# Package 'fedmatch'

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Description Provides a flexible set of tools for matching two un-linked data sets.  'fedmatch' allows for three ways to match data: exact matches, fuzzy matches, and multivariable matches.  It also allows an easy combination of these three matches via the tier matching function.
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# Description

Data.frame with common articles

# Usage

articles

# **Format**

An object of class data.table (inherits from data.frame) with 23 rows and 2 columns.

# See Also

clean\_strings

build\_clean\_settings 3

# Description

build\_clean\_settings is a convenient way to make the proper list for the clean\_settings argument of tier\_match.

# Usage

```
build_clean_settings(
   sp_char_words = fedmatch::sp_char_words,
   common_words = NULL,
   remove_char = NULL,
   remove_words = FALSE,
   stem = FALSE
)
```

# **Arguments**

sp_char_words	character vector. Data.frame where first column is special characters and second column is full words. The default is
common_words	data.frame. Data.frame where first column is abbreviations and second column is full words.
remove_char	character vector. string of specific characters (for example, "letters") to be removed
remove_words	logical. If TRUE, removes all abbreviations and replacement words in common_words
stem	logical. If TRUE, words are stemmed

#### Value

list with settings to pass to clean\_strings

build_corpus Calculate word corpus for weighted jaccard matching	
--	--

# Description

Calculate word corpus for weighted jaccard matching

# Usage

```
build_corpus(namelist1, namelist2)
```

#### **Arguments**

```
namelist1 character vector of names from dataset 1
namelist2 character vector of names from dataset 2
```

#### Value

a data.table with columns for frequency, inverse frequency, and log inverse frequency for each word in the two strings.

```
build_fuzzy_settings Build settings for fuzzy matching
```

# Description

build\_fuzzy\_settings is a convenient way to build the list for the fuzzy settings argument in merge\_plus

# Usage

```
build_fuzzy_settings(
  method = "jw",
  p = 0.1,
  maxDist = 0.05,
  matchNA = FALSE,
  nthread = getOption("sd_num_thread")
)
```

# **Arguments**

method	character vector of length 1. Either one of the methods listed in stringdist::amatch, or our custom method 'wgt_jaccard.' See the vignettes for more details.
p	numeric vector of length 1. See stringdist::amatch()
maxDist	numeric vector of length 1. See stringdist::amatch()
matchNA	whether or not to match on NAs, see stringdist::amatch()
nthread	number of threads to use in the underlying C code.

#### Value

a list containing options for the 'fuzzy\_settings' argument of merge\_plus.

build\_multivar\_settings 5

```
build_multivar_settings
```

Build settings for multivar matching

# Description

build\_multivar\_settings is a convenient way to build the list for the multivar settings argument in merge\_plus

# Usage

```
build_multivar_settings(
  logit = NULL,
  missing = FALSE,
  wgts = NULL,
  compare_type = "diff",
  blocks = NULL,
  blocks.x = NULL,
  blocks.y = NULL,
  top = 1,
  threshold = NULL,
  nthread = 1
)
```

# **Arguments**

logit	a glm or lm model as a result from a logit regression on a verified dataset. See details.
missing	boolean T/F, whether or not to treat missing (NA) observations as its own binary column for each column in by. See details.
wgts	rather than a lm model, you can supply weights to calculate matchscore. Can be weights from calculate_weights.
compare_type	a vector with the same length as "by" that describes how to compare the variables. Options are "in", "indicator", "substr", "difference", "ratio", and "stringdist". See X for details.
blocks	variable present in both data sets to "block" on before computing scores. Match- scores will only be computed for observations that share a block. See details.
blocks.x	name of blocking variables in x. cannot supply both blocks and blocks.x
blocks.y	name of blocking variables in y. cannot supply both blocks and blocks.y
top	integer. Number of matches to return for each observation.
threshold	numeric. Minimum score for a match to be included in the result.
nthread	$integer. \ Number of cores to use when computing all combinations. \ See {\tt parallel::makecluster()}$

# Value

a list containing options for the 'multivar\_settings' argument of merge\_plus.

6 build\_tier

```
build_score_settings Build settings for scoring
```

#### **Description**

build\_score\_settings is a convenient way to make the proper list for the score\_settings argument of merge\_plus Each vector in build\_score\_settings should be the same length, and each position (first, second, third, etc.) corresponds to one variable to score on.

# Usage

```
build_score_settings(
  score_var_x = NULL,
  score_var_both = NULL,
  wgts = NULL,
  score_type
)
```

#### **Arguments**

```
score_var_x character vector. the variables from the 'x' dataset to score on
score_var_y character vector. the variables from the 'y' dataset to score on
score_var_both the variables from both datasets (shared names) to score on, before any prefixes are applied.

wgts numeric vector. The weights for the linear sum of scores
score_type character vector.
```

# Value

a list containing options for the 'score\_settings' argument of merge\_plus.

build\_tier Build settings for a tier

# **Description**

build\_tier\_settings is a convenient way to make the proper list for the tier\_list argument of tier\_match Each vector in build\_score\_settings should be the same length, and each position (first, second, third, etc.) corresponds to one variable to score on.

build\_tier 7

#### Usage

```
build_tier(
  by.x = NULL,
  by.y = NULL,
  check_merge = NULL,
  match_type = NULL,
  fuzzy_settings = build_fuzzy_settings(),
  score_settings = NULL,
  filter = NULL,
  filter.args = NULL,
  evaluate = NULL,
  evaluate.args = NULL,
  clean_settings = build_clean_settings(),
  clean = NULL,
  sequential_words = NULL,
  allow.cartesian = FALSE,
 multivar_settings = build_multivar_settings()
)
```

# **Arguments**

by.x character string. Variable to merge on in data1. See merge by.y character string. Variable to merge on in data2. See merge check\_merge logical. Checks that your unique\_keys are indeed unique.

match\_type string. If 'exact', match is exact, if 'fuzzy', match is fuzzy. If 'multivar,' match

is multivar-based. See multivar\_match,

fuzzy\_settings additional arguments for amatch, to be used if match\_type = 'fuzzy'. Suggested

defaults provided. (see amatch, method='jw')

score\_settings list. Score settings for post-hoc matchscores.

filter function or numeric. Filters a merged data1-data2 dataset. If a function, should

take in a data.frame (data1 and data2 merged by name1 and name2) and spit out a trimmed verion of the data.frame (fewer rows). Think of this function as applying other conditions to matches, other than a match by name. The first argument of filter should be the data.frame. If numeric, will drop all observations

with a matchscore lower than or equal to filter.

filter.args list. Arguments passed to filter, if a function

evaluate Function to evalute merge\_plus output.

evaluate.args list. Arguments passed to evaluate

clean\_settings list. Settings for string cleaning. See clean\_strings and build\_clean\_settings.

clean Boolean, T/F, whether or not to clean strings prior to the match.

sequential\_words

data.table of words in the same format of the common\_words argument in clean\_strings.

Each of these will be replaced from the by columns.

allow.cartesian

whether or not to allow many-many matches, see data.table::merge()

8 calculate\_weights

```
multivar_settings
```

list of settings to go to the multivar match if match\_type == 'multivar'. See multivar-match.

#### Value

a list containing 1 tier for the 'tier\_list' argument of tier\_match.

calculate\_weights

Calculate weights for computing matchscore

# Description

Calculate weights for comparison variables based on m and u probabilities estimated from a verified dataset.

# Usage

```
calculate_weights(
  data,
  variables,
  compare_type = "stringdist",
  suffixes = c("_1", "_2"),
  non_negative = FALSE
)
```

#### **Arguments**

data.frame. Verified data. Should have all of the variables you want to calculate data weights for from both datasets, named the same with data-specific suffixes. variables character vector of the variable names of the variables you want to calculate weights for. compare\_type character vector. One of 'stringdist' (for string variables) 'ratio', 'difference' (for numerics) 'indicator' (0-1 dummy indicating if the two are the same), 'in' (0-1 dummy indicating if data1 is IN data2), and 'substr' (numeric indicating how many digits are the same.) suffixes character vector. Suffixes of of the variables that indicate what data they are from. Default is same as the default for base R merge, c('.x','.y') logical. Do you want to allow negative weights? non\_negative

#### **Details**

This function uses the classic Record Linkage methodology first developed by Felligi and Sunter. See Record Linkage. m is the probability of a given link between observations is a true match, while

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u is the probability of an unlinked pair of observations being a true match. calculate\_weights computes a preliminary weight for each variable by computing

$$w = \log_2(\frac{m}{u}),$$

then making these weights sum to 1. Thus, the weights that have higher m and lower u probabilities will get higher weights, which makes sense given the definitions. These weights can then be easily passed into the score\_settings argument of merge\_plus or tier\_match, or into the wgts argument of multivar\_match.

#### Value

list with m probabilities, u probabilities, w weights, and settings, the list argument required as an input for score\_settings in merge\_plus using the calculate weights.

clean\_strings

String cleaning for easier matching

#### **Description**

clean\_strings takes a string vector and cleans it according to user-given options.

#### Usage

```
clean_strings(
   string,
   sp_char_words = fedmatch::sp_char_words,
   common_words = NULL,
   remove_char = NULL,
   remove_words = FALSE,
   stem = FALSE
)
```

#### **Arguments**

string	character or character vector of strings
sp_char_words	character vector. Data.frame where first column is special characters and second column is full words. The default is
common_words	data.frame. Data.frame where first column is abbreviations and second column is full words.
remove_char	character vector. string of specific characters (for example, "letters") to be removed
remove_words	logical. If TRUE, removes all abbreviations and replacement words in common_words
stem	logical. If TRUE, words are stemmed

10 corp\_data1

#### **Details**

This function takes a variety of options, each of which changes the behavior. Without the default settings, clean\_strings will do the following: make the string lowercase; replace special characters &, \$, \names ("and", "dollar", "percent", "at"); convert tabs to spaces and removes extra spaces. This default cleaning puts the strings in a standard format to allow for easier matching.

The other options allow for the removal or replacement of other words or characters.

#### Value

cleaned strings

corporate\_words

corporate\_words

#### Description

Data.frame with common corporate abbreviations in column 1 and corresponding long names in column 2. Useful for cleaning company names for matching.

# Usage

corporate\_words

#### **Format**

An object of class data. table (inherits from data. frame) with 54 rows and 2 columns.

#### See Also

clean\_strings

corp\_data1

corp\_data1

# Description

Some made up data on the top 10 US companies in the Fortune 500. Mock-matched to corp\_data2 in examples/match\_template.R

#### Usage

corp\_data1

#### Format

An object of class data.table (inherits from data.frame) with 10 rows and 6 columns.

corp\_data2

corp\_data2

corp\_data2

# Description

Some made up data on the top  $10~\mathrm{US}$  companies in the Fortune 500. Mock-matched to corp\_data1 in examples/match\_template.R

# Usage

corp\_data2

#### **Format**

An object of class data.table (inherits from data.frame) with 10 rows and 6 columns.

fund\_words

fund\_words

# **Description**

Data.frame with abbreviations common in the names of financial (i.e. mutual) funds in column 1 and corresponding long names in column 2. Useful for cleaning fund names for matching.

# Usage

fund\_words

# **Format**

An object of class data. frame with 63 rows and 2 columns.

#### See Also

clean\_strings

12 fuzzy\_match

fuzzy\_match

Use string distances to match on names

# **Description**

Use the stringdist package to perform a fuzzy match on two datasets.

# Usage

```
fuzzy_match(
  data1,
  data2,
  by = NULL,
  by.x = NULL,
  by.y = NULL,
  suffixes,
  unique_key_1,
  unique_key_2,
  fuzzy_settings = list(method = "jw", p = 0.1, maxDist = 0.05, matchNA = FALSE,
      nthread = getOption("sd_num_thread"))
)
```

# Arguments

data1	data.frame. First to-merge dataset.
data2	data.frame. Second to-merge dataset.
by	character string. Variables to merge on (common across data 1 and data 2). See $\mbox{\scriptsize merge}$
by.x	character string. Variable to merge on in data1. See merge
by.y	character string. Variable to merge on in data2. See merge
suffixes	character vector with length==2. Suffix to add to like named variables after the merge. See merge
unique_key_1	character vector. Primary key of data1 that uniquely identifies each row (can be multiple fields)
unique_key_2	character vector. Primary key of data2 that uniquely identifies each row (can be multiple fields)
fuzzy_settings	list of arguments to pass to to the fuzzy matching function. See amatch.

#### **Details**

stringdist amatch computes string distances between every pair of strings in two vectors, then picks the closest string pair for each observation in the dataset. This is used by fuzzy\_match to perform a string distance-based match between two datasets. This process can take quite a long time, for quicker matches try adjusting the nthread argument in fuzzy\_settings. The default fuzzy\_settings are sensible starting points for company name matching, but adjusting these can greatly change how the match performs.

match\_evaluate 13

# Value

a data.table, the resultant merged data set, including all columns from both data sets.

match\_evaluate evaluate a matched dataset

# Description

match\_evaluate takes in matches and outputs summary statistics for those matches, including the number of matches in each tier and the percent matched from each dataset.

# Usage

```
match_evaluate(
  matches,
  data1,
  data2,
  unique_key_1,
  unique_key_2,
  suffixes = c("_1", "_1"),
  tier = "tier",
  tier_order = NULL,
  quality_vars = NULL
)
```

# Arguments

matches	data.frame. Merged dataset.
data1	data.frame. First to-merge dataset.
data2	data.frame. Second to-merge dataset.
unique_key_1	character vector. Primary key of data1 that uniquely identifies each row (can be multiple fields)
unique_key_2	character vector. Primary key of data2 that uniquely identifies each row (can be multiple fields)
suffixes	character vector. Mnemonics associated data1 and data2.
tier	character vector. Default=NULL. The variable that defines a tier.
tier_order	character vector. Default= "tier". Variable that defines the order of tiers, if needed.
quality_vars	character vector. Variables you want to use to calculate the quality of each tier. Calculates mean.

14 merge\_plus

#### **Details**

The most straightforward way to use match\_evaluate is to pass it to the evaluate argument of tier\_match or merge\_plus. This will have merge\_plus return a data.table with the evaluation information, alongside the matches themselves.

T

match\_evaluate returns the number of matches in each tier, the number of unique matches in each tier, and the percent matched for each dataset. If no tiers are supplied, the entire dataset will be used as one "tier." The argument quality\_vars allows for the calculation of averages of any columns in the dataset, by tier. The most straightforward case would be a matchscore, which can again all be done in merge\_plus with the scoring argument. This lets you see the average matchscore by tier.

#### Value

data.table. Table describing each tier according to aggregate\_by variables and quality\_vars variables.

#### See Also

merge\_plus

merge\_plus

Merge two datasets either by exact, fuzzy, or multivar-based matching

#### **Description**

merge\_plus is a wrapper for a standard merge, a fuzzy string match, and a a "multivar" match based on several columns of the data. Parameters allow for control for fine-tuning of the match. This is primarily used as the workhorse for the tier\_match function.

# Usage

```
merge_plus(
   data1,
   data2,
   by = NULL,
   by.x = NULL,
   by.y = NULL,
   suffixes = c("_1", "_2"),
   check_merge = TRUE,
   unique_key_1,
   unique_key_2,
   match_type = "exact",
   fuzzy_settings = build_fuzzy_settings(),
   score_settings = NULL,
   filter = NULL,
   filter.args = list(),
```

merge\_plus 15

```
evaluate = match_evaluate,
  evaluate.args = list(),
  allow.cartesian = FALSE,
  multivar_settings = build_multivar_settings()
)
```

#### **Arguments**

data1

gnette.) data2 data.frame. Second to-merge dataset. by character string. Variables to merge on (common across data 1 and data 2). See length-1 character vector. Variable to merge on in data1. See merge by.x length-1 character vector. Variable to merge on in data2. See merge by.y suffixes character vector with length==2. Suffix to add to like named variables after the merge. See merge logical. Checks that your unique\_keys are indeed unique. check\_merge character vector. Primary key of data1 that uniquely identifies each row (can be unique\_key\_1 multiple fields) unique\_key\_2 character vector. Primary key of data2 that uniquely identifies each row (can be multiple fields) string. If 'exact', match is exact, if 'fuzzy', match is fuzzy. If 'multivar,' match match\_type is multivar-based. See multivar\_match, fuzzy\_settings additional arguments for amatch, to be used if match type = 'fuzzy'. Suggested defaults provided. See build\_fuzzy\_settings. score\_settings list. Score settings for post-hoc matchscores. See build\_score\_settings filter

list. Score settings for post-hoc matchscores. See build\_score\_settings function or numeric. Filters a merged data1-data2 dataset. If a function, should take in a data.frame (data1 and data2 merged by name1 and name2) and spit out a trimmed verion of the data.frame (fewer rows). Think of this function as applying other conditions to matches, other than a match by name. The first argument of filter should be the data.frame. If numeric, will drop all observations with a matchscore lower than or equal to filter.

data.frame. First to-merge dataset (ordering matters - see Fuzzy Matching vi-

filter.args list. Arguments passed to filter, if a function evaluate Function to evalute merge\_plus output.

evaluate.args list. Arguments passed to evaluate

allow.cartesian

whether or not to allow many-many matches, see data.table::merge()

multivar\_settings

list of settings to go to the multivar match if match\_type == 'multivar'. See multivar-match and build\_multivar\_settings.

#### Value

list with matches, filtered matches (if applicable), data1 and data2 minus matches, and match evaluation

16 multivar\_match

#### See Also

match evaluate

multivar\_match

Matching by computing multivar\_scores based on several variables

# Description

multivar\_match computes a multivar\_score between each pair of observations between datasets x and y using several variables, then executes a merge by picking the highest multivar\_score pair for each observation in x.

# Usage

```
multivar_match(
  data1,
  data2,
  by = NULL,
  by.x = NULL,
  by.y = NULL,
  unique_key_1,
  unique_key_2,
  logit = NULL,
 missing = FALSE,
 wgts = NULL,
  compare_type = "diff",
  blocks = NULL,
  blocks.x = NULL,
  blocks.y = NULL,
  nthread = 1,
  top = 1,
  threshold = NULL,
  suffixes = c("_1", "_2")
)
```

# **Arguments**

```
data1 data.frame. First to-merge dataset.

data2 data.frame. Second to-merge dataset.

by character string. Variables to merge on (common across data 1 and data 2). See merge

by.x character string. Variable to merge on in data1. See merge

by.y character string. Variable to merge on in data2. See merge

unique_key_1 character vector. Primary key of data1 that uniquely identifies each row (can be multiple fields)
```

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character vector. Primary key of data2 that uniquely identifies each row (can be unique\_key\_2 multiple fields) a glm or lm model as a result from a logit regression on a verified dataset. See logit details. missing boolean T/F, whether or not to treat missing (NA) observations as its own binary column for each column in by. See details. rather than a lm model, you can supply weights to calculate multivar\_score. Can wgts be weights from calculate\_weights. a vector with the same length as "by" that describes how to compare the varicompare\_type ables. Options are "in", "indicator", "substr", "difference", "ratio", and "stringdist". See X for details. blocks variable present in both data sets to "block" on before computing scores. multivar\_scores will only be computed for observations that share a block. See details. blocks.x name of blocking variables in x. cannot supply both blocks and blocks.x blocks.v name of blocking variables in y. cannot supply both blocks and blocks.y nthread integer. Number of cores to use when computing all combinations. See parallel::makecluster() integer. Number of matches to return for each observation. top threshold numeric. Minimum score for a match to be included in the result.

#### **Details**

suffixes

The best way to understand this function is to see the vignette 'Multivar\_matching'.

There are two ways of performing this match: either with or without a pre-trained logit. To use a logit, you must have a verified set of matches. The names of the variables in this set must match the names of the variables in the data you pass into multivar\_match. Without a pre-trained logit, you must have a set of weights for each variable that you want in the comparison. These can either be made up ahead of time, or you can use a verified set of matches and calculate\_weights.

#### Value

a data.table, the resultant match, including columns from both data sets.

see merge

|--|

#### **Description**

Common special characters and their replacements for string cleaning

#### Usage

sp\_char\_words

18 tier\_match

# **Format**

An object of class data. table (inherits from data. frame) with 4 rows and 2 columns.

State\_FIPS

State\_FIPS

# **Description**

Data.table with state FIPS codes and abbreviations.

#### Usage

State\_FIPS

#### **Format**

An object of class data.table (inherits from data.frame) with 55 rows and 3 columns.

tier\_match

Perform an iterative match by tier

# Description

Constructs a tier\_match by running merge\_plus with different parameters sequentially on the same data. Allows for sequential removal of observations after each tier.

# Usage

```
tier_match(
 data1,
 data2,
 by = NULL,
 by.x = NULL,
 by.y = NULL,
  suffixes = c("_1", "_2"),
  check_merge = TRUE,
  unique_key_1,
  unique_key_2,
  tiers = list(),
  takeout = "both",
 match_type = "exact",
  clean = FALSE,
  clean_settings = build_clean_settings(),
  score_settings = NULL,
  filter = NULL,
```

tier\_match 19

```
filter.args = list(),
  evaluate = match_evaluate,
  evaluate.args = list(),
  allow.cartesian = TRUE,
  fuzzy_settings = build_fuzzy_settings(),
  multivar_settings = build_multivar_settings(),
  verbose = FALSE
)
```

#### **Arguments**

data1 data.frame. First to-merge dataset.
data2 data.frame. Second to-merge dataset.

by character string. Variables to merge on (common across data 1 and data 2). See

merge

by . x character string. Variable to merge on in data1. See merge by . y character string. Variable to merge on in data2. See merge

suffixes see merge

check\_merge logical. Checks that your unique\_keys are indeed unique, and prevents merge

from running if merge would result in data.frames larger than 5 million rows

unique\_key\_1 character vector. Primary key of data1 that uniquely identifies each row (can be

multiple fields)

unique\_key\_2 character vector. Primary key of data2 that uniquely identifies each row (can be

multiple fields)

tiers list(). tier is a list of lists, where each list holds the parameters for creating that

tier. All arguments to tier\_match listed after this argument can either be supplied

directly to tier\_match, or indirectly via tiers.

takeout character vector, either 'data1', 'data2', 'both', or 'neither'. Removes observa-

tions after each tier from the selected dataset.

match\_type string. If 'exact', match is exact, if 'fuzzy', match is fuzzy.

clean Boolean, T/F, whether or not to clean strings prior to the match.

clean\_settings list. Settings for string cleaning. See clean\_strings and build\_clean\_settings.

score\_settings list. Settings for post-hoc matchscoring. See build\_score\_settings.

filter function or numeric. Filters a merged data1-data2 dataset. If a function, should

take in a data.frame (data1 and data2 merged by name1 and name2) and spit out a trimmed verion of the data.frame (fewer rows). Think of this function as applying other conditions to matches, other than a match by name. The first argument of filter should be the data.frame. If numeric, will drop all observations

with a matchscore lower than or equal to filter.

filter.args list. Arguments passed to filter, if a function

evaluate Function to evalute merge\_plus output. see evaluate\_match.

evaluate.args list. Arguments passed to function specified by evaluate

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allow.cartesian

whether or not to allow many-many matches, see data.table::merge()

fuzzy\_settings additional arguments for amatch, to be used if match\_type = 'fuzzy'. Suggested

defaults provided. (see amatch, method='jw')

multivar\_settings

list of settings to go to the multivar match if match\_type == 'multivar'. See

multivar-match.

verbose boolean, whether or not to print tier names and time to match each tier as the

matching happens.

#### **Details**

See the tier match vignette to get a clear understanding of the tier\_match syntax.

#### Value

list with matches, data1 and data2 minus matches, and match evaluation

#### See Also

```
merge_plus clean_strings
```

#### **Description**

#' wgt\_jaccard\_distance computes the Weighted Jaccard Distance between two strings. It is vectorized, and accepts only two equal-length string vectors.

#### Usage

```
wgt_jaccard_distance(string_1, string_2, corpus, nthreads = 1)
```

#### **Arguments**

string\_1 character vector string\_2 character vector

corpus corpus data.table, constructed with fedmatch::build\_corpus

nthreads number of threads to use in the underlying C++ code

#### **Details**

See the vignette fuzzy\_matching for details on how the Weighted Jaccard similarity is computed.

#### Value

numeric vector with the Weighted Jaccard distances for each element of string\_1 and string\_2.

word\_frequency 21

word\_frequency

Compute frequency of words in a corpus

# Description

word\_frequency counts the frequency of words in a set of strings. Also does minimal cleaning (removes punctuation and extra spaces). Useful for determining what words are common and may need to be replaced or removed with clean\_strings.

# Usage

```
word_frequency(string)
```

# **Arguments**

string

character vector

#### Value

data.table with word frequency

World\_Bank\_Codes

World\_Bank\_Codes

# Description

World Bank 3-Character Country Codes for 213 countries

# Usage

World\_Bank\_Codes

# **Format**

An object of class data.table (inherits from data.frame) with 213 rows and 2 columns.

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