Text Technologies in the Mainstream: Text Analytics Solutions, Applications, and Trends

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> > INFORMS 2008 June 15, 2008

### Introduction

### Seth Grimes -

Principal Consultant with Alta Plana Corporation.

Contributing Editor, IntelligentEnterprise.com. Channel Expert (text analytics), B-Eye-Network.com. Founding Chair, Text Analytics Summit, textanalyticsnews.com. Instructor, The Data Warehousing Institute, tdwi.org.

What is Analytics?

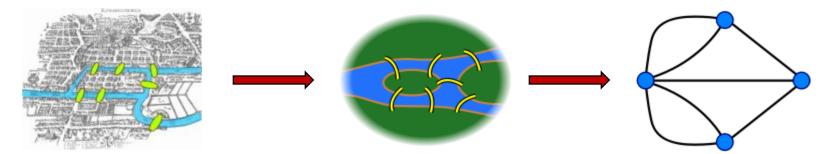


$$x(t) = t$$
  

$$y(t) = \frac{1}{2} a (e^{t/a} + e^{-t/a})$$
  

$$= a \cosh(t/a)$$

http://www.tropicalisland.de/NYC\_New\_York\_Brooklyn\_Bridge\_from\_ World\_Trade\_Center\_b.jpg

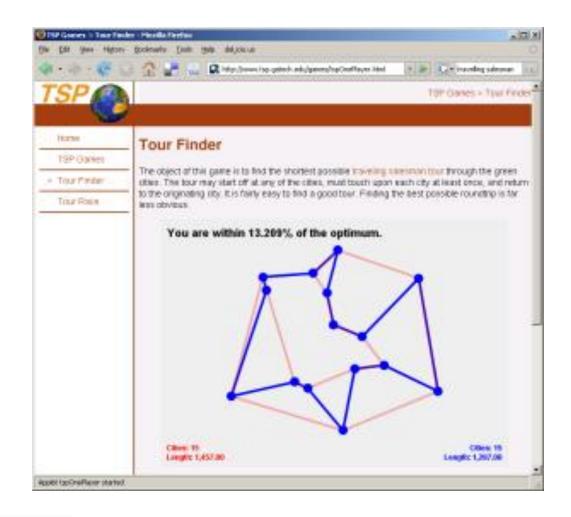


http://en.wikipedia.org/wiki/Seven\_Bridges\_of\_K%C3%B6nigsberg



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# What do you do when you're working with this?

"SUMLEV", "STATE", "COUNTY", "STNAME", "CTYNAME", "YEAR", "POPESTIMATE", 50,19,1, "Iowa", "Adair County", 1,8243,4036,4207,446,225,221,994,509 50,19,1, "Iowa", "Adair County", 2,8243,4036,4207,446,225,221,994,509 50,19,1, "Iowa", "Adair County", 3,8212,4020,4192,442,222,220,987,505 50,19,1, "Iowa", "Adair County", 4,8095,3967,4128,432,208,224,935,488 50,19,1, "Iowa", "Adair County", 5,8003,3924,4079,405,186,219,928,495 50,19,1, "Iowa", "Adair County", 6,7961,3892,4069,384,183,201,907,472 50,19,1, "Iowa", "Adair County", 7,7875,3855,4020,366,179,187,871,454 50,19,1, "Iowa", "Adair County", 8,7795,3817,3978,343,162,181,841,439 50,19,1, "Iowa", "Adair County", 9,7714,3777,3937,338,159,179,805,417

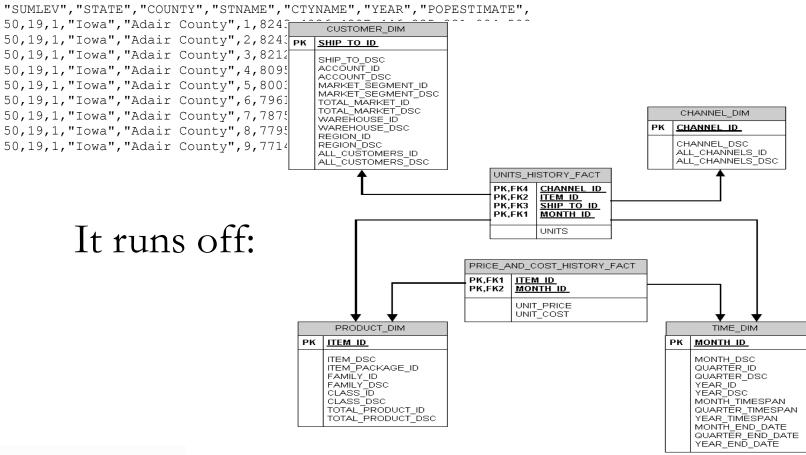
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# **Business Intelligence**

### Traditional BI feeds off:



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# **Business Intelligence**

### Traditional BI produces:

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120101				SVP Strategic Development SVP Partnerships			\$367,415	\$392,100	\$24,68
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				WW Operatio	ns		\$476,000	\$725,887	\$249,8
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P Actual He Region -All Regions	Department -All Departments Executive Management Finance Human Resource Marketing & Communication Product Development Professional Services Sales +All Departments +All Departments	Positions +All Positions	<ul> <li>Actual</li> <li>143,639,982,00</li> <li>6,299,022,00</li> <li>12,224,220,00</li> <li>13,075,463,00</li> <li>13,910,753,00</li> <li>10,644,102,00</li> <li>76,317,649,00</li> <li>11,168,773,00</li> <li>37,893,162,00</li> <li>35,248,940,00</li> </ul>	<ul> <li>Budget</li> <li>143, 199, 389, 00</li> <li>6, 494, 166, 00</li> <li>12, 087, 406, 00</li> <li>12, 989, 344, 00</li> <li>13, 770, 267, 00</li> <li>10, 786, 611, 00</li> <li>76, 098, 206, 00</li> <li>10, 973, 392, 00</li> <li>38, 397, 600, 00</li> </ul>	Variance     -440,593.00     195,144.00     -136,814.00     -61,122.00     -140,486.00     142,509.00     -219,443.00     -195,381.00     238,921.00	<ul> <li>Variance Perce</li> <li>- 33</li> <li>- 33</li> <li>- 33</li> <li>- 133</li> <li>- 66</li> <li>- 102</li> <li>- 102</li> <li>- 120</li> <li>- 120</li></ul>			

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http://www.pentaho.com/products/dashboards/

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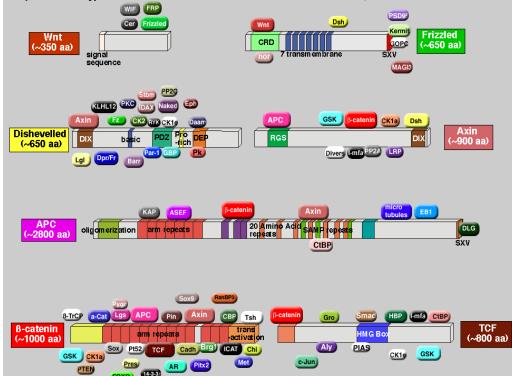
# Business Intelligence

- "The bulk of information value is perceived as coming from data in relational tables. The reason is that data that is structured is easy to mine and analyze."
  - Prabhakar Raghavan, Yahoo Research, former CTO of enterprise-search vendor Verity (now part of Autonomy)
- That's where BI operates, on data in a relational table that originated in transactional systems.
- Yet it's a truism that 80% of enterprise information is in "unstructured" form. Alta Plana Octoporation, 2008 INFORMS 2008

# The "Unstructured Data" Challenge

#### April 2006, Roel Nusse

These diagrams display interactions between proteins in Wnt signaling and the approximate sites of binding. The partners are <u>hyper-linked</u> to one literature reference in PubMed. From there, one can retrieve more literature.



www.stanford.edu/%7ernusse/wntwindow.html

### Axin and Frat1 interact with dvl and GSK, bridging Dvl to GSK in Wnt-mediated regulation of LEF-1.

What proteins transduce their signals through dishevelled (Dvl) proteins to inhibit glycogen synthase kinase 3beta (GSK), leading to the accumulation of cytosolic beta-catenin and activation of TCF/LEF-1 transcription factors. To understand the mechanism by which Dvl acts through GSK to regulate LEF-1, we investigated the roles of Axin and Frat1 in Wnt-mediated activation of LEF-1 in mammalian cells. We found that Dvl interacts with Axin and with Frat1, both of which interact with GSK. Similarly, the Frat1 homolog GBP binds Xenopus Dishevelled in an interaction that requires GSK. We also found that Dvl, Axin and GSK can form a ternary complex bridged by Axin, and that Frat1 can be recruited into this complex probably by Dyl. The observation that the Dyl-binding domain of either Frat1 or Axin was able to inhibit Wnt-1-induced LEF-1 activation suggests that the interactions between DvI and Axin and between Dyl and Frat may be important for this signaling pathway. Furthermore, Wnt-1 appeared to promote the disintegration of the Frat1-DvI-GSK-Axin complex, resulting in the dissociation of GSK from Axin. Thus, formation of the quaternary complex may be an important step in Wnt signaling, by which Dvl recruits Frat1, leading to Frat1-mediated dissociation of GSK from Axin.

www.ncbi.nlm.nih.gov/entrez/query.fcgi?db=PubMed&cmd= Retrieve&list\_uids=10428961&dopt=Abstract

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# Text (and Media) Technologies

What do people do with electronic documents?

- 1. Publish, Manage, and Archive.
- 2. Index and Search.
- 3. Categorize and Classify according to *metadata* & contents.
- 4. Information Extraction.

For textual documents, text analytics enhances #2 and enables #3 & #4.

Text analytics (a.k.a. text data mining) can be automated or interactive.

# The "Unstructured Data" Challenge

Consider:

- E-mail, news & blog articles, forum postings, and other social media.
- Contact-center notes and transcripts; recorded conversation.

Surveys, feedback forms, warranty claims.

And every other sort of document imaginable.

These sources may contain "traditional" data.

The Dow fell 46.58, or 0.42 percent, to 11,002.14. The Standard & Poor's 500 index fell 1.44, or 0.11 percent, to 1,263.85, and the Nasdaq composite gained 6.84, or 0.32 percent, to 2,162.78.

Search

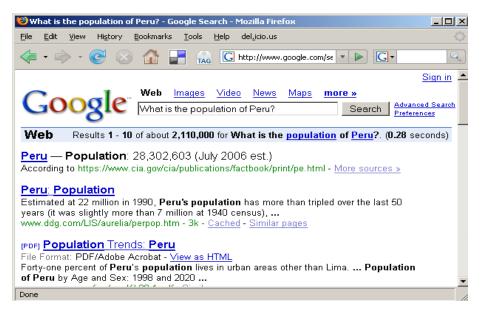
Search is typically answer #1. Search involves –
Words & phrases: search terms & natural language.
Qualifiers: include/exclude, and/or, not, etc.
Search is not enough.

Search helps you find things you already know about. It doesn't help you discover things you're unaware of.
Search results often lack relevance.
Search finds documents, not knowledge.

Search doesn't enable **unified analytics** that links data from textual and transactional sources. Alta Plana Octoporation, 2008 INFORMS 2008

### Search++

# Text analytics enables results that suit the information and the user, e.g., answers –



### Now on to knowledge discovery, to discerning *interrelationships of presented facts*... Alta Plana <sup>CAlta Plana</sup> INFORMS 2008

Search can be pretty smart.

This slide and the next show dynamic, clustered search results from Grokker...

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Hide Tools	Text Analytics Summit (5) Enterprise Search (4) IBM Research (4) IBM Systems Journal (4) Inxight Software (4) Marketing Research and Web (4) Natural Language (4) PRESS RELEASE (4) Provides Free (4) Coreference (3) Engineering News (3) Open Source (3) Bessentiates (4)	Source: Wikipedia         Text Mining, Text Analysis, Unstructured Data, Document Classification, Customer Chum Add to Workina List   Post to del.icio.us   Bookmark   Email         Specializing in text analysis, unstructured data, document classification and Read about other how organizations use Predictive Text Analytics here. 

live.grokker.com/grokker.html?query=text%20analytics&Yahoo=true&Wikipedia=true&numResults=250

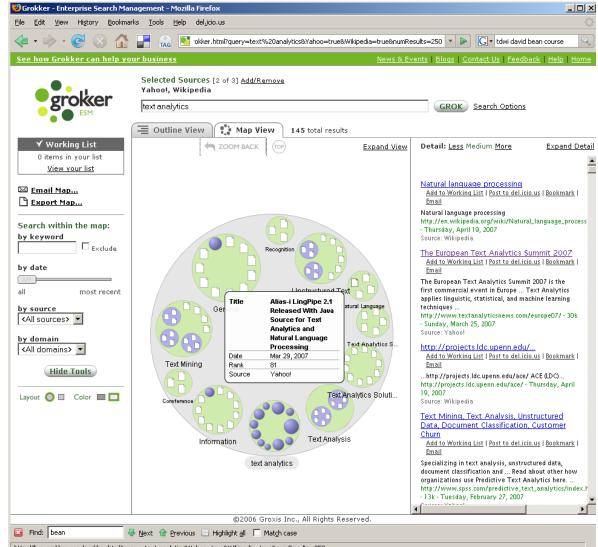
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...with a zoomable display.

Clustering here utilizes statistical (text) data mining techniques to identifying cohesive groupings of retrieved documents.



http://live.grokker.com/grokker.html?query=text analytics&Yahoo=true&Wikipedia=true&numResults=250

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#### **INFORMS 2008**

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### Text analytics can do better.

- Text analytics extracts and classifies by -
  - Entities: names, e-mail addresses, phone numbers
  - Concepts: abstractions of entities.
  - Facts and relationships.
  - Abstract attributes, e.g., "expensive," "comfortable"
  - Opinions, sentiments: attitudinal data.
  - ... and sometimes data objects.

### Text Analytics

### Text Mining = Data Mining of textual sources.

Clustering and classification.

Link Analysis.

Prediction.

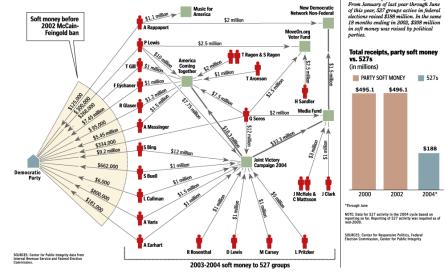
Association rules.

Regression.

Forecasting.

#### Soft Money Game

Democrats initially ran into difficulty getting corporate chieflatins and their companies to donate soft money to their sphart 527 groups, America Coming Together, The Media Park and their fundraising arm, the Joint YCAroy Campaign 2004, Pandraisers turned to manerick donors, many of whom had given soft money to the Democratic Party in the past. This chart shows most donations and transfers of more than \$\$ million to Democratic 527 strongch 5ex1.30.



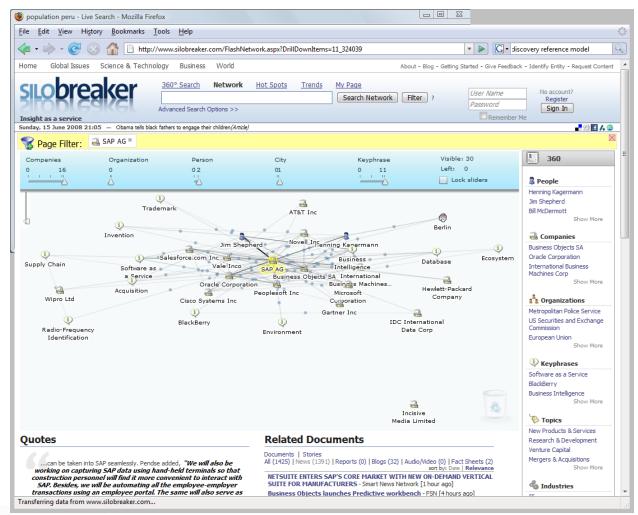
Text Mining = Knowledge Discovery in Text.

Search (Information Retrieval) is a first step. Alta Plana Orporation, 2008 INFORMS 2008

intributions to 527s activ

elections have not kept pace with soft money donations to national party committees in previous election cycle

# Visualizing Interrelationships





## Text Analytics

### Typical steps in text analytics include –

Retrieve documents for analysis.

Apply statistical &/ linguistic &/ structural techniques to **identify, tag, and extract** entities, concepts, relationships, and events (features) within document sets.

Apply statistical pattern-matching & similarity techniques to **classify** documents and organize extracted features according to a specified or generated categorization / taxonomy.

- via a *pipeline* of statistical & linguistic steps.

## Text Analytics

Text analytics discerns linguistic and statistical structure inherent in the textual source materials. Let's look at some of the steps.

First, we'll do a lexical analysis of a text file, essentially a basic statistical analysis of the words and multi-word terms, looking at an article I wrote on sentiment analysis...

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44 unique word:		ort words inc	luded				
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sentiment	18 L,I	1.26%	46.93	for	17 L	1.19%	34,44
that	15	1.05%	55.22	text	15 L	1.05%	58.77
analytics	12 L	0.84%	52.83	from	10	0.70%	71.16
management	9 H	0.63%	50.37	analysis	9 L.I	0.63%	50.61
our	8	0.56%	20.36	are	8	0.56%	56.38
influence	7 H	0.49%	78.46	customer	7 H	0.49%	33.75
which	6	0.42%	63.18	understanding	6	0.42%	47.34
she	6	0.42%	68.22	notes	6	0.42%	51.18
have	6	0.42%	35.14	can	6	0.42%	55.43
been	6	0.42%	28.93	understand	5	0.35%	57.77
they	5	0.35%	54.28	sources	5	0.35%	87.31
not	5	0.35%	37.68	more	5	0.35%	42.90
mining	5	0.35%	55.84	mail	5	0.35%	63.50
extraction	5	0.35%	40.15	enterprise	5 H	0.35%	40.59
way	4	0.28%	23.61	time	4	0.28%	20.59
take	4	0.28%	14.78	surveys	4 L	0.28%	50.39
support	4	0.28%	21.75	results	4	0.28%	38.58
	4	0.28%	39.97	positive	4	0.28%	56.36
potential	4	0.20%0	00.01			012010	00100



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Phrase repeats							
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Repeats : 246				phrase	· · · · · · · · · · · · · · · · · · ·	density Pro	
phrase	repeats	density	Prominence	customer experience management	ЗН	0.63 %	52.99
text analytics	9	1.26 %	58.87	enterprise feedback management	ЗН	0.63 %	52,73
of the	6	0.84 %	46.49	of text analytics	3	0.63 %	46.78
and the	4	0.56 %	48.45	analytics can be	2	0.42 %	97.15
e mail	4	0.56 %	62.86	analyze attitudinal information	2	0.42 %	96.66
from sources	4	0.56 %	88.12	and analyze attitudinal	2	0.42 %	96.73
influence networks	4 н	0.56 %	76.00	and survey responses	2	0.42 %	95.54
notes and	4	0.56 %	52,11	applied to extract	2	0.42 %	96.94
of text	4	0.56 %	52.37	articles blog postings	2	0.42 %	96.10
to the	4	0.56 %	60.17	as articles blog	2	0.42 %	96.17
to understand	4	0.56 %	63.55	as varied as	2	0.42 %	96.31
by the	3	0.42 %	34.65	attitudinal information from	2	0.42 %	96.59
call center	3	0.42 %	68.96	be applied to	2	0.42 %	97.01
can be	3	0.42 %	81.68	blog postings e	2	0.42 %	96.03
customer experience	Зн	0.42 %	52.99	call center notes	2	0.42 %	95.75
enterprise feedback	Зн	0.42 %	52,73	can be applied	2	0.42 %	97.08
experience	зн	0.42 %	52.92	center notes and	2	0.42 %	95.68
management	0.0	0.40.0/	50.66	ceo of text	2	0.42 %	55.24
feedback management	Зн	0.42 %	52.66	cries for help	2	0.42 %	7.70
in the	3	0.42 %	41.79	e mail call	2	0.42 %	95.89
of opinion	3	0.42 %	69.97	experience management	2 н	በ.42 %	62.65
real time	3	0.42 %	17.01	enterprise			
seek to	3	0.42 %	28.58	extract and analyze	2	0.42 %	96.80
sentiment analysis	3 L,I	0.42 %	69.52	focus on applications	2	0.42 %	97.96
sentiment extraction	3	0.42 %	37.29	from linguamatics to	2	0.42 %	81.52
the results	3	0.42 %	33.45	from sources as	2	0.42 %	96.45
triggered by	3	0.42 %	26.00	information from sources	2	0.42 %	96.52
a decision	2	0.28 %	20.41	mail call center	2	0.42 %	95.82
a new	2	0.28 %	65.21	management enterprise feedback	2 н	0.42 %	62.58
analytics can	2	0.28 %	97.15	notes and survey	2	0.42 %	95.61
analytics vendor	2	0.28 %	55.02	of opinion leadership	2	0.42 %	80.43
analyze attitudinal	2	0.28 %	96.66	online consumer forums	2	0.42 %	55.90
and analyze	2	0.28 %	96.73	postings e mail	2	0.42 %	95.96







## Text Analytics

# Those "tri-grams" are pretty good at describing the *Whatness* of the source text.

- Shallow parsing and statistical analysis can be enough, for instance, to support classification.
- It can help you get at meaning, for instance, by studying cooccurrence of terms.

But statistical pattern matching alone – the bag of words approach in a vector-space model – may fall short.

# The Need for Linguistics

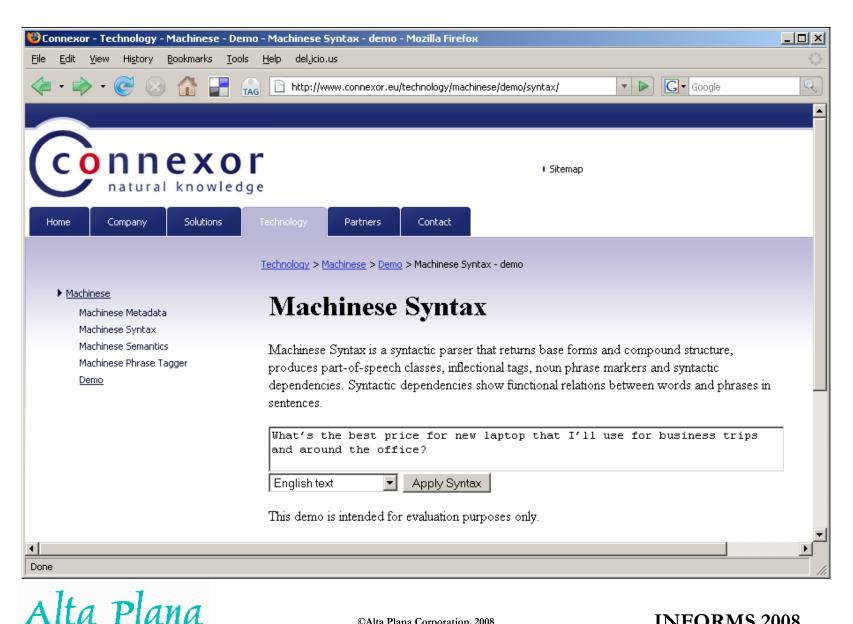
### Consider –

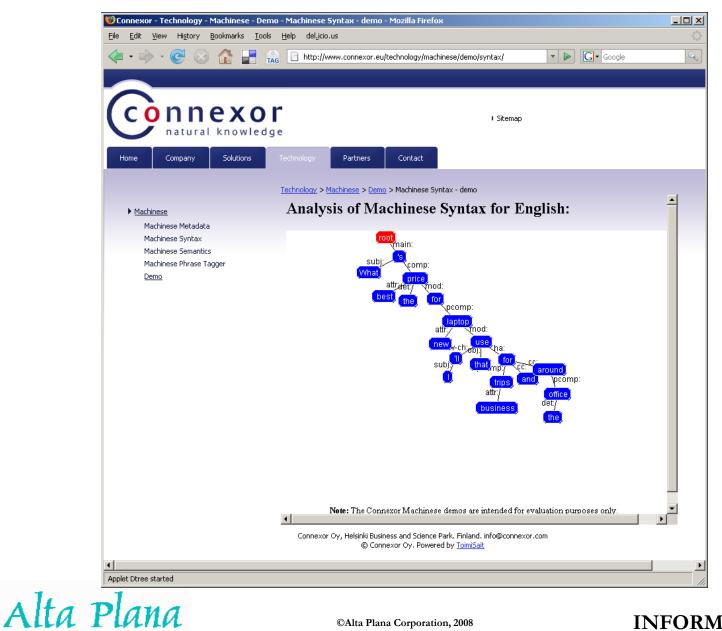
The Dow *fell* 46.58, or 0.42 percent, to 11,002.14. The Standard & Poor's 500 index fell 1.44, or 0.11 percent, to 1,263.85, and the Nasdaq composite *gained* 6.84, or 0.32 percent, to 2,162.78.

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Example from Luca Scagliarini, Expert System.

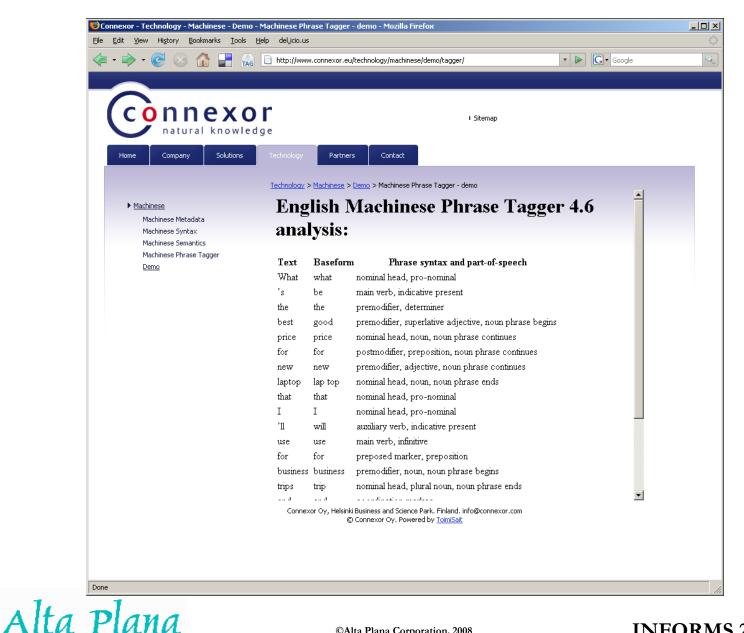
Let's try syntactic analysis of a bit of text...





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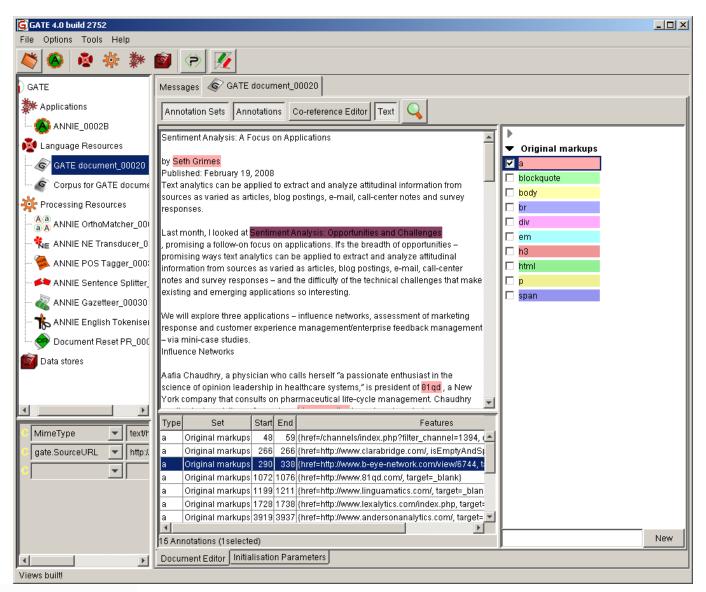


### Information Extraction

# Let's see tagging in action. We'll use GATE, an open-source tool...





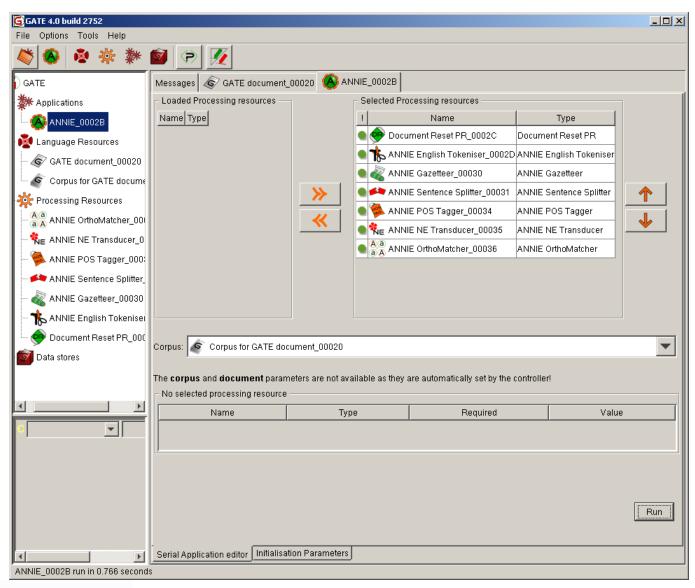


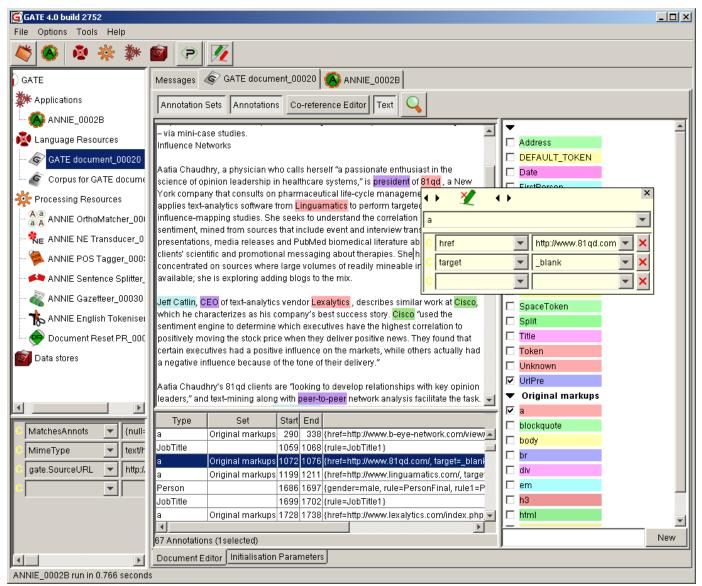
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## Information Extraction

# For content analysis, key in on extracting information to databases.

- Entities and concepts (features) are like dimensions in a standard BI model. Both classes of object are hierarchically organized and have attributes.
- We can have both discovered and predetermined classifications (taxonomies) of text features.
- Once you've done information extraction, you can mine the data and create predictive models.

# Applications

### Text analytics has applications in –

- Intelligence & law enforcement.
- Life sciences.
- Media & publishing including social-media analysis and contextual advertizing.
- Competitive intelligence.
- Voice of the Customer: CRM, product management & marketing.
- Legal, tax & regulatory (LTR) including compliance. Recruiting.

# Questions? Discussion?

### Thanks!

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