType<KeyType,ValueType> > >
class AccessMethod
{
    public:
    virtual bool insert(const KeyType& key, const ValueType& value);

    virtual bool insert(const DataType<KeyType,ValueType>& data) = 0;

    virtual bool update(const KeyType& key, const ValueType& value);

    virtual bool update(const DataType<KeyType,ValueType& value);

    virtual ValueType* find(const KeyType& key) = 0;

    virtual bool del(const KeyType& key) = 0;

};

template<typename KeyType, typename LockType=NullLock,typename Alloc=std::allocator<DataType<KeyType> >> class UnaryAccessMethod
{
    public:
    virtual bool insert(const KeyType& key);
```

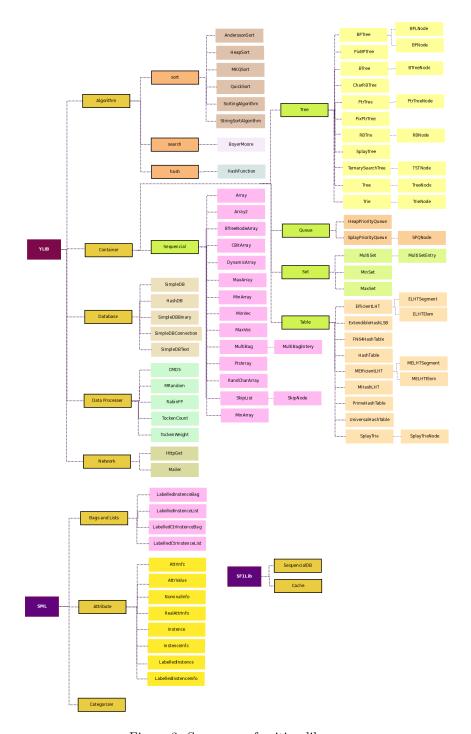


Figure 3: Summery of exiting library

```
virtual bool insert(const DataType<KeyType>& data) = 0;
virtual bool update(const KeyType& key);
virtual bool update(const DataType<KeyType>& data) = 0;
```

```
virtual KeyType* find(const KeyType& key) = 0;
virtual bool del(const KeyType& key) = 0;
}:
```

All binary components of AM-LIB should implement the interface of AccessMethod while all unary components should implement the interface of , where LockType is the thread policy which allows for different threading model to be applied, Alloc is the memory policy, which we could choose to store elements in memory or file. The elements of the AM-LIB are **DataType**, which contains **KeyType** and **ValueType**, when **ValueType** is **NullType**(defined below), it is unary.

DataType provide get_key(), get_value(), serialize(), and compare() method.

```
struct NullType{
//When ValueType is NullType, it is equivatent to unary DataType.
template<typename KeyType, typename ValueType=NullType>
class DataType
public:
DataType(){
    DataType(const KeyType& key, const ValueType& value)
    :key(key), value(value)
    int compare(const DataType& other) const
        return _compare(other, static_cast<boost::is_arithmetic<KeyType>*>(0));
    template < class Archive>
    void serialize(Archive& ar, const unsigned int version)
        ar & kev:
        ar & value;
    const KeyType& get_key() const {return key;}
    const ValueType& get_value() const {return value;}
private:
    int _compare(const DataType& other, const boost::mpl::true_*) const
    {
        return key-other.key;
    int _compare(const DataType& other, const boost::mpl::false_*) const
        BOOST_CONCEPT_ASSERT((KeyTypeConcept<KeyType>));
        return key.compare(other.key);
public:
    KeyType key;
    ValueType value;
template<typename KeyType>
class DataType<KeyType, NullType>
public:
DataType(){
    DataType(const KeyType& key)
    :key(key)
    DataType(const KeyType& key, const NullType&)
    :key(key)
```

```
}
    int compare(const DataType& other) const
        return _compare(other, static_cast<boost::is_arithmetic<KeyType>*>(0));
    template<class Archive>
    void serialize(Archive& ar, const unsigned int version)
        ar & key;
    }
    const KeyType& get_key() const {return key;}
private:
    int _compare(const DataType& other, const boost::mpl::true_*) const
    {
        return key-other.key;
    }
        _compare(const DataType& other, const boost::mpl::false_*) const
        BOOST_CONCEPT_ASSERT((KeyTypeConcept<KeyType>));
        return key.compare(other.key);
public:
    KeyType key;
};
```

As for meta type **keyType** like int, float that don't have **compare()** method, a default CompareFunctor is also provided.

```
template<class KeyType>
class CompareFunctor:public binary_function<KeyType, KeyType, int>

{
    public:
    int operator()(const KeyType& key1, const KeyType& key2) const
    {
        return _compare(key1, key2, static_cast<boost::is_arithmetic<KeyType>*>(0));
    }
    private:
        int _compare(const KeyType& key1, const KeyType& key2, const boost::mpl::true_*) const
        {
            return key1 - key2;
        }
        int _compare(const KeyType& key1, const KeyType& key2, const boost::mpl::false_*) const
        {
            BOOST_CONCEPT_ASSERT((KeyTypeConcept<KeyType>));
            return key1.compare(key2);
        }
};
```

All components of AM-LIB share the same definition of element—DataType.

Some kind of complex DSs (data structures) are different. The data manipulated by these DSs are composited of key and data. They have their own algorithms for sorting and searching. And for some complex situations, the key could be multiple.

8.3 Storage Manager

8.3.1 Memory Management

Most of the C++ programmers do not benefit from 'Garbage Collection' technique (GC). They are sick of deleting objects but have to do this. There are some C/C++ memory GC implementations, but they are complex and are not widely used. Although we have smart pointer which is based on 'Reference Counting', it is not always a good idea however:

- It's a fact that not all of the C++ programmers like smart pointers, and not all of the C++ programmers like the SAME smart pointer. You have to convert between normal pointers and smart pointers, or between one smart pointer and another smart pointer. Then things become complex and difficult to control.
- Having a risk of Circular Reference.
- Tracking down memory leaks is more difficult

Therefore it is recommended to introduce the *GCAllocator* included by *StdExt* when allocating small objects. The detailed design and usage of *GCAllocator* could be got from another document—*GCAllocator.pdf*, written by *Xushiwei*—author of *GCAllocator*. It has been improved and some bugs have been fixed, locating at *izenelib/include/3rdparty/boost/memory*.

8.3.2 File Management

Since there might be lots of data structures that are required to provide a file based version to make data persistent, it is reasonable to provide a good file management mechanism to accelerate the development of file based version. *iZENELib* has provided two kinds of utilities to satisfy this requirement.

BlockManager STXXL is an extremely high efficient file based container, where there exists a file block manager inside, together with an asynchronous I/O layer(AIO). The purpose of the AIO layer is to provide a unified approach to asynchronous I/O. The layer hides details of native asynchronous I/O interfaces of an operating system and has the following advantages:

- 1. To issue read and write requests without having to wait for them to be completed.
- 2. To wait for the completion of a subset of issued I/O requests.

- 3. To wait for the completion of at least one request from a subset of issued I/O requests.
- 4. To poll the completion status of any I/O request.
- 5. To assign a callback function to an I/O request which is called upon I/O completion (asynchronous notification of completion status), with the ability to co-relate callback events with the issued I/O requests.

STXXL has a high performance on disk I/O, its I/O counterpart has been extracted independently to the BlockManager in iZENELib. However, it has the limitation of being able to process data with fixed length only. BlockManager is just a file block manager, with a LRU cache policy inside and an AIO layer, if it was adopted, still lots of work are needed, such as, how to manage data location, how to design cache, etc., however, these works are relevant to different application, which can not be easily abstracted to a common utility.

File Based Allocator Another policy of file management is to provide a file based allocator, having the same interface as such memory allocators as std::allocator, therefore, if an application is designed based on allocators, the according file based version is very easy to implement—just replace the original temlate parameter having value of std::allocator with the file based allocator. The only available mechanism of implementing such an allocator is to recur to a function provided by operating system—file mapping.Both UNIX like operating system and Windows have provided such an ability, with mmap for the former, OpenFileMapping for the latter. Under 32bit environment, there exists a limitation that only 2G bytes could be mapped into the virtual memory address at one time, therefore, for larger file, it is inconvenient to manage larger file. Under 64bit environment, such a limitation has been trivial because the virtual memory address is large enough. We have two choices for such kind of file based allocator—the one provided by Boost and the one provided by IIII because the former as the example:

```
#include <boost/interprocess/containers/list.hpp>
#include <boost/interprocess/managed_mapped_file.hpp>
#include <boost/interprocess/allocators/allocator.hpp>
using namespace boost::interprocess;
typedef list<int. allocator<int. managed mapped file::segment manager> > MvList:
int main ()
   const char *FileName
                              = "file_mapping";
   const std::size_t FileSize = 10000;
   std::remove(FileName):
   managed_mapped_file mfile_memory(open_or_create, FileName, FileSize);
   MyList * mylist = mfile_memory.construct<MyList>("MyList")(mfile_memory.get_segment_manager());
   //Obtain handle, that identifies the list in the buffer
   managed_mapped_file::handle_t list_handle = mfile_memory.get_handle_from_address(mylist);
   //Fill list until there is no more room in the file
   try{
     while(1) {
         mylist->insert(mylist->begin(), 0);
   }
   catch(const bad_alloc &){
      //mapped file is full
   //Let's obtain the size of the list
  std::size_t old_size = mylist->size();
   //To make the list bigger, let's increase the mapped file
   //in FileSize bytes more.
   mfile_memory.grow(FileName,FileSize);
   //If mapping address has changed, the old pointer is invalid,
   //so use previously obtained handle to find the new pointer.
           static_cast<MyList *>(mfile_memory.get_address_from_handle(list_handle));
   //Fill list until there is no more room in the file
```

```
while(1) {
    mylist->insert(mylist->begin(), 0);
    }
} catch(const bad_alloc &){
    //mapped file is full
}
//Let's obtain the new size of the list
std::size_t new_size = mylist->size();
assert(new_size > old_size);
//Destroy list
std::cout<<"old size "<<old_size<<std::endl;
mfile_memory.destroy_ptr(mylist);
return 0;
}</pre>
```

As shown above, file mapper in Boost is not so convenient because the length of the file has to be sure at first, and if the file space has been exhaust, the programmer has to increase the file mapping size manually. The essential design aim of the utility provided by Boost is to satisfy the inter process communication, therefore, the designer has not considered much about how to apply file mapping to storage design, that is why iZENELib still provides another implementation. With this implementation, the file could grow its size automatically, and a file space garbage collection is also provided. It is extremely easy to use, for example:

```
template<class T>
class vector : public std::vector<T, izenelib::am::allocator<T> >{};
```

With the above codes, we then have a file based vector, which has the same usage as *std::vector*. What's more, according to the benchmark testing, the file based container can perform even faster then its according memory version, following is the bench result between file mapping and *STL* containers given a data set with 1000000 items:

	Insert	Sequential Read	Random Read	Delete
filemapper	1710ms	1310ms	$1870 \mathrm{ms}$	780ms
std containerr 1660m		$1300 \mathrm{ms}$	1910ms	790ms

iZENELib has also provided the *new* and *delete* operation to construct and destroy the object within the file space.

8.4 Minimal Perfect Hashing

Minimal perfect hashing (MPH) could be divided into two categories—order-preserving and non order-preserving. Order-preserving is more useful in information retrieval, however, more research results have been got on non order-preserving solutions. Both of the MPH would be added into iZENELib. Like B-Tree component, MPH also provides an iterator for sequential access.

9 Utility components

9.1 iZeneLib Log

Part of making them easier to develop/maintain is to do logging. Logging allows you to later see what happened in your application. It can be a great help when debugging and/or testing it. The great thing about logging is that you can use it on systems in production and/or in use - if an error occurs, by examining the log, you can get a picture of where the problem is. Good logging is mandatory in support projects, you simply can't live without it. Used properly, logging is a very powerful tool. Besides aiding debugging/testing, it can also show you how your application is used (which modules, etc.), how time-consuming certain parts of your program are, how much bandwidth your application consumes, etc. - it's up to you how much information you log, and where.Here, we describe what this log can do and

how to use the izenelib log. This log is based on boost logging. So, you can use it coupled with boost logging. Let's see an example as follow.

```
18:59.24 [dbg] this is so cool
18:59.24 [dbg] this is so cool again
18:59.24 [app] hello, world
18:59.24 [app] good to be back;)
18:59.24 [err] it's an error here
```

Level There're three levels, debug/application/error infomation. Their formats are just like above. You can use some maroc like follow to output three different infomation. If you want to disable any kind of log informatin, just define some switch like DBG_DISABLE/ APP_DISABLE/ ERR_DISABLE.

```
LDBG_≪"Output debug information!";
LERR_≪"Output error information!";
LAPP-≪"Output application information!";
```

Tags The defualt tags for three different information is just like [dbg]/[app]/[err]. If you don't like them, you can define them. Respectively, you can define DBG_TAG/APP_TAG/ ERR_TAG to specify the tags.

Destination As defualt, all the three kind information will be ouputed into three files, "'dbg.txt"/ "'app.txt"/ "'err.txt". The file names are defined by DBG_LOG_NAME/APP_LOG_NAME/ ERR_LOG_NAME. Of course, you can output all the information into one file. All of thoes information will not be printed onto console. If you want to do it, you just need to define some switchs as DBG2CONSOLE/APP2CONSOLE/ERR2CONSOLE.

Conditional log Sometime, you want to log according some condition while the program is running. You can do it like:

```
IF\_DLOG(i\%10==0) \ll "i \mod 10 \text{ is } 0!";
```

It's outputed as debug information. You can use other kind of log with $IF_ALOG()/IF_ELOG()$.

Initialize log This is a kind of globle log within one program. You just need to initialize it in your main() function like this: $USING_IZENE_LOG()$;. Every time when you need to use log, don't forget to include the head file "util/log.h".

10 Appendix

	Table 1: Implement schedule					
	Miles-tone	Start	Finish		Description	Status
1	Preparation for $iZENELib$	2008- 11-01	2008- 12-05	Yingfeng, Kevin	Study the generic design idea, refactor $YLib$, find solutions for important utilities including matrix, file block manager.	Finished
2	AM Interface Definition	2008- 12-08	2008- 12-12	Yingfeng, Peisheng, Kevin	Make sure the policy based AM interface	Finished
3	Encapsulation for basic AM methods	2008- 11-01	2008- 12-31	Kevin,	Encapsulate Linear hash table memory version, skip list memory version, etc.	Memory versions done
				Peisheng	Encapsulate sequencial DB, B-tree, skip list file version, etc.	Btree and SDB based on izenelib are fin- ished and their effi- ciecy doen't decline.
			_	Liang	Encapsulate Priority Queue, etc.	In progress
				Vernkin	Encapsulate Perfect hash, etc.	In progress
4	Storage manager	2008- 12-08	2008- 12-24	Yingfeng	An extremely efficient memory allocator together with a file block allocator should be provided, the former could improve memory version of AM methods remarkably and the latter could support file based data structure with high scalability and high performance	Finished
5	Matrix library	2008-	2009-	Yingfeng	An efficient matrix library is pro-	Todo
6	Basic IR Library	12-25 2009- 01-14	01-14 2009- 01-31	Yingfeng	vided Basic IR-Lib could be provided, including corpus management, ba- sic supervised and unsupervised learning	Todo
7	Pre-Processing	2009- 01-01	2009- 01-15	Kevin	Text pre-processing component is encapsulated.	Todo
8	Complex machine learning	2009- 02-01	2009- 02-28	Yingfeng	Learning methods for complex models have been added.	Todo
9	Network Library	2009- 03-01	2009- 03-31	Yingfeng	Distributed computing component is added.	Todo