



Semantic Annotations for Interoperability

Ontologies, a smart way towards interoperability
(IAE, Paris, April 13 2006)

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I. Integration and Interoperability

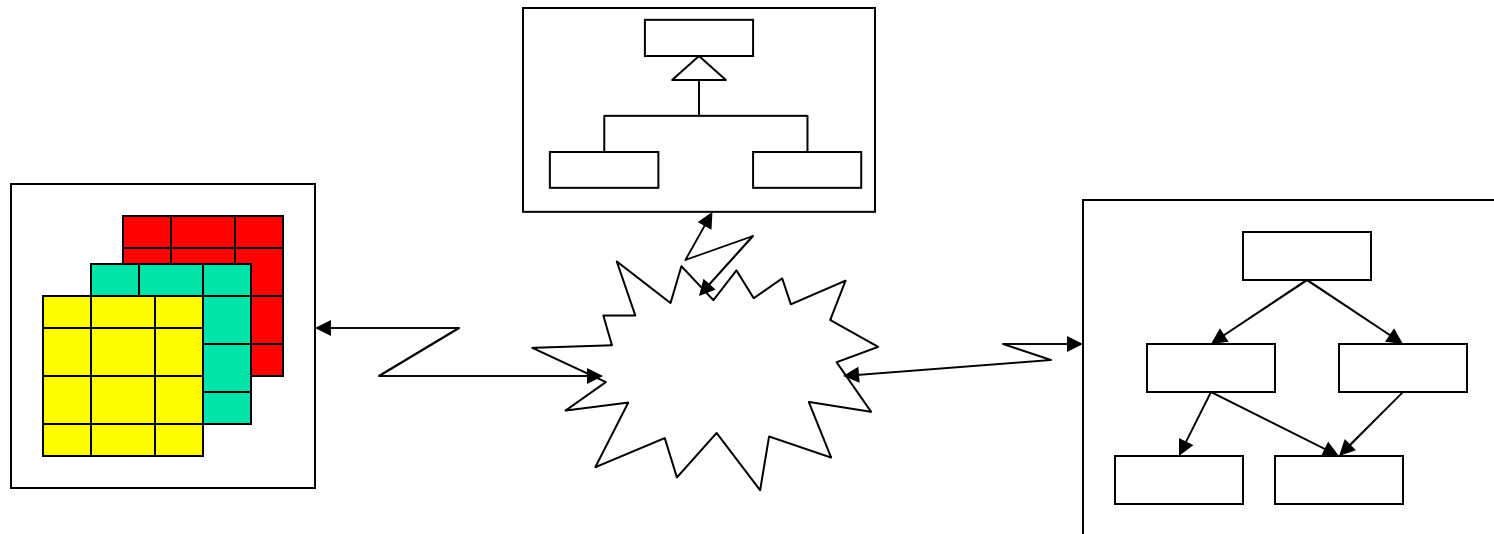
1. Problem
2. Approaches (« process » vs « objets »)

II. Ontology and Semantic Interoperability

III. Enterprise Modeling and Semantic Interoperability

■ Large scale

- Locally/widely distributed enterprises
- Federated enterprises, Virtual Enterprises, etc.
- Enterprise Alliances, Merges, etc.



- *Small Scale* : Illustrative *Example*

- concat : string x string \rightarrow string
- string1: < size, value > (<4, ABCD>)
- string2: < value, ending mark > (<EF, #>)
- Result:
 - <5, ABCDEF>
 - OR <ABCDEF, #>

- *Solutions:*

1. Process-Oriented Interoperability
2. "Object" Oriented Interoperability

- *Back to the example:*

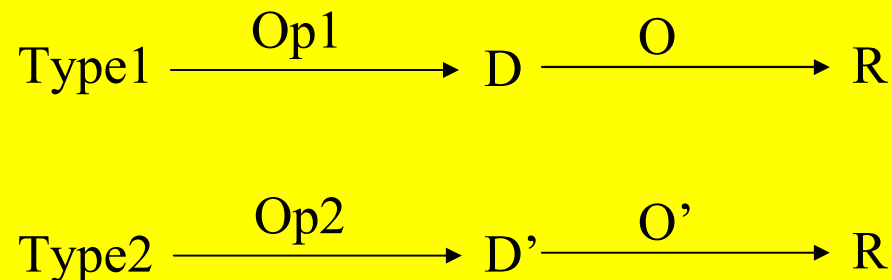
- Concat : string x string \rightarrow string
- string1: < size, value >
- string2: < value, ending mark >

- *Solution 1* : Process-Oriented Interoperability

- Concat1 : string1 x string1 \rightarrow string1
- Concat2 : string2 x string2 \rightarrow string2
- One or Two implementations of concat

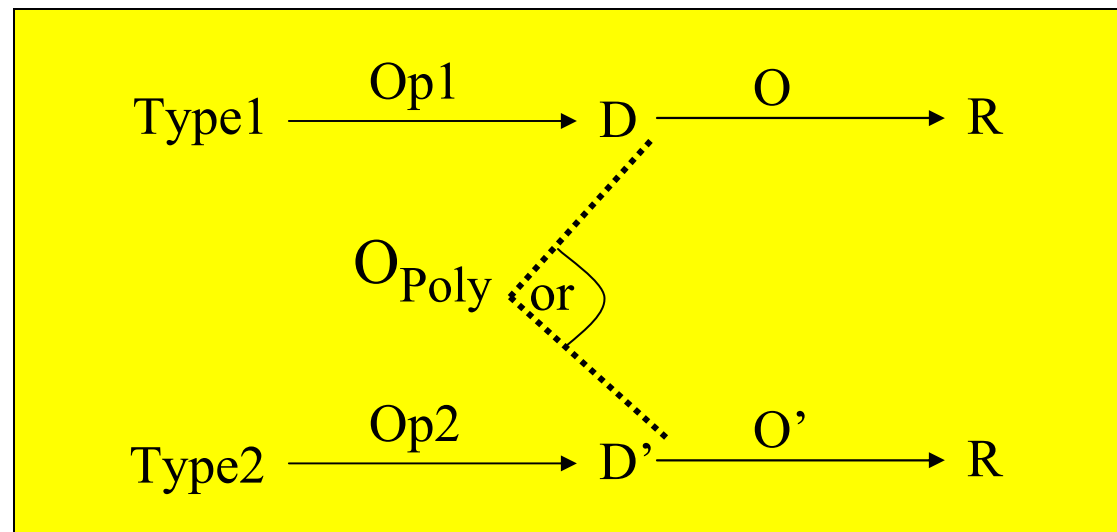
1/3. Polymorphism with no overloading nor coercion

- $\text{Op1: Type1} \rightarrow D$
- $\text{Op2: Type2} \rightarrow D'$
- $O: D \rightarrow R$
- How to apply O on $\text{Op2}(x : \text{Type2})$?
- Two implementations of O



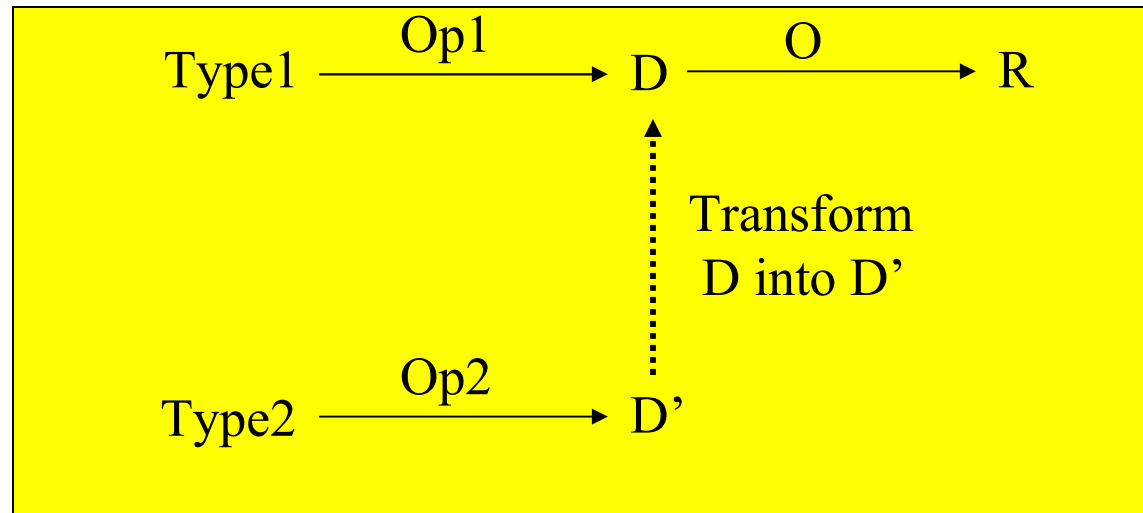
2/3. *Polymorphism without coercion, with overloading*

- Apply O on $Op2(x : Type2)$: A unique name (O_{poly})
- Invoke O or O' depending on the type of parameter



3/3. *Polymorphism with type coercion*

- Apply O to $Op2(x : \text{Type2})$



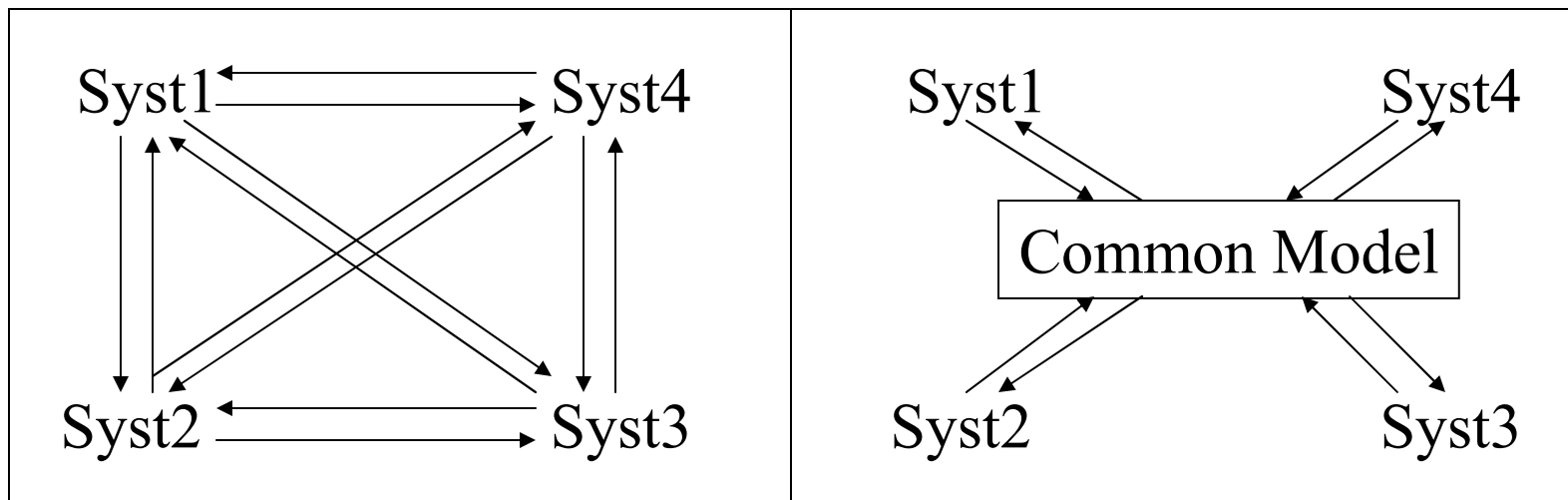
- Note: Similar situation when changing O into O'

- *Solution 2* : Object-Oriented interoperability
 - Concat : $\text{string1} \times \text{string1} \rightarrow \text{string1}$
 - Concat : $\mathbf{g}(\text{string2}) \times \mathbf{g}(\text{string2}) \rightarrow \mathbf{f}(\text{string1})$
 - $\mathbf{g} : \text{string2} \rightarrow \text{string1}$
 - $\mathbf{f} : \text{string1} \rightarrow \text{string2}$

- A single implementation
 - Structure Transformation/Mediation

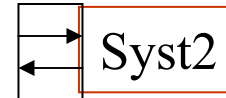
- How to determine g and f ?
- Data structure complexity?
- Structured vs (semi-)/unstructured?
- Data Semantics?
- Meta-data availability?

1. Naive Approach : $n*(n-1)$ converters
2. Common Model: $2*n$ converters

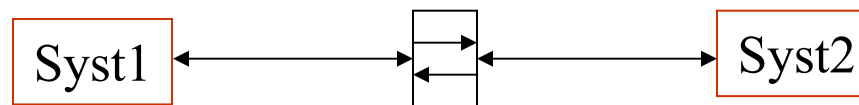


- What a "common model"?
 - Ad hoc
 - *Example* : Data Model of a common repository
 - Specific
 - *Example* : Relational, JDBC, ODBC, UEML
 - Standard
 - OMG/ODMG Object Model
 - XML
 - WfMC Interoperability Interface
 - OMG/CORBA IDL

- What an "architecture"?
 - Encapsulation/Wrapping

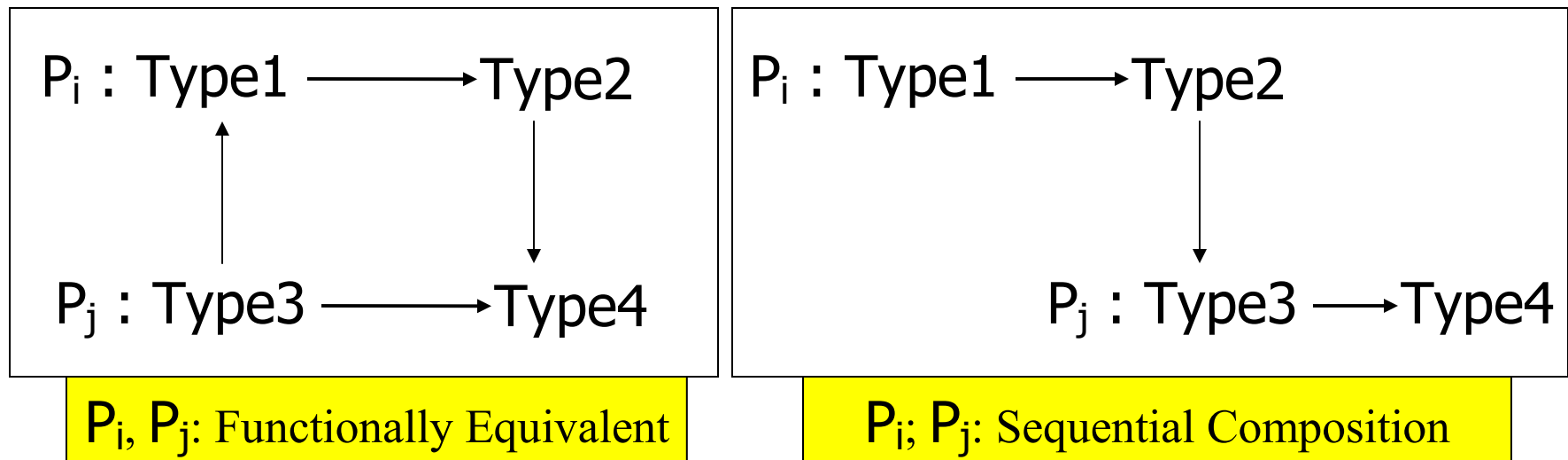


- Mediation ("Format negociators")



- As a summary:

A Program/System P_i (on a site S_i) wants to use data/objects/services produced/offered by a Program/System P_k (on a site S_k)



- Software System : {Components}
 - Possibly heterogeneous and distributed components
 - That communicate
 - Data, Results, Events, Requests for services, etc.
 - AND Cooperate in task achievement
 - Synchronization
 - Sharing
 - etc.

Dimensions:

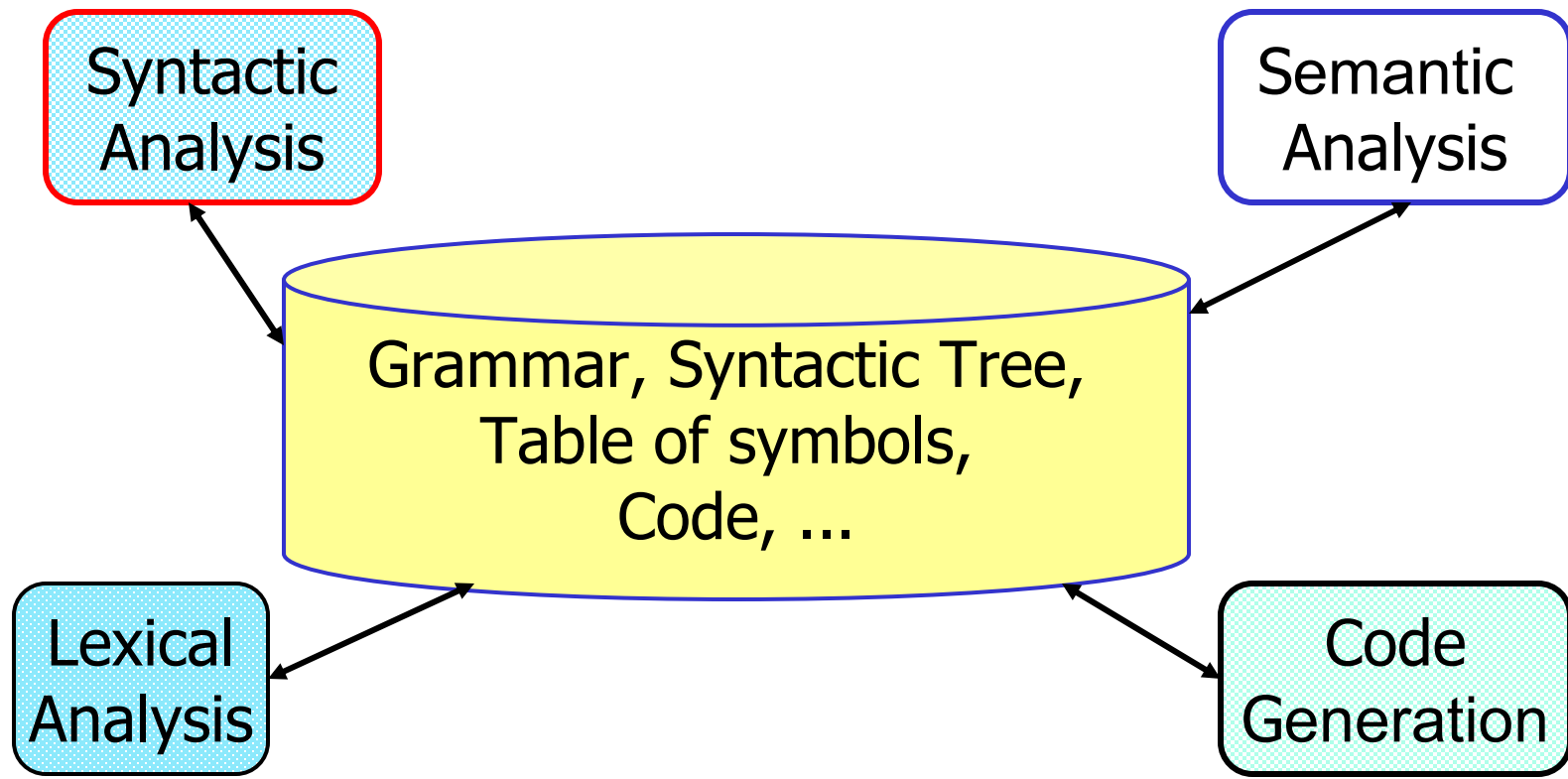
1. Interfaces : *look and feel*
2. Platforms : Transparency
 - Technologies, Operating Systems
 - Distribution, Protocols, etc.
3. Data :
 - Communication and sharing (despite the possible heterogeneity)
4. Control : Notification/Reaction to events
5. Process Models : Rules that govern the behaviour of the software systems

- (Some) Models for the communication and the sharing of data/information
 1. Data flow (*pipe and filter*)
 2. Repository (private, shared)
 3. Client/Server

Repository-based Model

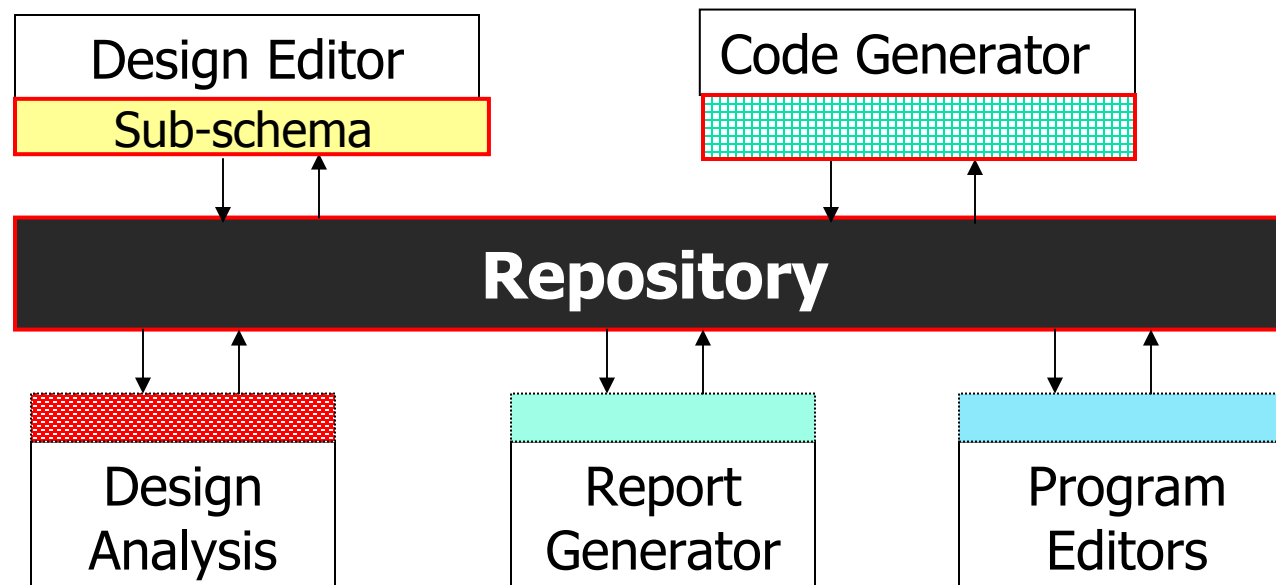
1. Repository : Common « Database »

- Example: Compiler (tight integration)



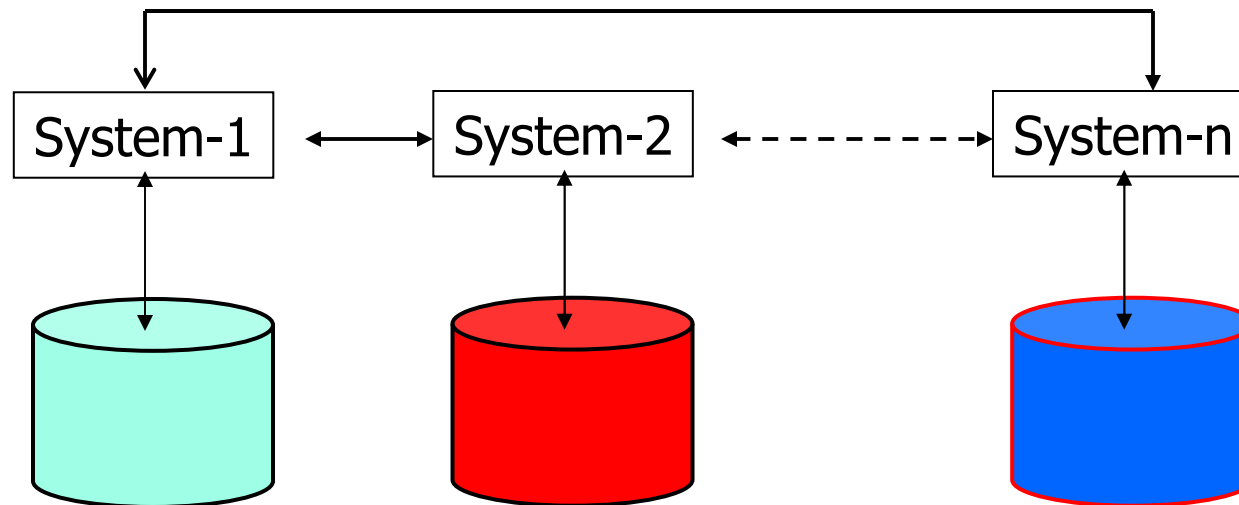
Shared Repository Model

- Example: CASE Environment
- 'Enveloppes' (Wrappers)



2. Private Repository

- Communication by message passing



■ Private Repository

- (+) Independent sub-systems: production of data without caring about their usage by others
- (-) Negotiation/Mediation of formats (often) required

■ *Commun repository*

- (+) Efficient mean for exchange (no transfer)
- (+) Protection/Sharing thanks to sub-schemas
- (+) Repository Manager services
 - Back-ups
 - Recovery in case of failure
 - Security
 - Access Control

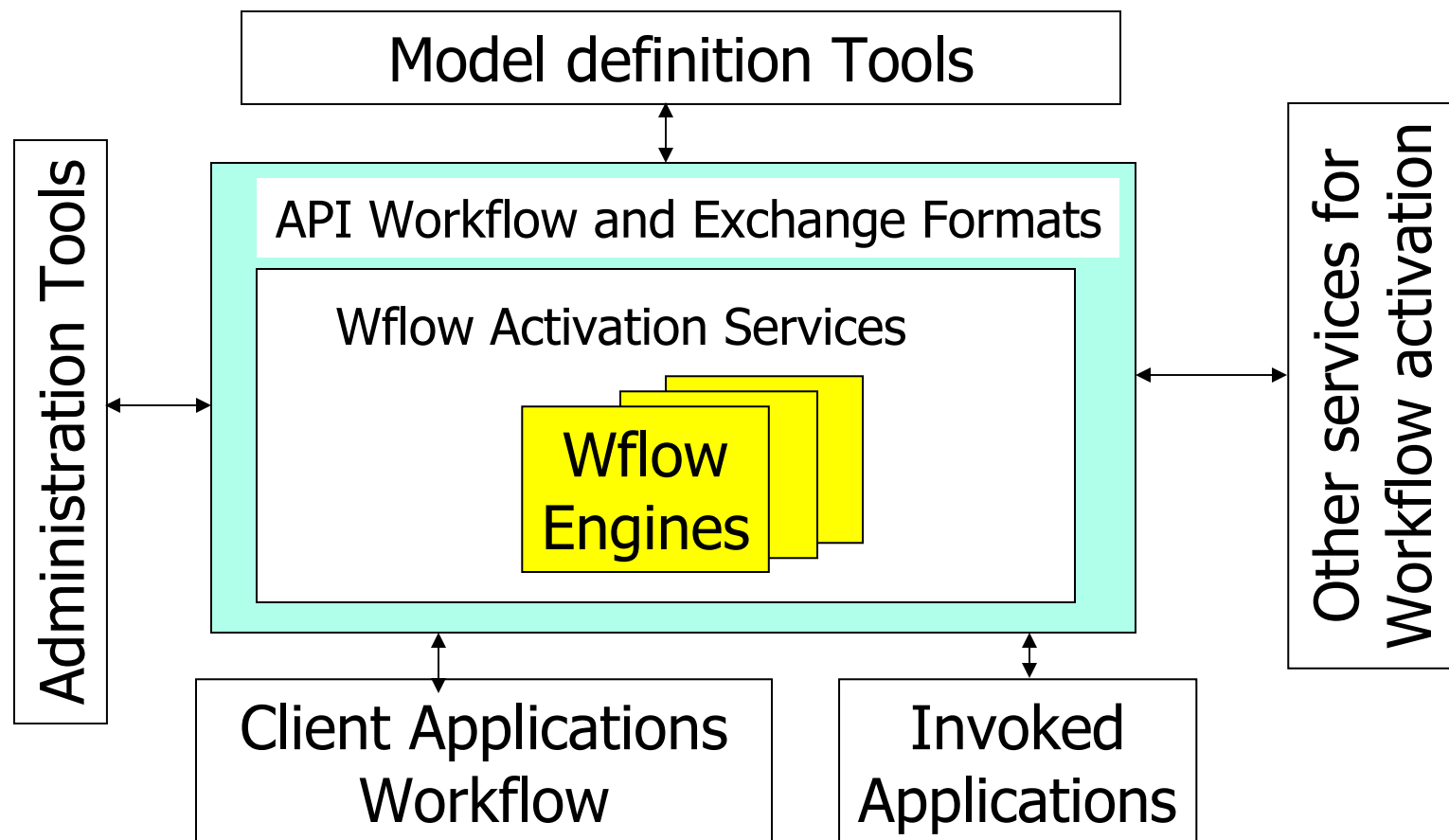
Commun repository

- (-) Common Data Format/Model or mediators
- (-) Specific security, back-up, etc. policies
- (-) Evolutivity : Integration of new systems
- (-) Distribution of the Repository

- Generic Architectures
- Reference Architectures:
 - To describe a class of systems
 - To be able to compare the systems of a domain

2/2. Reference Architectures: Example

■ WfMC : Workflow Management Coalition



- Other examples: CORBA, UDDI, etc.
- Syntactic Definitions
 - $Op1 : Type1 \rightarrow Type2$
 - $Op2 : Type1 \rightarrow Type2$
 - $Op1 :: Op2 ?$
- No semantics
 - For operations/services
 - For objects (content)
- Currently (over the Web):
 - Ontology
 - Semantic Annotations

- Exchange, Communication between heterogeneous systems
- Middlewares, Formats and protocols
 - common
 - ad hoc
 - standards
- Do not prevent from mediation
- Lack of semantics: 'understand' (and consistently interpret) not only the structure but also the content

- I. Integration and Interoperability
 - 1. Problem
 - 2. Approaches (« process » vs « objets »)

Questions?

I. Integration and Interoperability

1. Problem
2. Approaches (« process » vs « objets »)

II. Ontology and Semantic Interoperability

III. Enterprise Modeling and Semantic Interoperability

- An approach: Use of ontologies
- Ontology = branch of philosophy about 'essence of things' that exist in world, in a domain
- Definition :
 1. [Gruber] : Formal and explicit Specification *of a shared conceptualization*
 2. [W3C] : defines the terms used to describe and represent a domain of knowledge

- *Purpose of an ontology:* to be used by persons, applications, information bases, ... that need to share information about a domain

- Examples:
 - Biology, Genomics
 - Automotive industry
 - Finances
 - ...

■ Ontology Anatomy : Types of components

1. Concepts or classes:

- Represent a set of entities within a domain
- Organized as taxonomy(s)

2. Relations:

- Represent inter-actions among concepts
- May be organized as a taxonomy

■ Ontology Anatomy : Types of components

3. Axioms:

- 'Sentences/Assertions' always true
- Constrain class values
- Define arguments of the relations

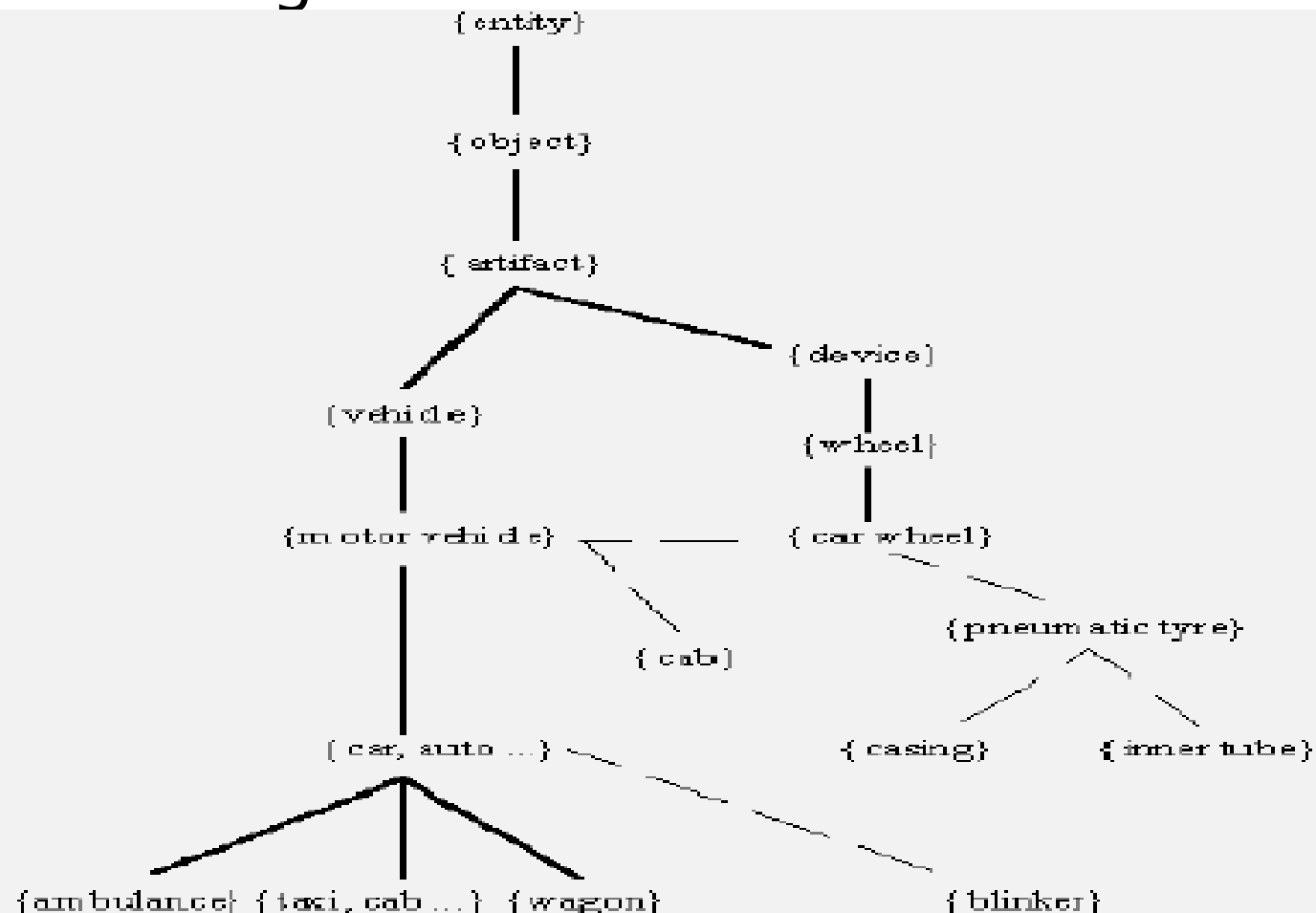
4. Instances:

- Representation of individuals of the classes

Semantic Interoperability

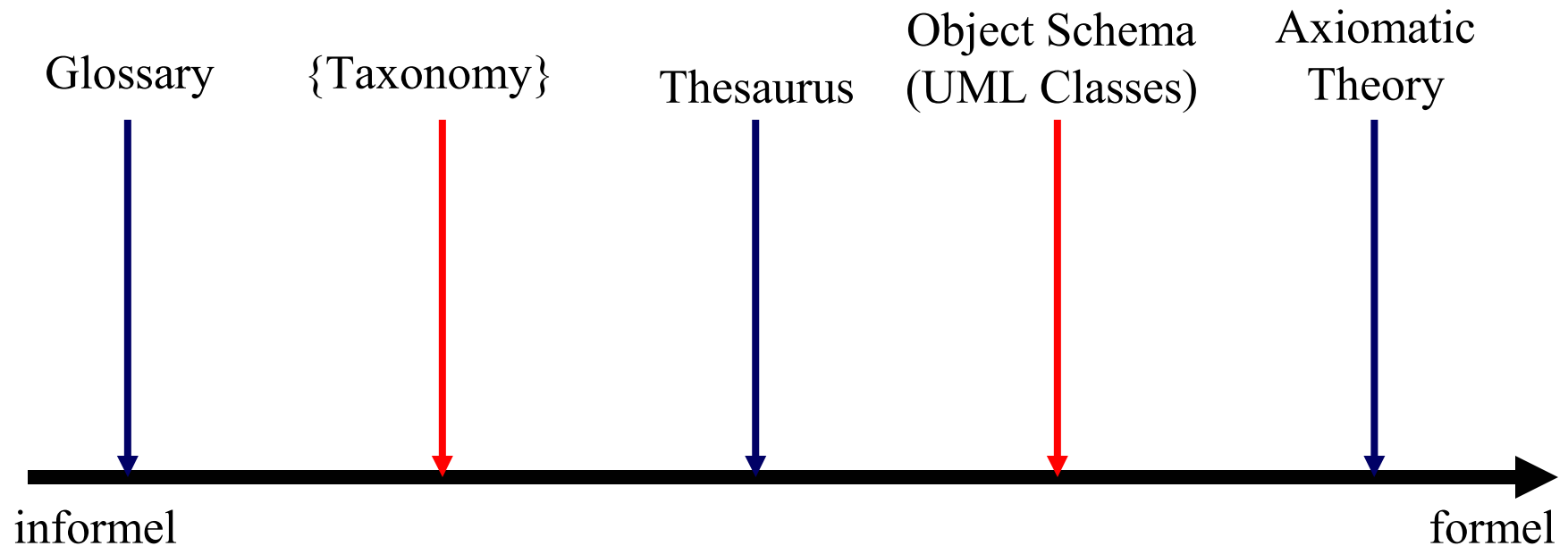
Levels	Concepts	Examples
<i>Higher</i>	The most general	<ul style="list-style-type: none"> ■ Actor, process ■ Event, Goal ■ Business Rule
<i>Domain/ Application</i>	Specific to an application domain	<ul style="list-style-type: none"> ■ Employee ■ Bill ■ Order
<i>Lower</i>	Specific attributes and concepts used for composing the concepts in the domain level	<ul style="list-style-type: none"> ■ Date, duration ■ Name, Address ■ Amount, Cost ■ ...

Wordnet: English Lexical Base





- Typology of Ontology description languages
 - *Unformal* : natural language (cf. glossaries)
 - *Unformal structured* : « restricted » natural language
 - *Semi-formal* : Artificial language usually without theoretic foundations
 - *Formal* : terms defined with
 - Formal Semantic
 - Theorems
 - Proof
 - Properties (completeness, consistency, ...)



- Representation Languages:

- UML, Express, Ontolingua, XML, etc.

- Knowledge Exchange Languages:

- KIF: Knowledge Interchange Format
- PIF: Process Interchange Format
- CDIF: Common Data Interchange Format

- Translation Tools

- Ontolingua Translators
- Step Tools (STandard for the Exchange of Product model data, ISO-1033, often associated with EXPRESS, for the specification of information model)
- etc.

- *Idea* : Improve the communication between humans and machines for:
 - 1) Assisting the communication between persons
 - 2) Interoperability between systems
 - 3) Improving the process and/or the system engineering quality

- 1) Systems Interoperability: thanks to 'translators' between
 - Different Modeling Methods
 - Different paradigms
 - Different languages and Software Tools
- In this situation: Ontology \approx Common Exchange Format

2) Improve the process and/or the system engineering quality

1) Re-use:

- Ontology = basis for a formal encoding of important « things » (entities, attributes, processes, relations) within a domain
- Ontology = Formal Representation that might
 - Be re-used
 - Become a shared componentin Software systems

2. Information Retrieval:

- Ontology \approx meta-data for
 - Indexing
 - Accessing

An information repository

3. Safety/Reliability:

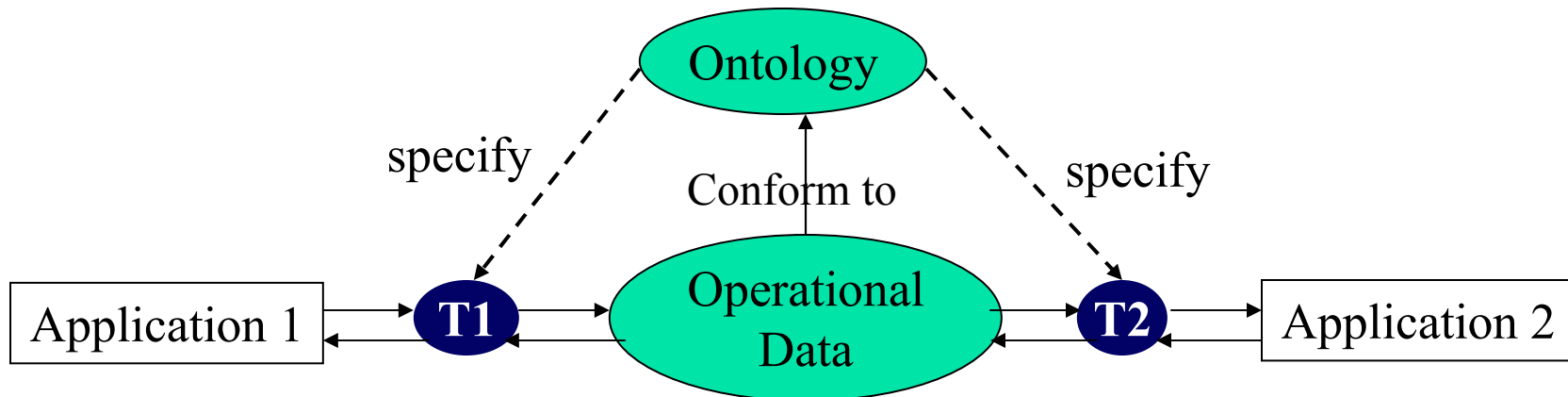
- Base the verification of constraints on the formal specification of the ontology

4. etc.

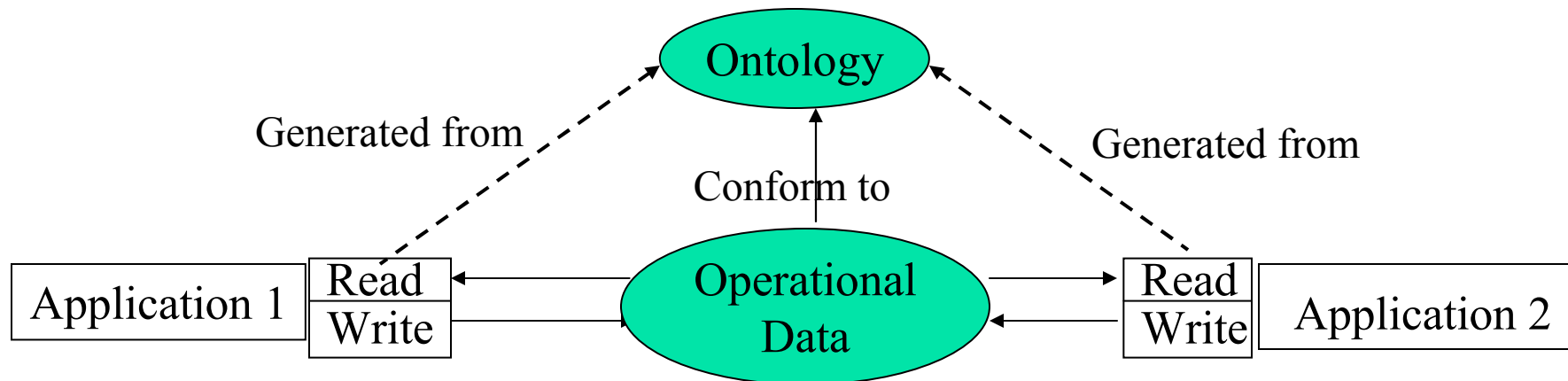
1. Data access through a shared ontology:

■ Exemple:

- Ontology \approx Library of process Models (PIF)
- Applications : Different Formats (ex: IDEF3, ILOG)

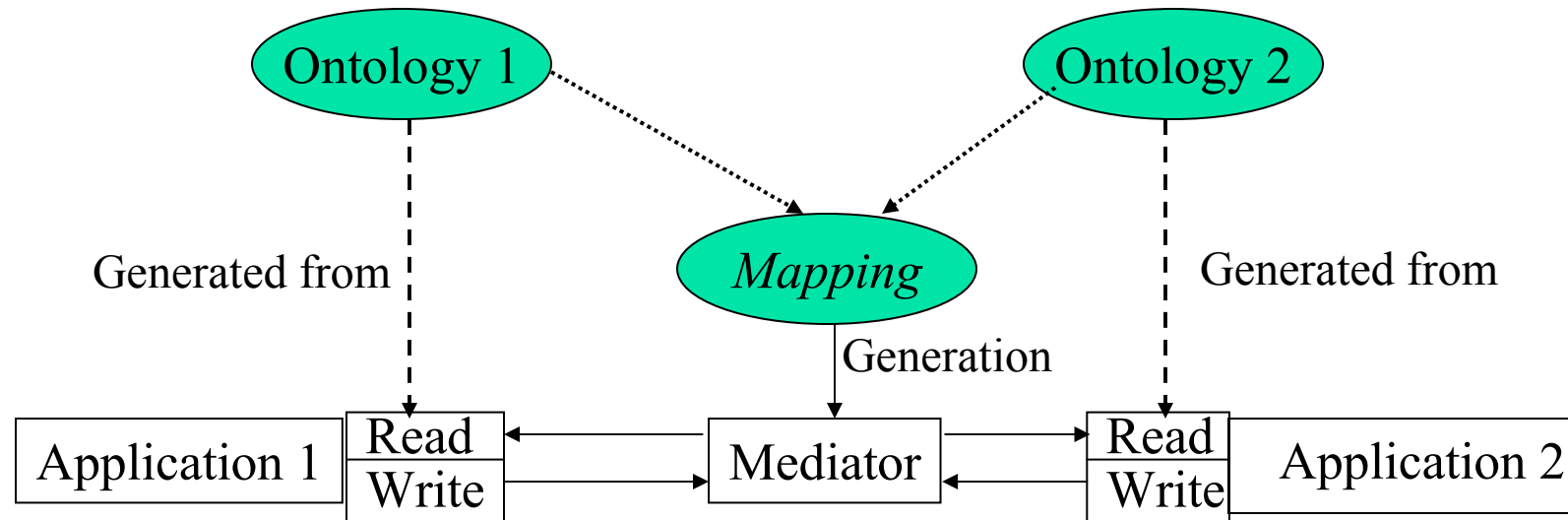


2. Data access through a shared ontology: *An alternative to translators*



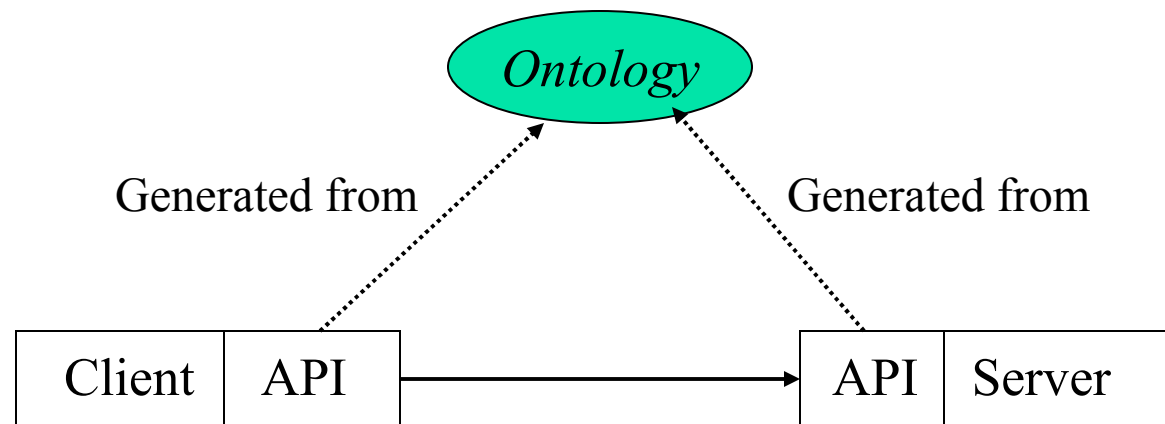
Ontology: Usage Examples

3. Data Access thanks to correspondances (*mappings*) between ontologies



4. Sharing of services

- Example:
 - Ontology in IDL or UML
 - Used to generate the code of the clients/server interfaces



- Approach for Semantic Interoperability
- Mainly 'around the Web'
- Similarities to the structural integration and interoperability
 - Integration, Merging, correspondance between ontologies
 - Heterogeneous Ontologies, ...
- Other extensions: Semantic Annotations

- **Annotate:** to add a brief explanation or opinion to a text or drawing (*Cambridge advanced learner's dictionary, <http://dictionary.cambridge.org/>*)
- **Annotation:** A comment attached to a particular section of a document. Many computer applications enable you to enter annotations on text documents, spreadsheets, presentations, and other objects. This is a particularly effective way to use computers in a workgroup environment to edit and review work... (*Webopmedia, <http://www.webopedia.com>*).

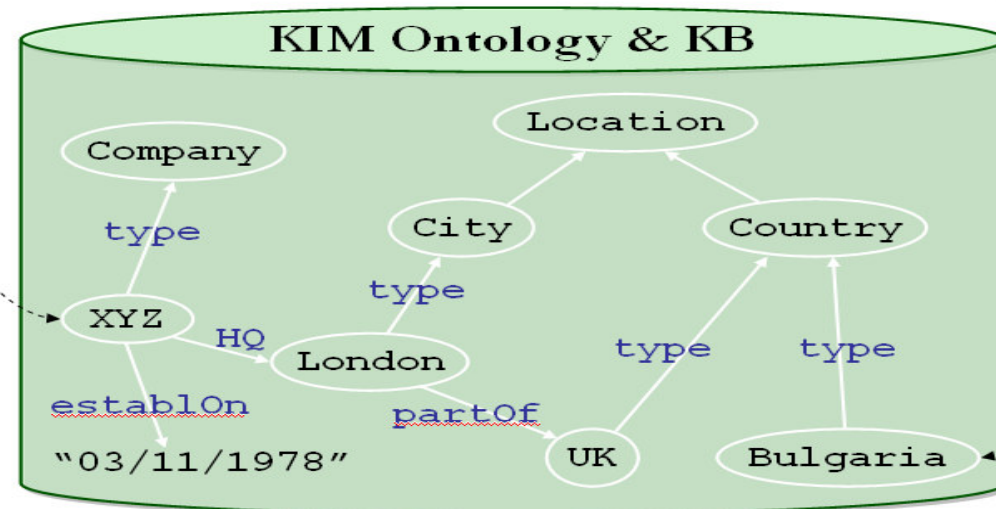
1. Decoration: annotations = comments associated with the resource
2. Linking: annotations = links
3. Instance Identification: the annotated object (U#X) is an instance of a given class and the annotation content may be a link to that class;

4. Aboutness: no assertion is made about the existence of an instance of the concept C, but there is a loose association with the concept;
 5. Pertinence: the target of the annotation may be of interest to the annotated object.
- Types of annotations to classify query results

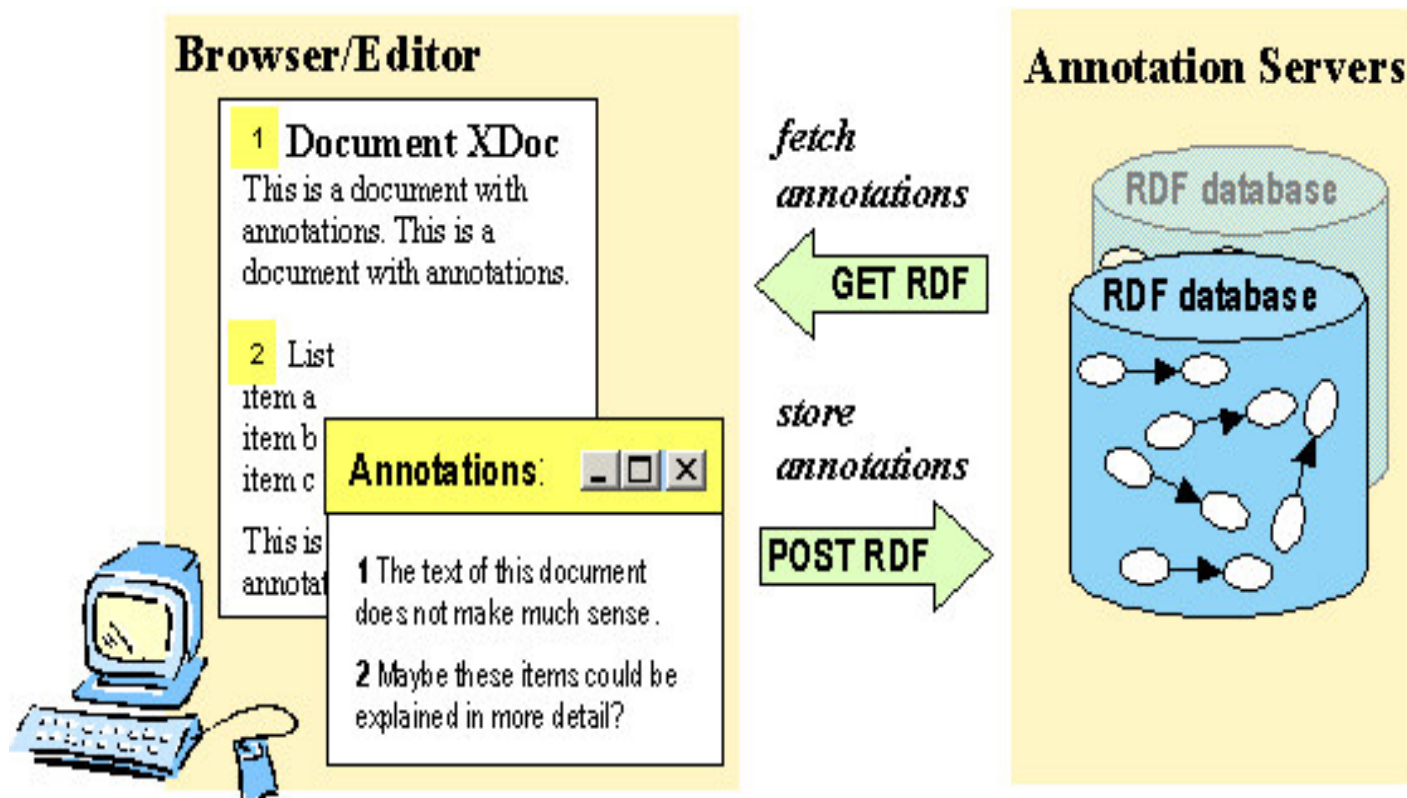
- Progressive move from manual to automatic or semi-automatic annotation provision
- Services to provide ("write") annotations?
- Content of some types of annotations relies on given ontologies \Rightarrow ontology services (like querying or browsing an ontology) have to be coupled with annotation services

- Infrastructure and services for automatic semantic annotation, indexing, and retrieval of unstructured and semi-structured content

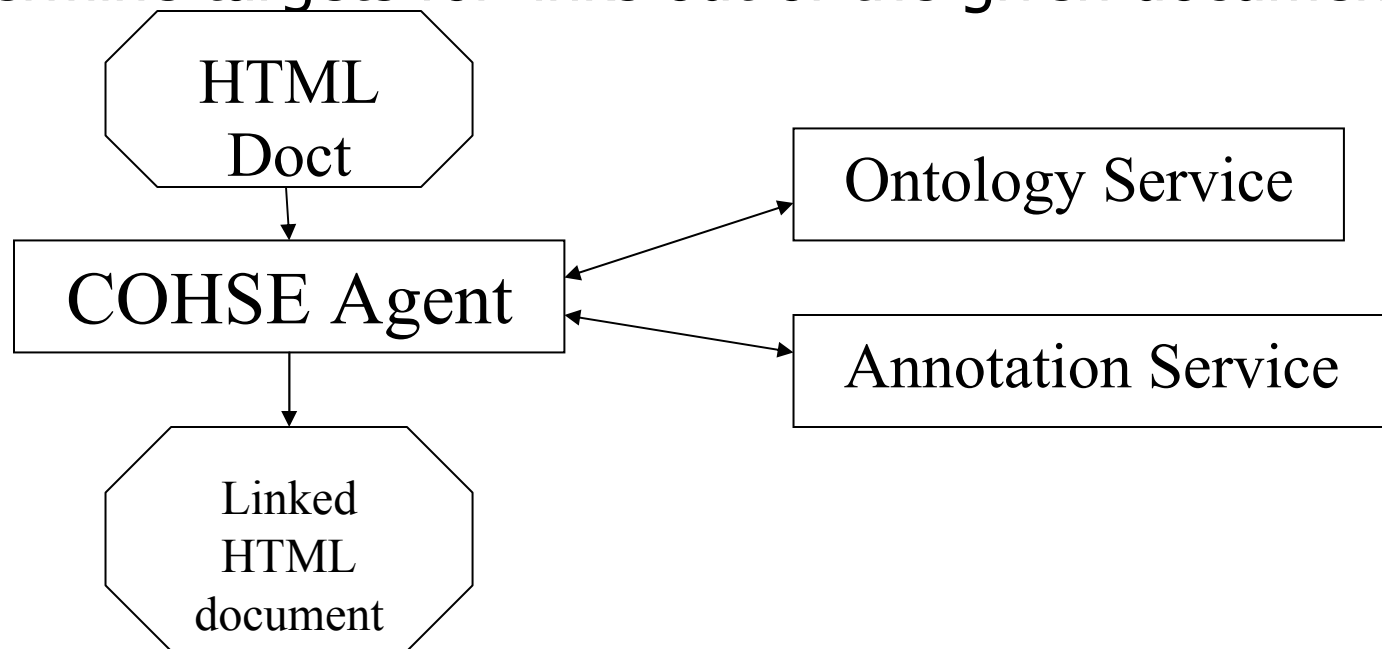
XYZ announced profits in Q3, planning to build a \$120M plant in Bulgaria, and more and more and more and more text



- Collaboration via shared metadata based Web annotations, bookmarks, and their combinations using
 - RDF-based annotation schema for describing annotations as metadata
 - XPointer for locating the annotations in the annotated document
- Annotea schema includes *properties* which links the annotation to the annotated resource:
 - *Annotates*: refers to the enclosing URI,
 - *context*: contains the location using Xpointer,
 - *Body*: link to the body of the annotation itself.



- *Conceptual Open Hypermedia Service*
- *Terms and words within a document used as entry points to an ontology*
- *Relevant concepts in the ontology can be used to determine targets for links out of the given document*



- Semantic annotation
 - Mainly for Web Documents and Web Services
 - Concepts and Tools available
- What about Enterprise Models and Systems?
(cf. ReX INTEROP, <http://www.interop-noe.org>)
- To what extent the current advances/approaches might be re-used for annotating enterprise models?

II. Ontology and Semantic Interoperability

Questions?

I. Integration and Interoperability

1. Problem
2. Approaches (« process » vs « objets »)

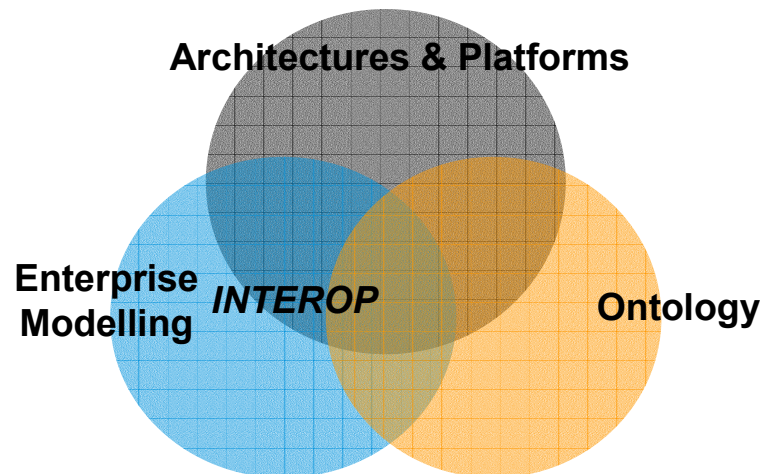
II. Ontology and Semantic Interoperability

III. Enterprise Modeling and Semantic Interoperability

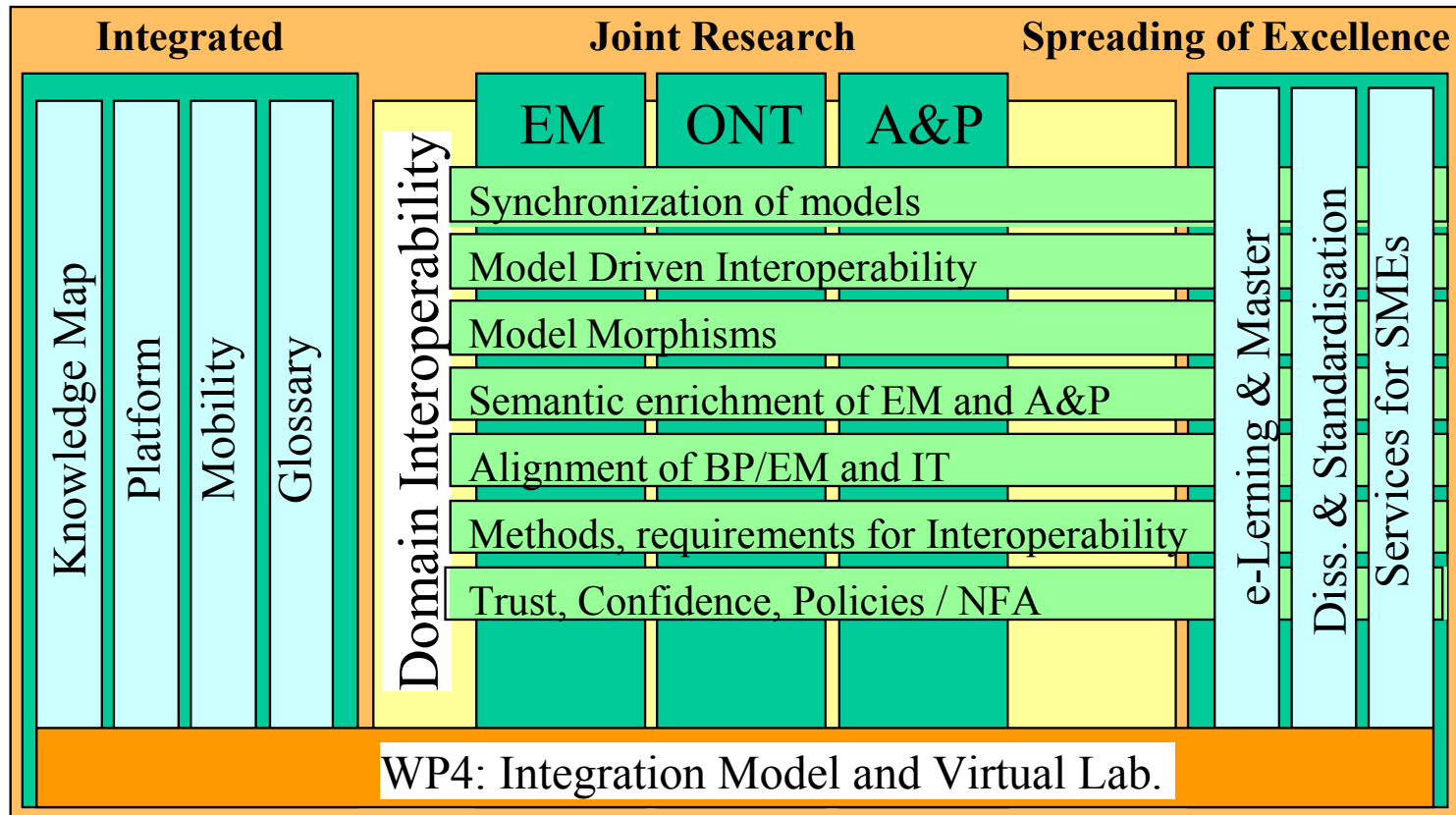
- Partners :
 - \approx 50 partners (laboratories, enterprises and research centers)
 - \approx 200 researchers and 120 PhD
 - 13 UE member states + Norway and Helvetic Confederation (Switzerland)
- Coordination : University Bordeaux 1 LAPS/GRAI
- Start : 1st November 2003
- Duration : 36 months (Probably extended to 42)

- Multidisciplinary approach for the Interoperability of Enterprise Applications and Software:
 - **Architecture & Platforms:** to provide implementation frameworks,
 - **Enterprise Modelling:** to define Interoperability requirements and to support solution implementation,
 - **Ontology:** to identify Interoperability semantics in the enterprise.

Knowledge integration for Interoperability research



INTEROP NoE Objectives & Work Program



What next?

- Enterprise Modelling
- Enterprise Ontologies
- First steps in Enterprise Models Annotation

- Understand, Analyze, Simulate, ...
- Diagnosis (disfunctioning: material, flows, organization, etc.)
- Re-structuring
- Integration/Interoperation
- Evolution
- Conformity to standard (example: Quality)
- ...
- Define a common understanding

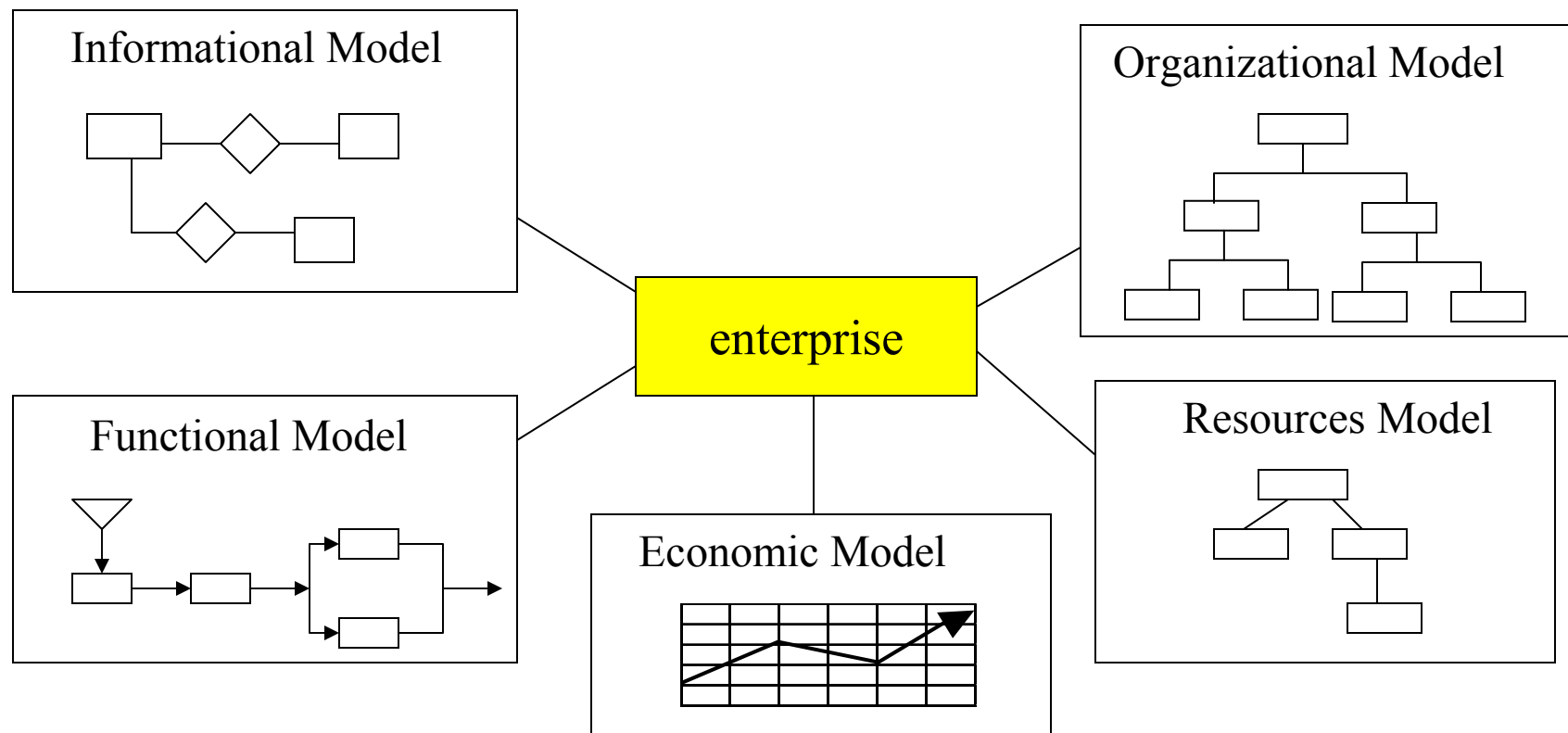
Enterprise Models: What is it?

- Describe the « things » of an enterprise
 - Functions
 - Behaviour
 - Information
 - Resources
 - Organization
- In order to
 - Understand
 - Evaluate
 - Optimize
 - Control
 - Simulate
 - etc.

- Representation (artefact)
- Multiple points of views
 - Operational,
 - Decisional,
 - Informational,
 - Strategic,
 - Economic
 - etc.

Enterprise Models

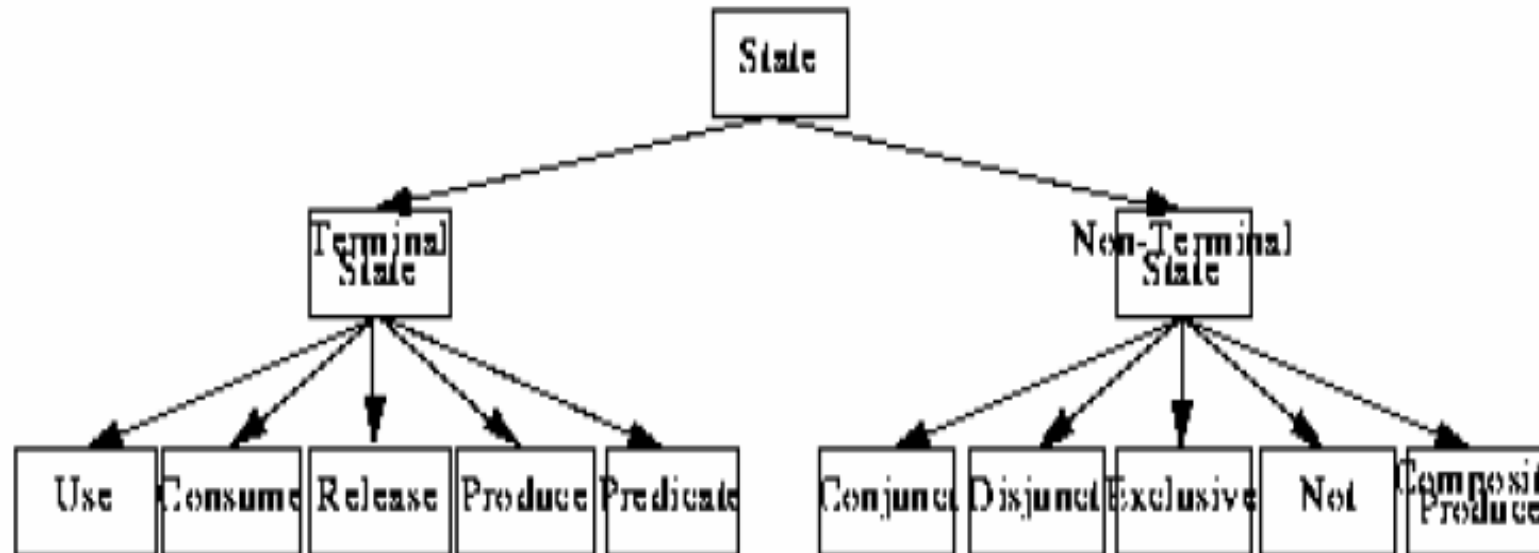
- Model or Models (F. Vernadat, CAiSE/EMOI, 2004)



- Diversity of the vocabulary
- Diversity of notations
 - Entity-Relationship
 - Objects (example: UML)
 - Petri net
 - Transition Diagrams
 - Logic(s)
 - etc.

- 70's (notations of model) :
 - SADT, Entity-Relationship, Semantic Network
- 80's:
 - Computer Integrated Manufacturing Methods: ICAM/IDEF, GRAI, etc.
- End of 80's: CIM Open System Architecture
- 90's:
 - ERP Deployment
 - Workflow systems
 - Object Orientation (IEM, UML, etc.)
 - Ontologies (IDEF5, TOVE, Enterprise Ontology, PSL, etc.)
- 2000's?: Semantic Interoperability ?

1. Time and actions
2. States
3. Resources
4. Others: product, organization, cost management



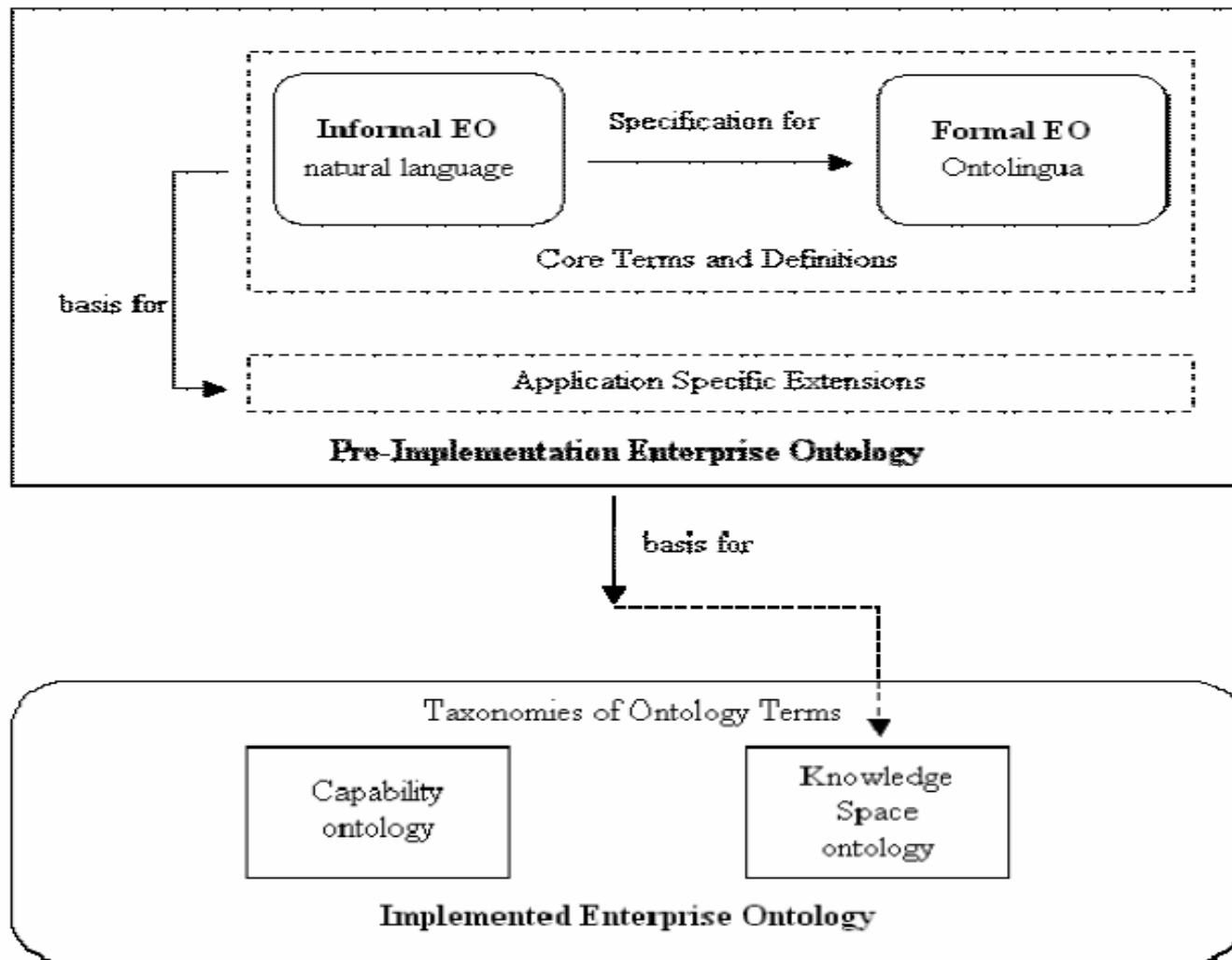
EO: Edinburgh Enterprise ontology

- 92 Classes
- 68 Relations
- 483 axioms
- 10 individuals

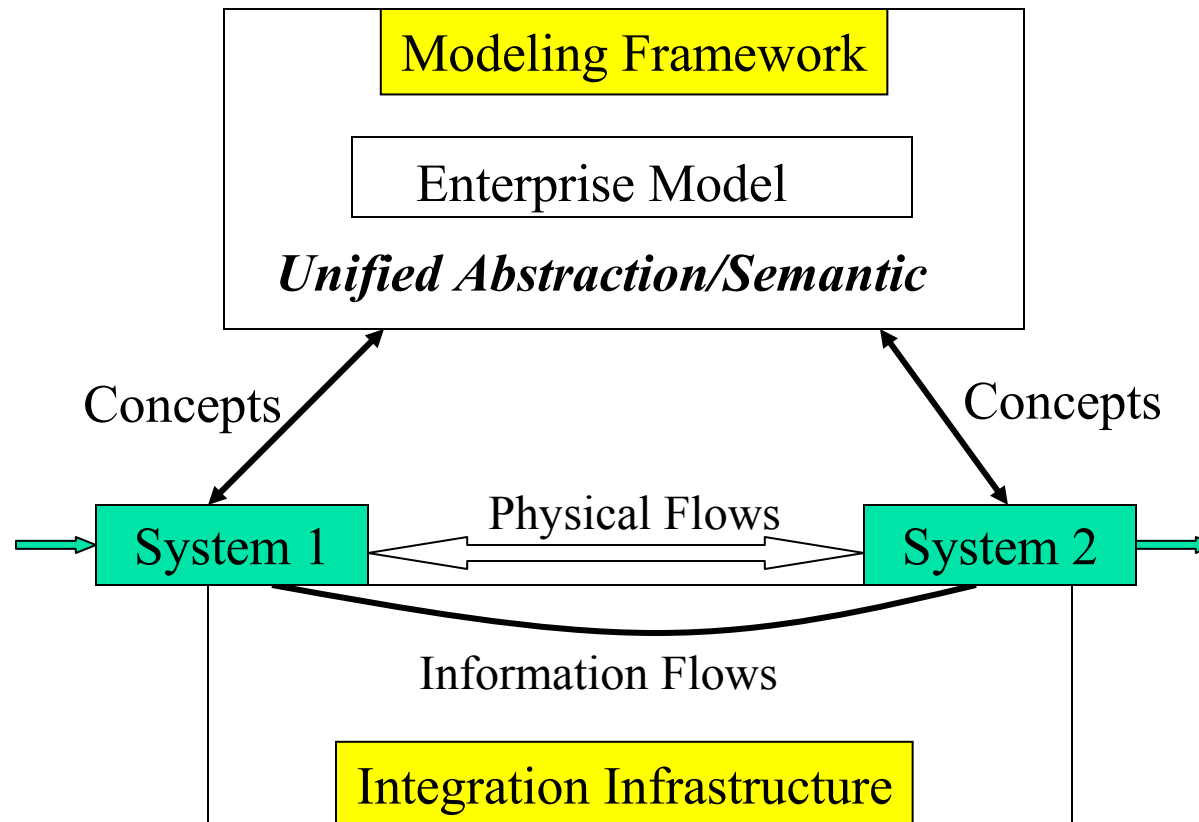
Enterprise ontology

<i>ACTIVITY, etc.</i>	<i>ORGANISATION</i>	<i>STRATEGY</i>	<i>II.3.4.6 MARKETING</i>	<i>II.3.4.7 TIME</i>
Activity	Person	Purpose	Sale	Time Line
Activity Specification	Machine	Hold Purpose	Potential Sale	Time Interval
Execute	Corporation	Intended Purpose	For Sale	Time Point
Executed Activity Specification	Partnership	Purpose-Holder	Sale Offer	
T-Begin	Partner	Strategic Purpose	Vendor	
T-End	Legal Entity	Objective	Actual Customer	
Pre-Condition	Organizational Unit	Vision	Potential Customer	
Effect	Manage	Mission	Customer	
Doer	Delegate	Goal	Reseller	
Sub-Activity	Management Link	Help Achieve	Product	
Authority	Legal Ownership	Strategy	Asking Price	
Activity Owner	Non-Legal Ownership	Strategic Planning	Sale Price	
Event	Ownership	Strategic Action	Market	

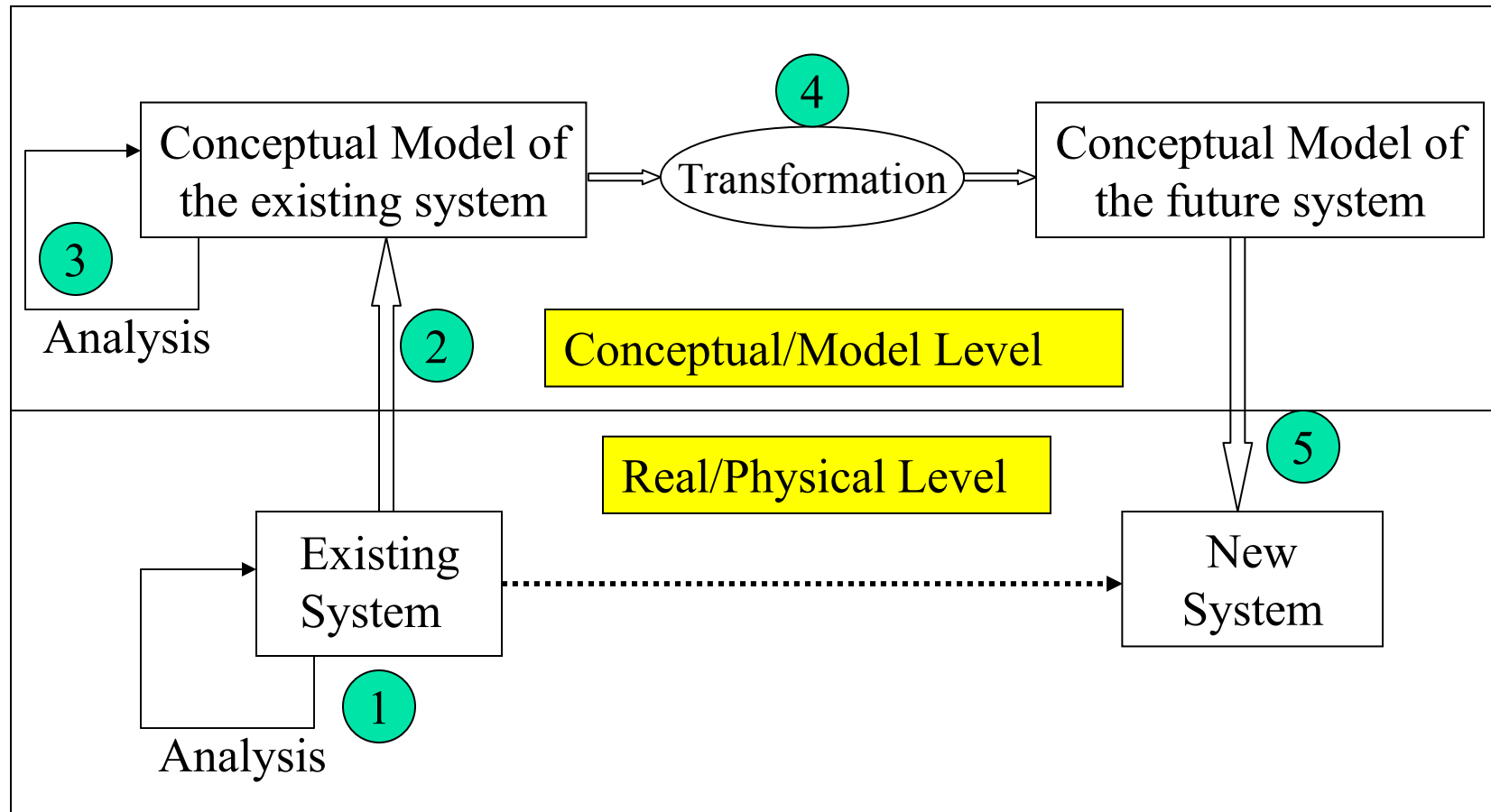
Enterprise ontology



How?



Modeling Process



Models, Instances and Annotations

Meta-model

Models for designing, describing, re-using,
Enacting, making evolve, ... models

***Generic/
Specific
model***

Types of activities, objects, roles,
Policies, ... which describe a model

***Model
Instance(s)***

Resources, Agents (machine, software, human), ...
for playing roles, for performing activities, etc.

***Instance(s) of
Enacted Models***

“Objects” resulting from activities,
describing resource consumption, activities
states and history, etc.

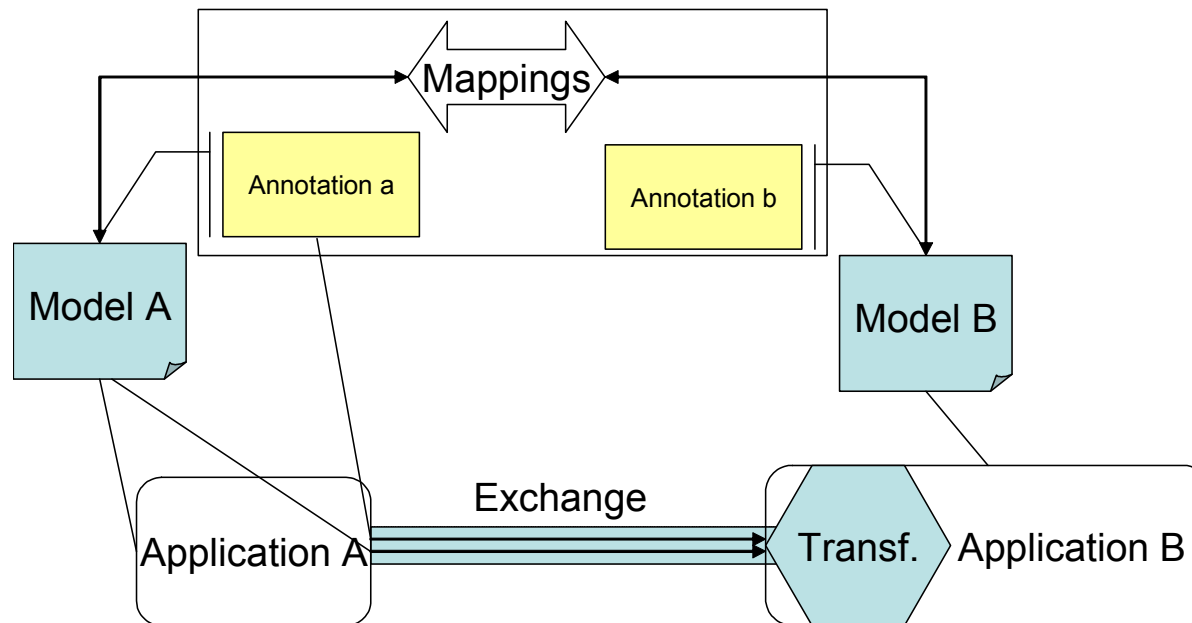
⇒ Intra-levels and inter-levels semantic enrichment

- « Co-existence » of concepts and « supports »:
 - For (meta-)modeling
 - For instanciating
 - For functioning (activation/enactment)
 - Integrated software systems (example: ERP)
 - Proprietary software
 - « House made » Software
 - etc.
- Cooperation and communication Purposes ⇒ interoperability
 - Intra-level
 - Inter-levels

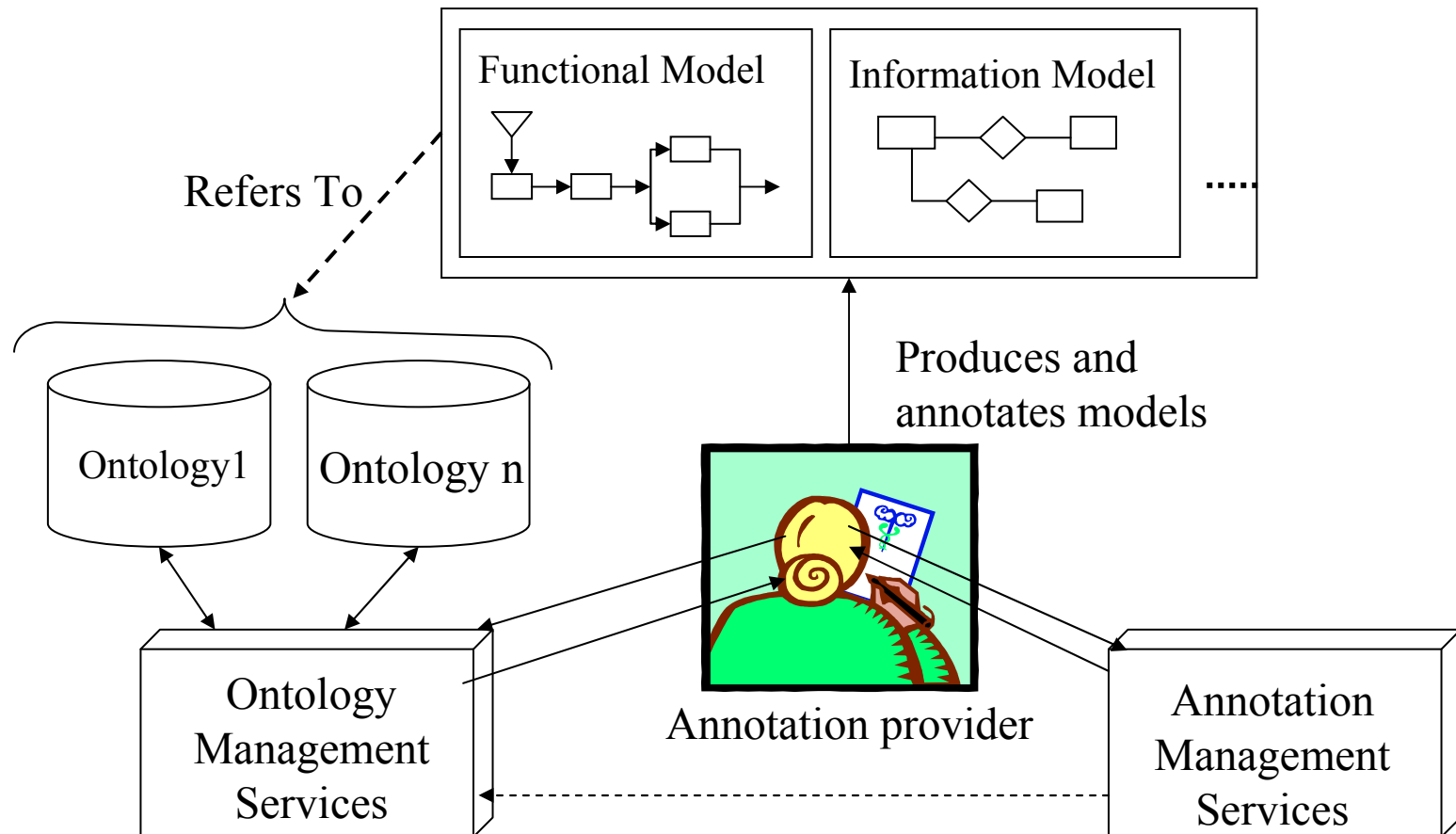
- Types, forms, ... of Semantic Annotations of Enterprise Models?
- Tentative Identification thanks to
 1. Literature (poor concerning enrichment of models)
 2. Case studies:
 - Various Perspectives of Models
 3. Common framework (Enterprise ontology, Enterprise Modeling and Ontology Management tools)

Purpose of Semantic Annotations of Models

- Model Exchange



What Types of Annotations and Services for EM?



- Types of Annotations

- Homogeneous environment
- Heterogeneous environment (tbd)

- Types of Services:

- Matching to the meta-model
- Matching to the ontology
- Annotation Checking (inconsistencies)
- Annotation storage and re-use
- Model exploration, querying
- ...
- To be cont'd

<Annotation

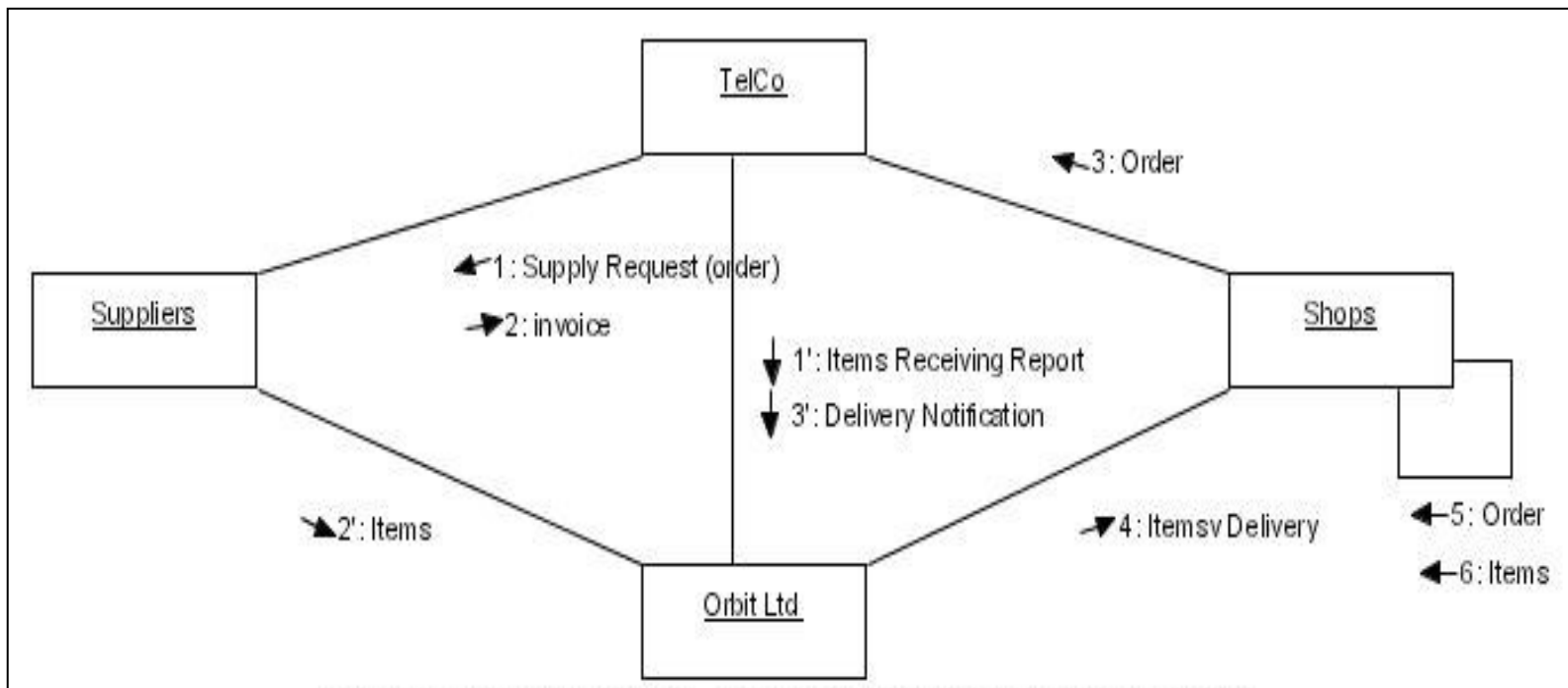
Type = (example: Decoration, Linking, Instance
Identification, Aboutness, Pertinence)

Ref2Ontology = (reference (uri) to the ontology
concept related to the current model concept)

Constraints = (may be written using OCL, with
references to the ontology, if this one is
represented by a UML class diagram)

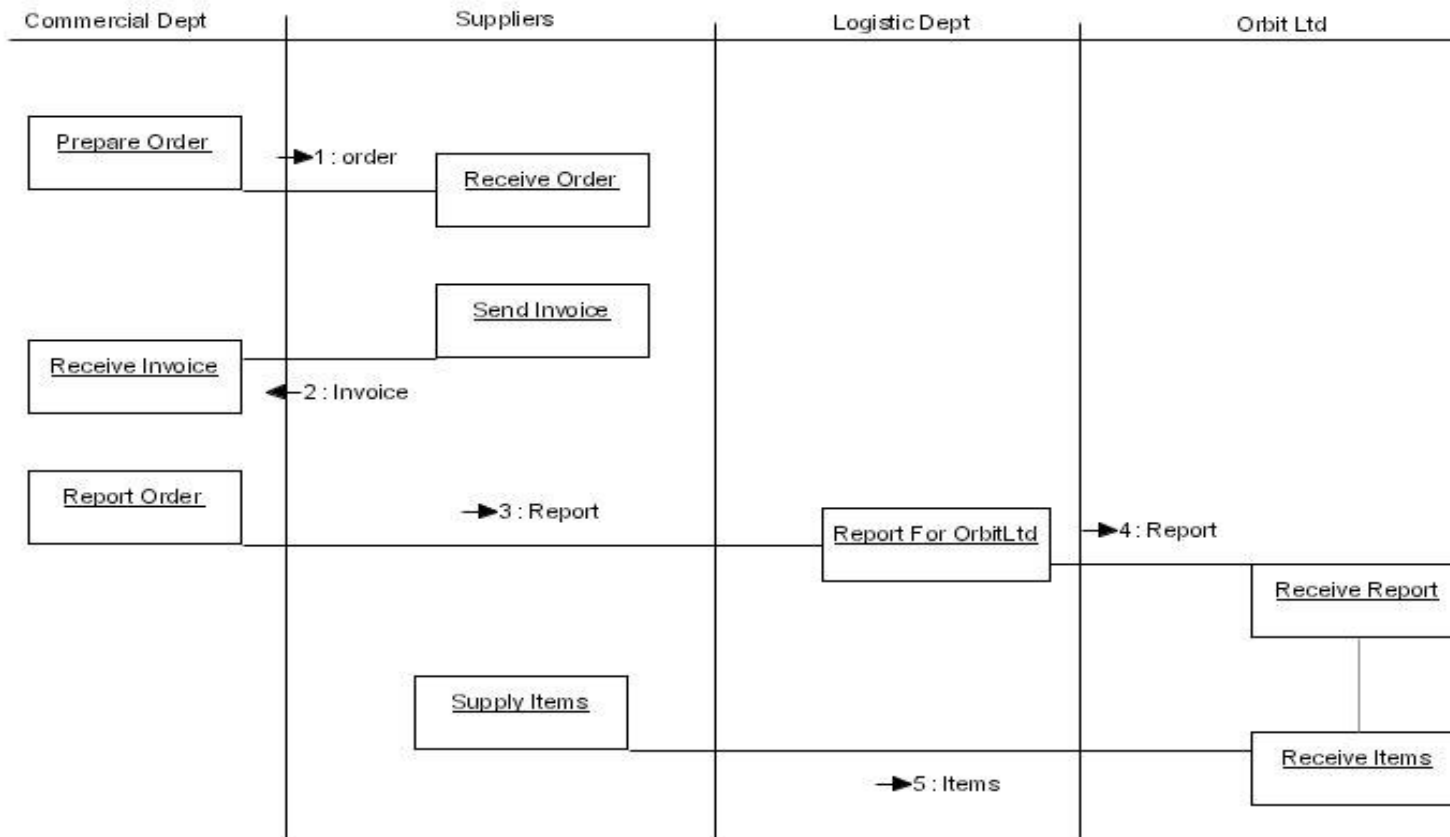
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Annotation Content: Example



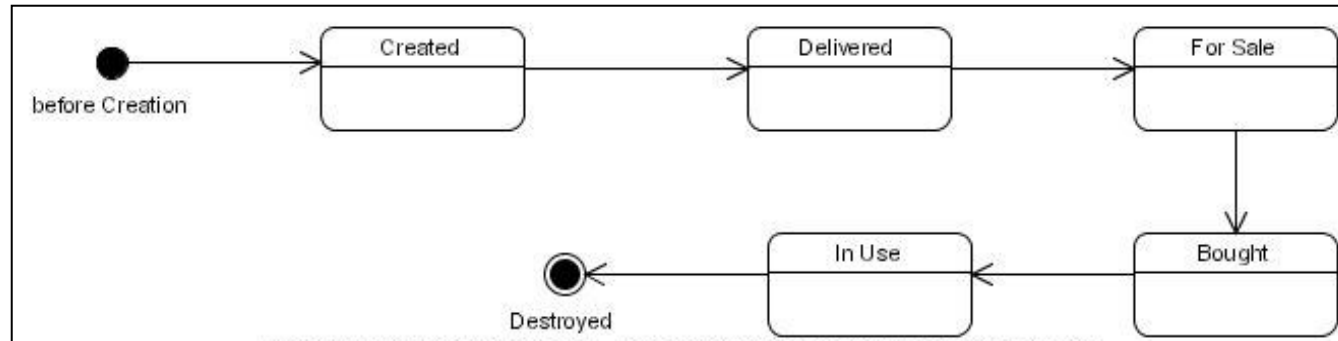
Items Receiving and Delivery Activity Diagram (in the studied enterprise)

Annotation Content: Example



Activity diagram of the process "Ordering & Receiving Items"

Annotation Content: Example



Items Receiving and Delivery Activity Diagram (in an Ontology)

<Annotation

Type = 'Instance identification'

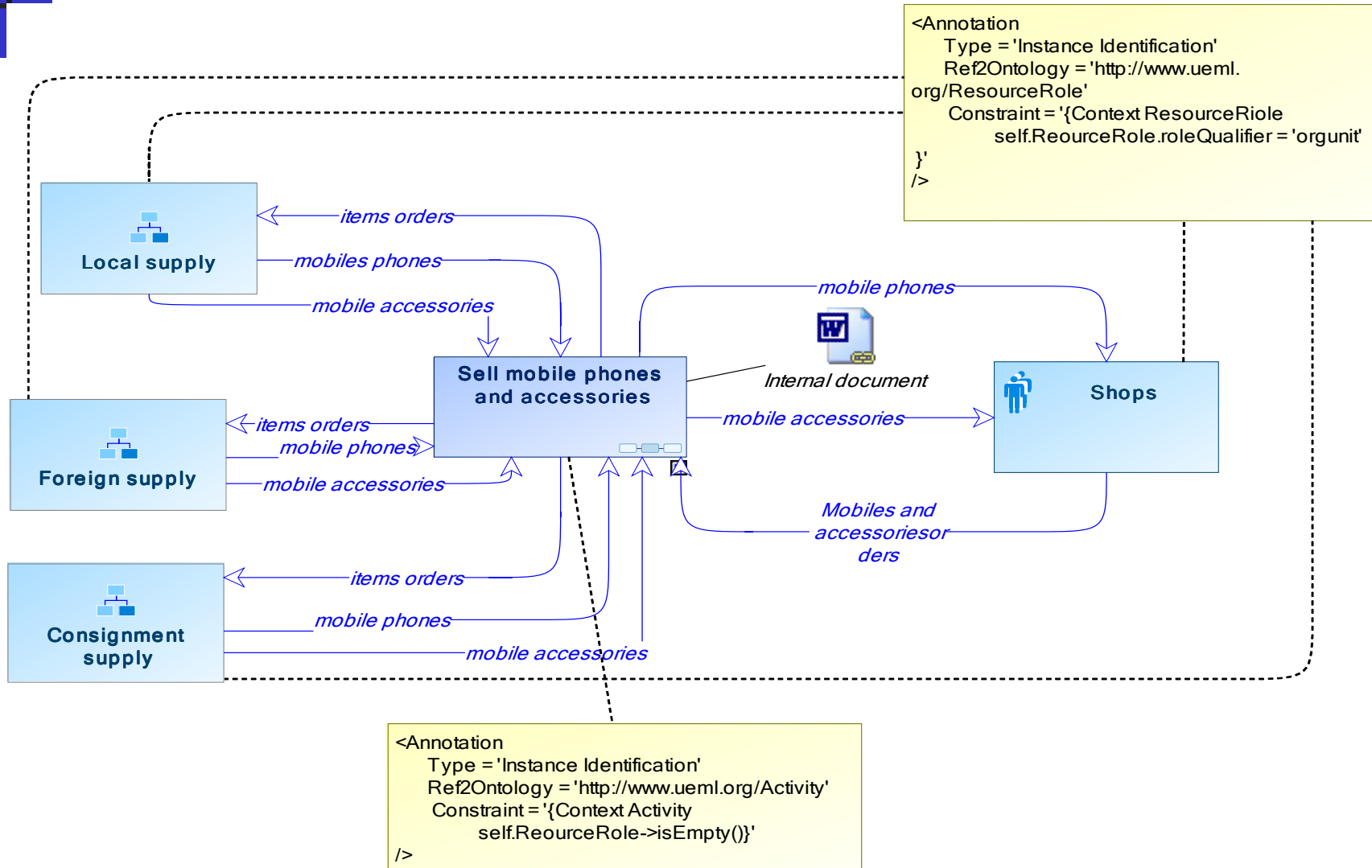
Ref2Ontology = 'http://www.ueml.org/Activity'

Constraint = '{Context Activity

Self. ResourceRole->isEmpty()}'

/>

Annotation Content: Example



Annotation Content: Constraints

- Equivalence
- Part-of
- Ad hoc

- EM annotation:
 - “Analytical” identification of annotation types
 - Expressed with reference to:
 - The EM tool
 - The provided ontology
 - No theory behind
- Open questions:
 1. Language(s) for semantic annotation of models?
 2. Annotation “content” (purpose, link to ontology, type of matching, link from the artefact to the modelled real world, ...)?

3. Adequacy/Completeness of existing services (Annotation provision and management)?

4. Impact on existing tools/environments?

- EM Exported in XML
- Explored and Annotated
- Later on:
 - offer "direct" annotation of models
 - Coupling/Integration of EM tools and
 - Ontology management services
 - Annotation management services

■ = Focus of the 2nd ENEI Intern'l workshop,
Sept. 2006, Vienna (@BPM Conference)

Thank you for paying attention

Questions?

Elements of bibliography

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