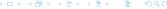
Where's Waldo? - Text Search and Pattern Matching in PostgreSQL

Joe Conway joe.conway@crunchydata.com mail@joeconway.com

Crunchy Data

October 28, 2015





Where's Waldo?

- Many potential methods
- Usually best to use simplest method that fits use case
- Might need to combine more than one method





Agenda

- Summary of methods
- Overview by method
- Example use cases





Caveats

- Full text search could easily fill a tutorial
 - ⇒ this talk provides overview
- Even other methods cannot be covered exhaustively
 - ⇒ this talk provides overview
- citext not covered, should be considered





Text Search Methods

- Standard Pattern Matching
 - LIKE operator
 - SIMILAR TO operator
 - POSIX-style regular expressions
- PostgreSQL extensions
 - fuzzystrmatch
 - Soundex
 - Levenshtein
 - Metaphone
 - Double Metaphone
 - pg_trgm
- Full Text Search





Sample Data

```
CREATE TABLE messages (
    [...]
    _from text NOT NULL,
    _to text NOT NULL,
    subject text NOT NULL,
    bodytxt text NOT NULL,
    fti tsvector NOT NULL,
    [...]
);
select count(1) from messages;
  count
 1086568
(1 row)
```





LIKE Syntax

- Expression returns TRUE if string matches pattern
- Typically string comes from relation in FROM clause
- Used as predicate in the WHERE clause to filter returned rows
- LIKE is case sensitive
- ILIKE is case insensitive

```
string LIKE pattern [ESCAPE escape-character]
string ~~ pattern [ESCAPE escape-character]
string ILIKE pattern [ESCAPE escape-character]
string ~~* pattern [ESCAPE escape-character]
lower(string) LIKE pattern [ESCAPE escape-character]
```





Negating LIKE

- To negate match, use the NOT keyword
- Appropriate operator also works

```
string NOT LIKE pattern [ESCAPE escape-character]
string !~~ pattern [ESCAPE escape-character]
string NOT ILIKE pattern [ESCAPE escape-character]
string !~~* pattern [ESCAPE escape-character]
NOT (string LIKE pattern [ESCAPE escape-character])
NOT (string ILIKE pattern [ESCAPE escape-character])
```





Wildcards

- Pattern can contain wildcard characters
 - Underscore ("_") matches any single character
 - Percent sign ("%") matches zero or more characters
- With no wildcards expression equivalent to equals
- To match literal wildcard chars, they must be escaped
- Default escape char is backslash ("\")
 - May be changed using ESCAPE clause
 - Match the literal escape char by doubling up





Alternate Index Op Classes

- varchar_pattern_ops, text_pattern_ops and bpchar_pattern_ops
- Useful for anchored pattern matching, e.g. "<pattern>%"
- Used by LIKE, SIMILAR TO, or POSIX regex when not using "C" locale
- Also create "normal" index for queries with <, <=, >, or >=
- Does NOT work for ILIKE or ~~*
 - Expression index over lower(column)
 - pg_trgm index operator class





LIKE Operator SIMILAR TO Operator POSIX-style Regular Expressions Fuzzy Full Text Search

ESCAPE Example

```
SELECT 'A\b\C_%_dEf' LIKE 'A\b\C#_#%#_d%' ESCAPE '#';
?column?
-----
t
(1 row)
```

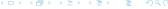


SIMILAR TO Syntax

- Equivalent to LIKE
- Interprets pattern using SQL definition of regex

string SIMILAR TO pattern [ESCAPE escape-character] string NOT SIMILAR TO pattern [ESCAPE escape-character]





Wildcards

- Same as LIKE
- Also supports meta-characters borrowed from POSIX REs
 - pipe (" | "): either of two alternatives
 - asterisk ("*"): repetition >= 0 times
 - plus ("+"): repetition >= 1 time
 - question mark ("?"): repetition 0 or 1 time
 - "{m}": repetition exactly m times
 - "{m,}": repetition >= m times
 - "{m,n}": repetition >= m and <= n times</p>
 - parentheses ("()"): group items into a single logical item





SIMILAR TO Examples

```
SELECT 'AbCdef' SIMILAR TO 'AbC%' AS true,
    'AbCdef' SIMILAR TO 'Ab(C|c)%' AS true,
    'Abcccdef' SIMILAR TO 'Abc{4}%' AS false,
    'Abcccdef' SIMILAR TO 'Abc{3}%' AS true,
    'Abccdef' SIMILAR TO 'Abc?d?%' AS true;
    true | true | false | true | true
    t | t | f | t | t
(1 row)
```



Regular Expression Syntax

- Similar to LIKE and ILIKE
- Allowed to match anywhere within string
 ⇒ unless RE is explicitly anchored
- Interprets pattern using POSIX definition of regex

```
string ~ pattern -- matches RE, case sensitive
string ~* pattern -- matches RE, case insensitive
string !~ pattern -- not matches RE, case sensitive
string !~* pattern -- not matches RE, case insensitive
```





Regular Expression Syntax

- POSIX-style REs complex enough to deserve own talk
- See: www.postgresql.org/docs/9.5/static/functions-matching.html#FUNCTIONS-POSIX-REGEXP





Regular Expression Example

Really slow without an index

```
EXPLAIN ANALYZE SELECT date FROM messages

WHERE bodytxt ** 'multixact';

QUERY PLAN

Seq Scan on messages

(cost=0.00..197436.10 rows=108 width=8)

(actual time=6.435..26851.944 rows=2580 loops=1)

Filter: (bodytxt ** 'multixact'::text)

Rows Removed by Filter: 1083988

Planning time: 1.682 ms

Execution time: 26852.410 ms
```





Regular Expression Example

Use trigram GIN index

```
CREATE INDEX trgm_gin_bodytxt_idx
ON messages USING gin (bodytxt using gin_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE bodytxt ~* 'multixact';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on trgm_gin_bodytxt_idx
         (cost=0.00..124.81 rows=108 width=0)
         (actual time=66.095..66.095 rows=2581 loops=1)
         Index Cond: (bodytxt ~* 'multixact'::text)
 Planning time: 3.680 ms
 Execution time: 192.912 ms
```



LIKE Operator SIMILAR TO Operator POSIX-style Regular Expressions Fuzzy Full Text Search

Regular Expression Example

• Or use trigram GiST index ...oops

```
CREATE INDEX trgm_gist_bodytxt_idx
ON messages USING gist (bodytxt using gist_trgm_ops);
ERROR: index row requires 8672 bytes, maximum size is 8191
```



Regular Expression Compared to FTS

For the sake of comparison - with full text search

```
EXPLAIN ANALYZE SELECT date FROM messages

WHERE fti @@ 'multixact:D';

QUERY PLAN

Bitmap Heap Scan on messages

[...]

-> Bitmap Index Scan on messages_fti_idx

(cost=0.00..64.75 rows=5433 width=0)

(actual time=1.085..1.085 rows=1475 loops=1)

Index Cond: (fti @@ '''multixact'':D'::tsquery)

Planning time: 0.504 ms

Execution time: 22.054 ms
```





Soundex

- soundex: converts string to four character code
- difference: converts two strings, reports # matching positions
- Generally finds similarity of English names
- Part of fuzzystrmatch extension





Levenshtein

- Calculates Levenshtein distance between two strings
- Comparisons case sensitive
- Strings non-null, maximum 255 bytes
- Part of fuzzystrmatch extension





Metaphone

- Constructs code for an input string
- Comparisons case in-sensitive
- Strings non-null, maximum 255 bytes
- max_output_length arg sets max length of code
- Part of fuzzystrmatch extension





Double Metaphone

- Computes primary and alternate codes for string
- Non-English names especially, can be different
- Comparisons case in-sensitive
- No length limit on the input strings
- Part of fuzzystrmatch extension





Trigram Matching

- Functions and operators for determining similarity
- Trigram is group of three consecutive characters from string
- Similarity of two strings count number of trigrams shared
- Index operator classes supporting fast similar strings search
- Support indexed searches for LIKE and ILIKE queries
- Comparisons case in-sensitive
- Part of pg_trgm extension





Trigram Matching Example

```
\timing
SELECT set_limit(0.6); -- defaults to 0.3
SELECT DISTINCT _from, -- uses trgm_gist_idx
similarity(_from, 'Josef Konway <mail@joeconway.com>') AS sml
FROM messages WHERE _from % 'Josef Konway <mail@joeconway.com>'
ORDER BY sml DESC, _from;
```

_from	1	sml
Joseph Conway <mail@joeconway.com> Joe Conway <mail@joeconway.com> jconway <mail@joeconway.com> "Joe Conway" <joe.conway@mail.com></joe.conway@mail.com></mail@joeconway.com></mail@joeconway.com></mail@joeconway.com>	 	0.703704 0.678571
(4 rows)		

Time: 502.002 ms



Overview

- Searches documents with potentially complex criteria
- Superior to other methods in many cases because:
 - Offers linguistic support for derived words
 - Ignores stop words
 - Ranks results by relevance
 - Very flexibly uses indexes
- Topic very complex see:

```
http://www.postgresql.org/docs/9.5/static/textsearch.html
http://www.postgresql.org/docs/9.5/static/datatype-textsearch.html
http://www.postgresql.org/docs/9.5/static/functions-textsearch.html
http://www.postgresql.org/docs/9.5/static/textsearch-indexes.html
```





LIKE Operator SIMILAR TO Operator POSIX-style Regular Expression: Fuzzy Full Text Search

Preprocessing

- Convert text to tsvector
- Store tsvector
- Index tsvector

```
CREATE FUNCTION messages_fti_trigger_func()
RETURNS trigger LANGUAGE plpgsql AS $$
BEGIN NEW.fti =
    setweight(to_tsvector(coalesce(NEW.subject, '')), 'A') ||
    setweight(to_tsvector(coalesce(NEW.bodytxt, '')), 'D');
RETURN NEW; END $$;

CREATE TRIGGER messages_fti_trigger BEFORE INSERT OR UPDATE
OF subject, bodytxt ON messages FOR EACH ROW
EXECUTE PROCEDURE messages_fti_trigger_func();
```



CREATE INDEX messages_fti_idx ON messages USING gin (fti);

Weighting

- Weights used in relevance ranking
- Array specifies how heavily to weigh each category
- {D-weight, C-weight, B-weight, A-weight}
- defaults: {0.1, 0.2, 0.4, 1.0}



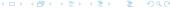


LIKE Operator SIMILAR TO Operator POSIX-style Regular Expressions Fuzzy Full Text Search

Creating tsvector

- Parse into tokens
 - Classes of tokens can be processed differently
 - Postgres has standard parser and predefined set of classes
 - Custom parsers can be created
- Convert tokens into lexemes
 - Dictionaries used for this step
 - ⇒ standard dictionaries provided
 - ⇒ custom ones can be created
 - Normalized: different forms of same word made alike
 - ⇒ fold upper-case letters to lower-case
 - ⇒ removal of suffixes
 - ⇒ elimination of stop words





Writing tsquery

- The pattern to be matched
- Lexemes combined with boolean operators
 - & (AND)
 - | (OR)
 - ! (NOT)
- ! (NOT) binds most tightly& (AND) binds more tightly than | (OR)
- Parentheses used to enforce grouping
- Label with * to specify prefix matching
- Supports weight labels





Writing tsquery

- to_tsquery() to create
- Can also cast to tsquery
 - simple strings only
 - no boolean operators, weight labels, or prefix-match labels



Writing tsquery

- Alternative function plainto_tsquery()
 - Simple strings only
 - No boolean operators, No weight labels, No prefix-match labels
 - Text parsed and normalized
 - & (AND) operator inserted between surviving words





Match Operator

- Text search match operator @@
- Returns true if tsvector (preprocessed document) matches tsquery (search pattern)
- Either maybe be written first





Relevance Ranking

- ts_rank(): based on frequency of matching lexemes
- ts_rank_cd(): lexeme proximity taken into consideration

```
WITH ts(q) AS
  SELECT 'multixact: A & (crash:D | (data:D & loss:D))'::tsquery
SELECT ts_rank(m.fti, ts.q) as tsrank
FROM messages m, ts
WHERE m.fti @@ ts.q
ORDER BY tsrank DESC LIMIT 4:
  tsrank
 0.999997
0.999997
 0.999997
 0.999997
```



Highlighting

- ts_headline(): returns excerpt with query terms highlighted
- Apply in an outer query, after inner query LIMIT
 ⇒ avoids ts_headline() overhead on eliminated rows

Pattern Matching: Example Use Cases

- Equal
- Anchored
- Anchored case-insensitive
- Reverse Anchored case-insensitive
- Unanchored case-insensitive
- Fuzzy
- Complex Search with Relevancy Ranking





Equal

- Find all the rows where column matches '<pattern>'
- Equal operator with suitable index is best
- Without an index

```
EXPLAIN ANALYZE SELECT date FROM messages

WHERE _from = 'Joseph Conway <mail@joeconway.com>';

QUERY PLAN

Seq Scan on messages
(cost=0.00..197436.10 rows=61 width=8)
(actual time=49.192..527.343 rows=14 loops=1)
Filter: (_from = 'Joseph Conway <mail@joeconway.com>'::text)
Rows Removed by Filter: 1086554
Planning time: 0.256 ms
Execution time: 527.386 ms
```

Equal

With an index

```
CREATE INDEX from_idx ON messages(_from);

EXPLAIN ANALYZE SELECT date FROM messages

WHERE _from = 'Joseph Conway <mail@joeconway.com>';

QUERY PLAN

Bitmap Heap Scan on messages

[...]

-> Bitmap Index Scan on from_idx

(cost=0.00..4.88 rows=61 width=0)

(actual time=0.051..0.051 rows=14 loops=1)

Index Cond: (_from = 'Joseph Conway <mail@joeconway.com>'::text)

Planning time: 0.267 ms

Execution time: 0.161 ms
```

Anchored

- Find all the rows where column matches '<pattern>%'
- LIKE operator with suitable index is best
- This index does not do the job

```
CREATE INDEX from_idx ON messages(_from);

EXPLAIN ANALYZE SELECT date FROM messages

WHERE _from LIKE 'Joseph Conway%';

QUERY PLAN

Seq Scan on messages

(cost=0.00..197436.10 rows=62 width=8)
(actual time=52.991..536.316 rows=14 loops=1)
Filter: (_from ~~ 'Joseph Conway%'::text)
Rows Removed by Filter: 1086554
Planning time: 0.264 ms
Execution time: 536.362 ms
```

Anchored

Note text_pattern_ops - this works

```
CREATE INDEX pattern_idx ON messages(_from using text_pattern_ops);

EXPLAIN ANALYZE SELECT date FROM messages

WHERE _from LIKE 'Joseph Conway%';

QUERY PLAN

Index Scan using pattern_idx on messages

(cost=0.43..8.45 rows=62 width=8)

(actual time=0.043..0.082 rows=14 loops=1)

Index Cond: ((_from ~>= 'Joseph Conway'::text)

AND (_from ~< 'Joseph Conway'::text))

Filter: (_from ~ 'Joseph Conway'::text))

Planning time: 0.490 ms

Execution time: 0.133 ms
```



Anchored Case-Insensitive

- Find all the rows where column matches '<pattern>%'
 - ⇒ but in Case-Insensitive way
- LIKE operator with suitable expression index is good

```
CREATE INDEX lower_pattern_idx
ON messages(lower(_from) using text_pattern_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE lower(_from) LIKE 'joseph conway%';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on lower_pattern_idx
         (cost=0.00..214.76 rows=5433 width=0)
         (actual time=0.074..0.074 rows=14 loops=1)
         Index Cond: ((lower(_from) ~>=~ 'joseph conway'::text)
                 AND (lower(_from) ~<~ 'joseph conwaz'::text))
 Planning time: 0.505 ms
 Execution time: 0.258 ms
```

Anchored Case-Insensitive

Can also use trigram GIN index with ILIKE

```
CREATE EXTENSION pg_trgm;
CREATE INDEX trgm_gin_idx
ON messages USING gin (_from using gin_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE _from ILIKE 'joseph conway%';
          QUERY PLAN
 Bitmap Heap Scan on messages
   Γ...
   -> Bitmap Index Scan on trgm_gin_idx
         (cost=0.00..176.46 rows=62 width=0)
         (actual time=92.980..92.980 rows=155 loops=1)
         Index Cond: (_from ~* 'joseph conway%'::text)
 Planning time: 0.857 ms
 Execution time: 93.473 ms
```



Anchored Case-Insensitive

Or a trigram GiST index with ILIKE

```
CREATE INDEX trgm_gist_idx
ON messages USING gist (_from using gist_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE _from ILIKE 'joseph conway%';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on trgm_gist_idx
         (cost=0.00..8.88 rows=62 width=0)
         (actual time=53.080..53.080 rows=155 loops=1)
         Index Cond: (_from ~* 'joseph conway%'::text)
 Planning time: 1.068 ms
 Execution time: 53.604 ms
```



Reverse Anchored Case-Insensitive

- Find all the rows where column matches '%<pattern>'
 - ⇒ but in Case-Insensitive way
- LIKE operator with suitable expression index is good

```
CREATE INDEX rev_lower_pattern_idx

ON messages(lower(reverse(_from)) using text_pattern_ops);

EXPLAIN ANALYZE SELECT date FROM messages WHERE lower(reverse(_from))

LIKE reverse('%joeconway.com>');

QUERY PLAN

Bitmap Heap Scan on messages [...]

-> Bitmap Index Scan on rev_lower_pattern_idx

(cost=0.00..214.76 rows=5433 width=0)

(actual time=1.357..1.357 rows=2749 loops=1)

Index Cond: ((lower(reverse(_from)) ~>= '>moc.yawnoceoj'::text)

AND (lower(reverse(_from)) ~>= '>moc.yawnoceok'::text))

Planning time: 0.278 ms

Execution time: 17.491 ms
```

Reverse Anchored Case-Insensitive

Can also use trigram GIN index with ILIKE

```
CREATE INDEX trgm_gin_idx
ON messages USING gin (_from using gin_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE _from ILIKE '%joeconway.com>';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on trgm_gin_idx
         (cost=0.00..177.58 \text{ rows}=2344 \text{ width}=0)
         (actual time=80.537..80.537 rows=2749 loops=1)
         Index Cond: (_from ~~* '%joeconway.com>'::text)
 Planning time: 0.915 ms
 Execution time: 88.723 ms
```



Reverse Anchored Case-Insensitive

Or a trigram GiST index with ILIKE

```
CREATE INDEX trgm_gist_idx
ON messages USING gist (_from using gist_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE _from ILIKE '%joeconway.com>';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on trgm_gist_idx
         (cost=0.00..193.99 rows=2344 width=0)
         (actual time=58.386..58.386 rows=2749 loops=1)
         Index Cond: (_from ~~* '%joeconway.com>'::text)
 Planning time: 0.921 ms
 Execution time: 66.771 ms
```



Unanchored Case-Insensitive

- Find all the rows where column matches '%<pattern>%'
 ⇒ but in Case-Insensitive way
- This cannot use expression or pattern_ops index 🙂

```
EXPLAIN ANALYZE SELECT date FROM messages

WHERE _from ILIKE '%Conway%';

QUERY PLAN

Seq Scan on messages

(cost=0.00..197436.10 rows=5096 width=8)

(actual time=2.242..2002.998 rows=7402 loops=1)

Filter: (_from ~~* '%Conway%'::text)

Rows Removed by Filter: 1079166

Planning time: 0.860 ms

Execution time: 2003.667 ms
```

Unanchored Case-Insensitive

Use trigram GIN index with ILIKE

```
CREATE INDEX trgm_gin_idx
ON messages USING gin (_from using gin_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE _from ILIKE '%Conway%';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on trgm_gin_idx
         (cost=0.00..94.22 rows=5096 width=0)
         (actual time=9.060..9.060 rows=7402 loops=1)
         Index Cond: (_from ~* '%Conway%'::text)
 Planning time: 0.915 ms
 Execution time: 30.567 ms
```



Unanchored Case-Insensitive

Or a trigram GiST index with ILIKE

```
CREATE INDEX trgm_gist_idx
ON messages USING gist (_from using gist_trgm_ops);
EXPLAIN ANALYZE SELECT date FROM messages
                WHERE _from ILIKE '%Conway%';
          QUERY PLAN
 Bitmap Heap Scan on messages
   [...]
   -> Bitmap Index Scan on trgm_gist_idx
         (cost=0.00..422.63 rows=5096 width=0)
         (actual time=128.881..128.881 rows=7402 loops=1)
         Index Cond: (_from ~* '%Conway%'::text)
 Planning time: 0.871 ms
 Execution time: 149.755 ms
```



Fuzzy

- Find all the rows where column matches '<pattern>'
 - ⇒ but in an inexact way
- Use dmetaphone function with an expression index
- Might also use Soundex, Levenshtein, Metaphone, or pg_trgm

Complex Requirements

- Full Text Search
 - Complex multi-word searching
 - Relevancy Ranking

```
EXPLAIN ANALYZE SELECT date FROM messages
WHERE fti @@ 'bug:A & deadlock:D & startup:D';

QUERY PLAN

Bitmap Heap Scan on messages
[...]

-> Bitmap Index Scan on messages_fti_idx

(cost=0.00..52.02 rows=2 width=0)

(actual time=9.261..9.261 rows=93 loops=1)

Index Cond: (fti @@ '''bug'':A & ''deadlock'':D &

''startup'':D'::tsquery)

Planning time: 0.469 ms

Execution time: 12.614 ms
```



Questions?

Thank You! mail@joeconway.com



