MetaPortal Final Report:

Building Ontological Hypermedia with the

OntoPortal Framework

Leslie Carr, Simon Kampa, Timothy Miles-Board

May 18, 2001

Contents

1	Introduction	4
2	Principles	5
3	OntoPortal version 1	g
4	OntoPortal version 2	12

	4.1	Overvi	iew of features	12	
5	Imp	lemen	ting OntoPortal2 - technical tour	14	
	5.1	Architectural overview			
	5.2	Migrating from OntoPortal version 1 to version 2			
		5.2.1	Problems with the version 1 data storage approach $$	23	
		5.2.2	Applying a database storage model to version $2 \ldots$	25	
		5.2.3	Data migration strategy	26	
	5.3	OntoP	ortal2 as a generic application framework	29	
		5.3.1	Defining a new ontology	29	
		5.3.2	Enforcing ontology structure onto data stored in database	34	
		5.3.3	Enforcing ontological relationships between resources .	34	
	5.4	Provid	ling a threaded discussion facility	36	
		5.4.1	Indenting discussion threads	38	
	5.5	5.5 Providing a search facility			
		551	Conoric searching	/11	

	5.6 Creating an offline distribution	45			
	5.6.1 An offline solution	46			
6	MetaPortal: An application of OntoPortal	48			
7	Related Work				
8	Further Work				
\mathbf{A}	OntoPortal Version 1 Screenshots	55			
В	OntoPortal Version 2 Screenshots	68			
\mathbf{C}	Resources	84			
	C.1 Contacts	84			
	C.2 Links	85			
Bi	Bibliography 8				

1 Introduction

This report details the OntoPortal project conducted for the Defence Evaluation and Research Agency (DERA), UK. The specification called for a well-interlinked and incrementally updateable web site detailing the latest research in metadata. The type of information to integrate included information on literature, projects, researchers, organisations, software and standards.

Due to the implicit relations evident between these resources (e.g. a research works on a project, literature discusses a project) an ontological hypermedia [10] philosophy was adopted, providing a principled and structured approach to navigation within the research portal.

The generic OntoPortal framework was developed to realise this methodology, and was used to create the MetaPortal web site for this project. The remaining report details both the features and technical details of framework and its MetaPortal application.

2 Principles

We investigated the use of ontologies to improve the linking of research literature together with the Web sites and home pages of related projects, institutions and individual researchers, by providing a principled way of describing both the topic under discussion and the process by which it was produced, in order to allow other researchers to better understand the work.

Ontology is the study of "things that exist", a formal model that allows reasoning over concepts and objects that appear in the real world.

Hypermedia is the study of "what can be said" using computer media, databases and links. Hypermedia provides computer mediated extensions to familiar textual communication. This is important because real-world objects, or the "things that exist", have complex relationships, and so complex structures are required for expressing and exploring these relations when we make hypermedia statements about them.

The design goal of an ontological hypertext system is then to produce a methodology for a building a hypertext system to improve the navigation facilities available to users through links that reflect real-world relationships rather than structural/hierarchical relationships. We wanted to take advantage of the features of both hypermedia and the Semantic Web [9] that are

not in widespread evidence on the WWW (such as large-scale associative linking, and the annotation of resources with metadata), and produce a semantic hyper-web of research information that encapsulates the knowledge required to become thoroughly immersed in a research field (in this case, the metadata research field). By modelling the domain of a research field using an ontology, a hypertext system has the power to intelligently communicate, analyse and reason over the knowledge.

Our design further specifies that rather than keeping this underlying ontological data model hidden from the user, we promote it to the forefront of the interface for exploring the research field that it encapsulates. Figure 1 illustrates how the user is always aware of their location within the ontology and how the currently viewed concept is related to the rest of the community. On the left in Figure 1, the user is currently viewing literature (indicated by the reverse-video icon labelled Lit). Its relation to the rest of the community is indicated by highlighting the related nodes. As the user moves through the ontology, the diagram changes to reflect the new context (Figure 1, right).

Using the ontology in the interface layer is possible as we have ensured that it is relatively uncomplicated, focused and intuitive. Using an ontology as a navigation tool has many advantages, as both typed links and a fixed linking structure are enforced. Named relationships between ontological concepts

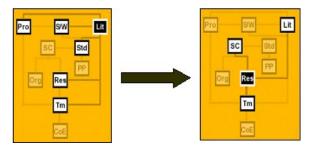


Figure 1: Using the MetaPortal ontology as a navigational cue

naturally provide a link taxonomy from which the interface can derive presentation techniques for displaying different link types. These relationships also restrict the range of permitted links between different concepts. Using the underlying ontological model as a navigational metaphor also enforces bi-directional linking between related concepts, and n-ary links in the case that the ontological model contains a one-to-many relationship.

Ontological navigation also allows users to effectively answer queries using a "query-by-linking" approach (rather than the more traditional "query-by-searching" approach), using facts that they are able to assert in order to discover new facts through exploration. For example, a user having just read a research paper describing a particular standard wishes to find out whether any other papers describe the standard, perhaps with contrasting viewpoints. Using WWW and Digital Library technology as it stands, resolving this type of query usually involves resorting to searching for similar papers using (possibly) several search engines ("query by searching"). However, using ontolog-

ical navigation, the researcher can realize this query quickly and effectively by exploring the *now* explicit link between all research papers that describe the standard ("query by linking").

3 OntoPortal version 1

The objective of the first OntoPortal system was to realise the principles of ontological hypertext and demonstrate their benefit in a real-world scenario. We derived an ontology to describe the domain of metadata research that was both comprehensive enough to capture the field, yet simple enough to be quickly grasped by users and employed as an interface tool.

The ontology was constructed through discussions with various researchers and from experience in work within the IAM Research Group. The focal elements of interest to researchers, as well as the relationships between them, were identified and formally visualised (Figure 2).

Each node in Figure 2 represents a *class*, a tangible "real-world" concept with which researchers are familiar. Multiple relations exist between the classes.

Knowledge about the metadata research domain is captured using a simple HTML forms interface. Each form provides fields for authors to enter the properties of an ontological instance (e.g. title, description). Authors can describe relations between class instances by indicating which other class instances are associated. OntoPortal uses the data entered to create suitable XML fragments and stores each instance in a unique file.

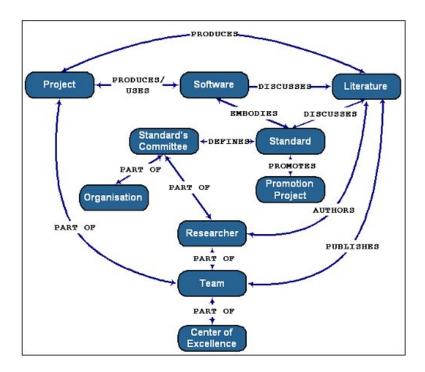


Figure 2: The MetaPortal Ontology

Although XML is by no means entirely suitable for describing ontological instances (RDF Schema and OIL being better candidates), it is expressive enough to describe our simple ontology. Furthermore, the abundance of publicly available XML tools, and the possibility of using XSLT to convert the XML records into a suitable presentation form (e.g. HTML), convinced us to adopt XML.

A research area can be comprehensive and difficult to dissect if presented in one collection. Therefore, we decided to allow the creation of subject areas (or themes) within any topic (e.g. Introduction to Metadata or Semantic Web and Metadata). It is within each theme that ontological hypertext principles are applied to its constituent instances.

To capture the experience of our theme populators, simple peer level commentary facilities were added, enabling authors to add an opinion (their personal thoughts on that class) and an analysis (an examination of that instance).

Screen shots of this version of OntoPortal are displayed in appendix A.

OntoPortal version 1.0 was relatively simple and was produced more to investigate the methodology than to populate a substantial database of knowledge about metadata research. Consequently there were several inherent problems. As the file system was being used to store the classes, file system limitations caused scalability problems. Provisions for handling duplicate classes in different themes also proved difficult. Forcing the client side to deal with the XSLT processing not only slowed down the display of pages, but also alienated users of non-XSLT enabled Web browsers.

The next section describes how OntoPortal version 2 builds on the theoretical foundations layed out in OntoPortal version 1 and overcomes the inherent problems.

4 OntoPortal version 2

After the implementation of OntoPortal version 1, it was clear that the next major implementation stage, OntoPortal version 2 (hereon referred to as "OntoPortal2") needed to be able to address the problems of version 1: namely scalability, data integrity and overall performance, as well as providing support for evolving ontological needs (this requirement eventually led to the implementation of OntoPortal2 as a generic portal framework on which portal applications could be built).

4.1 Overview of features

This section briefly discusses the major features of OntoPortal2, and provides pointers to implementation details in Section 5.

The migration of the data gathered using the OntoPortal version 1 system to a scalable database-based architecture (see Section 5.1) solves many of the problems inherent in the version 1 data storage model (see Section 5.2). Perhaps most importantly, resources are able to be represented in different contexts across many themes without duplicating the underlying data describing the resource. When entering information about resources, theme populators are able to "import" a resource description from another theme,

and describe its relationship and commentary relevant to the theme's context.

An important feature of OntoPortal2 is it that it is implemented as a generic framework, onto which an application can be built according to the ontological needs of the domain to be modelled (see Section 5.3). MetaPortal is just such an application - it uses the OntoPortal2 framework to model the domain of metadata research by providing an ontological model of the concepts and relationships in the domain, and presentation rules for the display of the capture information about the domain.

Future applications of the OntoPortal2 framework include the ontological modelling and knowledge capture of the resources surrounding the members of the IAM Research Group at the University of Southampton, UK.

As well as knowledge capturing facilities, the OntoPortal2 framework also provides discussion (Section 5.4) and search (Section 5.5) facilities.

The dynamic data retrieval and presentation architecture of OntoPortal2 applications makes it difficult to distribute the captured knowledge to offline users. The OntoPortal framework therefore also includes a facility for generating a static HTML "snapshot" of the domain being modelled (see Section 5.6).

5 Implementing OntoPortal2 - technical tour

5.1 Architectural overview

This section examines the architecture of the OntoPortal2 system, describing the features illustrated in the architectural overview diagram (Figure 3).

The user interacts with the OntoPortal2 system through a WWW browser, placing no constraints on the browser other than it must support JavaScript in order to take advantage of the ontological navigation tool. The user is able to interact with the system through four discrete "interfaces" (CGI scripts implemented in the perl scripting language) - Explore, Update, Search, and Discuss.

The Explore interface allows the user to browse the ontologically-linked resources in the OntoPortal2 database. The user can also supply username/password credentials through the Explore interface, which results in the resources being browsed being decorated with additional links into the Update interface. Following these links allows the currently displayed resource to be edited, or an entirely new resource to be created. Appropriate username/password credentials (or an authentication cookie from a previous successful login) also result in the Explore interface providing links from each resource into

the *Discuss* interface, allowing the user to browse and participate in any threaded discussions surrounding the resource (see Section 5.4 for a more detailed explanation of the Discuss interface).

The Explore interface also contains an entry point to the *Search* interface, allowing the user to query the resources stored in the OntoPortal2 database for specified terms (see Section 21 for a more detailed explanation of the Search interface).

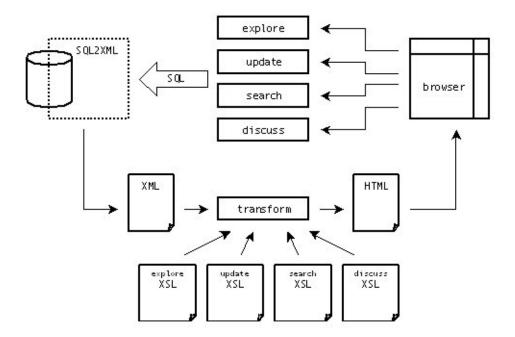


Figure 3: OntoPortal2 architectural overview.

All four interfaces carry out user requests by translating the request parameters into a number of SQL statements, which are then executed across the database using the SQL2XML module. This module was specially developed

to wrap the results of SQL queries in an XML format. The specifics of this conversion are controlled by arguments passed to the SQL2XML module. All communication with the database is carried out through the Database Independent (DBI) standard. This means that although the OntoPortal2 system currently uses the MySQL database [4], any database can be substituted with minimal effort.

The resulting XML document is then transformed using an appropriate stylesheet into an HTML document which is sent back to the user's browser. Figures 4 and 5 demonstrate this process. XSLT transformations are carried out using the Microsoft XSL transformer (MSXSL3) [3], chosen for its impressive throughput capabilities. Since this transformer is invoked through the Microsoft Windows dependant COM interface, provisions have been made to allow other XSLT transformers to be "slotted in" in its place (for example, a slot-in replacement has been implemented for the Xalan XSLT transformer [5], to allow transformations to be carried out under the Linux environment). The OntoPortal2 architecture is advantageous in that it clearly separates the data held in the database from its presentation. Combined with the "generic ontology" feature (see Section 5.3), this results in a generic application framework, which can be tailored to a particular application (for example, Meta-Portal) by defining an ontology, and (XSLT) presentation rules specific to

that application.

The architecture also allows a user centric, adaptive interface to be constructed. Figure 6 shows how the same XML data is transformed to its presentation format according to different user parameters. Users with no authentication (for example, casual users) are presented with limited interactivity. Registered users are presented with an augmented interface and may take part in threaded discussions. Finally, editors are presented with the highest level of interactivity, and may actually alter the content of the database.

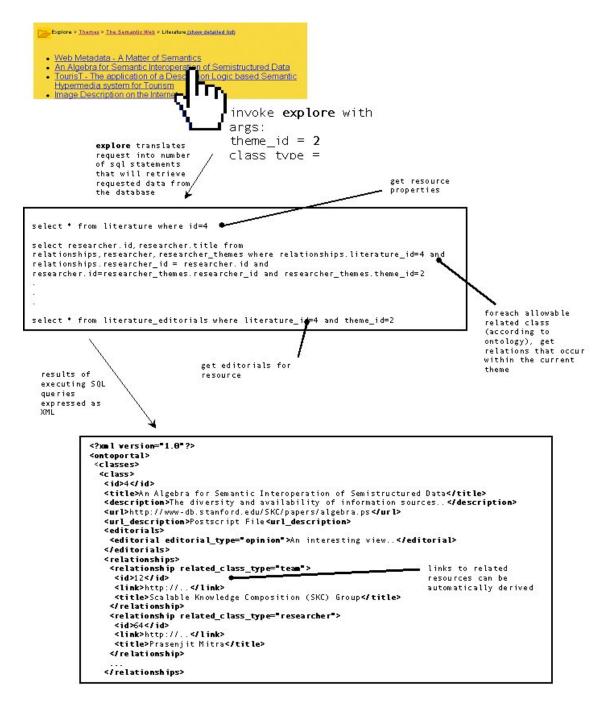


Figure 4: The user makes a request through the Explore interface, which is translated into a series of SQL queries. These queries are executed across the database, resulting in an XML document describing the requested data. This XML document is then transformed into a presentation format (Figure 5).

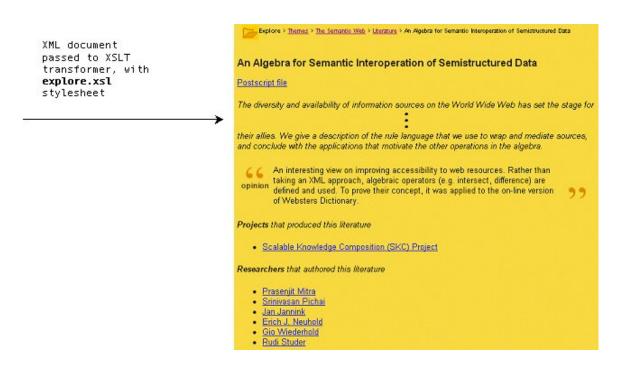


Figure 5: The XML document resulting from user interaction with the Explore interface 4 is transformed into a HTML presentation format using an XSLT stylesheet.

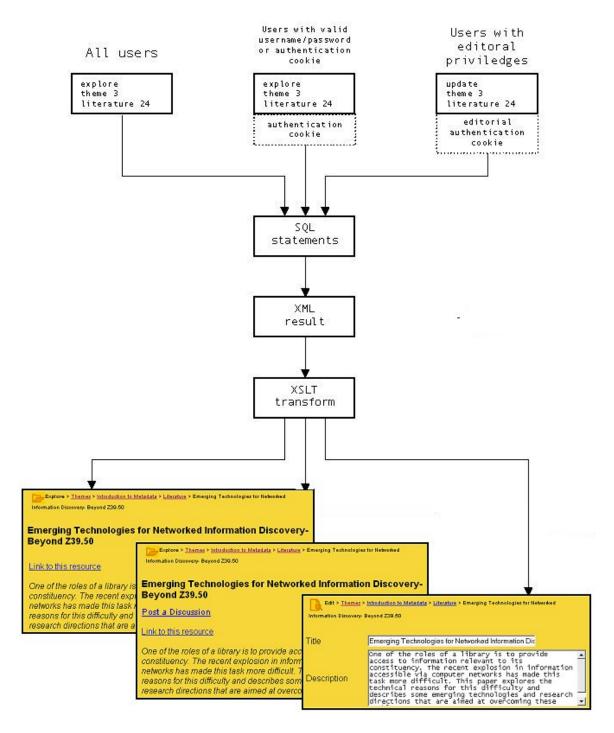


Figure 6: The same XML data is transformed in a user-centric fashion according to the user profile.

5.2 Migrating from OntoPortal version 1 to version 2

We have already seen that the data storage mechanisms used in OntoPortal versions 1 and 2 are significantly different. This section briefly outlines the migration process which was designed and carried out in order to populate the version 2 database with the data already harvested and stored in the version 1 data file hierarchy.

The data file hierarchy of OntoPortal version 1 (Figure 7), consists of a directory for each theme (derived directly from the name of the theme), and contains subdirectories for each resource type defined in the ontology. Within each of these resource subdirectories, a data file is stored for each resource record, with the name of the resource used as the filename of the data file (The name of the resource also serves as the unique identifier for that resource). The data files describing the themes themselves are stored in the top level directory of the hierarchy, again with the name of the theme dictating the filename under which the theme data files are stored.

The use of resource names as unique identifiers is demonstrated in Figure 8, where relationships between the resource titled "Review of Metadata Formats" are identified by recording the names of the related resources. Following this storage model, each of the data files describing the resources "Dublin

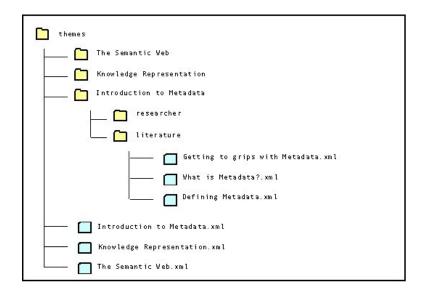


Figure 7: The data file hierarchy of OntoPortal2 version 1. In this example, the system stores information about resources classified into three themes, The Semantic Web, Knowledge Representation, and Introduction to Metadata. Information describing each of these themes is stored under the appropriately named data file at the top level of the hierarchy (in a well-defined XML format). A directory is also created for each theme, which contains a subdirectory for each resource type (Introduction to Metadata theme directory shown expanded); in this case the defined resource types are researcher and literature. Records of resources corresponding to these resource types are stored in well-defined XML data files within these resource subdirectories (literature shown expanded); in this case three (literature) resources relevant to this theme have been described - Getting to grips with Metadata, What is Metadata?, and Defining Metadata.

Core", "Rachael Heery", and "ROADS team" will contain a reference to the "Review of Metadata Formats" resource in their relations construct.

Figure 8: Example of XML data file format used to describe themes and resources.

5.2.1 Problems with the version 1 data storage approach

A number of problems arising from the nature of the data file hierarchy have become apparent during the development of OntoPortal version 1. The use of filenames as unique identifiers for resources was found to be particularly problematic - since every operating system prohibits certain characters appearing in filenames, a platform-dependant encoding/decoding process had to be applied to resolve the filename of the file containing the data from the unique identifier for a particular resource and vice versa. Furthermore, the restriction of filename length in many operating systems also had to be taken into consideration, meaning that filename truncation and reconstruction also had to be dealt with by the encoding/decoding process in the case that the name of a resource (and thus its unique identifier) exceeded the character limit. The truncation of filenames may also potentially lead to clashes,

where more than one "unique" identifier is resolved to the same physical data file.

Furthermore, the need to sequentially access and process the XML data files in the hierarchy limited the scalability of the system - a distinct degradation in access speed was noticeable as the number of resources stored in the system increased.

The strict subdivision of resources into directories corresponding to themes also proved unwieldy, particularly if a resource was appropriate to more than one theme. In this instance, a duplicate record had to be made in each relevant theme subtree. Since the system provided no warning if an author added a resource that had already been described as part of another theme, duplicate resources were often found to contain different data compared to descriptions of the same resource in other themes.

Figure 8 has highlighted the method used to describe relationships between the resources, where a record of the existence of the relationship is stored by each resource participating in the relationship. We found that this approach led to higher maintenance, particularly in the avoidance of "dangling relationships" when relationships or resources are deleted.

5.2.2 Applying a database storage model to version 2

In the context of the data file hierarchy of version 1, we reasoned that problems with using resource names as unique identifiers could be resolved by assigning unique id values to resources and using these id values as filenames. This would also solve the problem of long resource names having to be truncated in order to derive a filename for the corresponding data file.

Rather than being held by each participating resource, relationships between resources could be managed separately to resource data. For example, a single file that contains all resource relationship information could be used. However, accessing this potentially enormous file each time resource relationships needed to be determined would result in a performance bottleneck.

Finally, duplicate resource information could be avoided by using symbolic links files in other theme subtrees. However, not all environments (e.g. Microsoft Windows) support this approach.

It was observed that the overhead required to manage resources in this way could be reduced considerably by using a relational database system. The assignment of unique ids to records is managed automatically by the Database Management System (DBMS). SQL queries are used to quickly and efficiently retrieve information about resources. Information about relationships

between resources is stored separately from the resource data (i.e. in a separate table), and accessed efficiently using SQL queries. The duplication of information is also explicitly avoided through the data normalisation process that is an important stage of database design.

5.2.3 Data migration strategy

The migration of data from the data file hierarchy storage model of version 1 to the relational database storage model of version 2 was carried out as follows:

- 1. Construct database according to existing ontology used to define resource types and properties in version 1 (see Section 5.3 for further details).
- 2. Transform all XML resource data files into single CSV (comma separated value) files, using XSLT stylesheet. A single CSV file should be created for each type of resource.
- 3. Identify, and manually resolve duplicates during the transformation process (see Figure 9).
- 4. Assign integer id values to all resources and themes, such that a (theme_id,class_type,class_id

key uniquely identifies a resource (i.e. the id value is unique within a particular resource type).

- 5. Import CSV files into database.
- 6. Data now available to scripts which access database.



Figure 9: Transforming individual resource data files into single CSV files for importing into the database. When a duplicate resource is identified, the interactive transformation process displays the conflicting properties (in this case, three resources entitled "World Wide Web Consortium (W3C)" have been identified in three different themes, and the administrator is prompted to interactively merge the data into a single record).

5.3 OntoPortal2 as a generic application framework

OntoPortal2 provides a generic application framework for modelling information domains. Section 5.1 demonstrated how the nature of the OntoPortal2 architecture provides a generic application framework that can be tailored to a particular application by defining an ontology which models the domain to be captured, and defining application-specific user interface presentation rules.

5.3.1 Defining a new ontology

OntoPortal2 currently supports only the simplest ontological modelling concepts. Modelling techniques such as subsumption (i.e. inheritance), facets, cardinality, and axioms are not supported. A domain must therefore be described in terms of the basic, non-hierarchical, ontological model shown in Figure 10. The target domain is divided into a number of *themes*, which represent distinct research areas. Each theme contains a number of resources or *classes*, classified by type, equating to real-world resources.

To describe the purpose and content of a particular theme (OntoPortal2 presents this information as introductory material to the resources contained within), the properties common to all themes can be defined in the ontology.

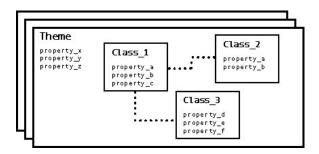


Figure 10: Basic structural model for knowledge capture using OntoPortal2

These properties may include single and multi-value properties, and may be assigned user-defined types. Similarly, the properties common to each type of resource can be defined in the ontology. The ontology also makes explicit the permitted relationships between the different resource types.

Figure 11 illustrates a simple ontology which might be used to model a research domain. Themes contain the properties title and description, and may have many related links. Each theme may contain a number of resources, classified as either Researchers or Literature. We wish to capture the name, description, and email of influential researchers in the research domain, and the title, abstract, and url of any relevant online literature. We also want to capture the relationships between Researchers and Literature (in this case, the simple relationship between a paper and its authors), and any editorial comments added by data harvesters as these literature resources are identified.

The steps required to build a domain-modelling application from the On-

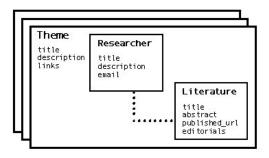


Figure 11: Example Ontology definition

toPortal2 framework using this example ontology are described below, and illustrated in Figure 12:

- 1. Describe ontology using schema-like XML notation (see Figure 13).
- 2. Apply XSLT stylesheet to ontology definition to transform definition into an XML 'database description'. This 'database description' describes the tables making up the relationship database that needs to be built in order to capture the knowledge in the domain modelled by the ontology (see Figure 14). Note that each table in the database description automatically receives an id field these store the unique identifier assigned to each theme, resource, relationship, and user-defined type.
- 3. Translate 'database description' into series of SQL statements which actually construct the tables in the database.



Figure 12: Database construction

```
<ontology>
     <themes>
     </themes>
  <classes>

        </relations>
     </class>
     <class type="literature">
       <related_class type="researcher"/>
        </relations>
     </class>
  </multi_value_properties>
</ontology>
```

Figure 13: XML description of ontology described in Figure 11

```
<db name="imdp">

        cfield name="id" type="INTEGER" primary_key="yes" auto_increment="yes" />
<field name="theme_id" type="INTEGER" />
<field name="title" type="TINYTEXT" />
<field name="url" type="TEXT" />
    <field name="id" type="INTEGER" primary_key="yes" auto_increment="yes" />
<field name="theme_id" type="INTEGER" />
<field name="literature_id" type="INTEGER" />
    ole name="researcher">

<field name="id" type="INTEGER" primary_key="yes" auto_increment="yes" />

<field name="title" type="TINTTEXT" />

<field name="description" type="TEXT" />

<field name="email" type="TEXT" />

</table
         <field name="id" type="INTEGER" primary_key="yes" auto_increment="yes" />
<field name="theme_id" type="INTEGER" />
<field name="researcher_id" type="INTEGER" />
    <field name="id" type="INTEGER" primary_key="yes" auto_increment="yes" />
<field name="literature_id" type="INTEGER" />
<field name="researcher_id" type="INTEGER" />
    </db>
```

Figure 14: XML 'Database description'; derived directly from ontology definition in Figure 13

5.3.2 Enforcing ontology structure onto data stored in database

The ontology from which the database is derived explicitly enforces singleand multi-valued property names and types of both theme and class properties - the fact that the ontology description is used to generate the database ensures that all properties and types are reproduced in the database. In the same way, the ontology explicitly enforces the permitted types of resource in the database.

5.3.3 Enforcing ontological relationships between resources

The ontology enforces relationships between resources, by acting as a mediator when new resource descriptions are added to the database, ensuring that only permitted relationships between the new resource and resources already in the database can be asserted.

We implemented a module which provides information about the ontological structure of the domain being modelled by consulting the ontology description directly. This module, OntoReader, is described in more detail in Figure 15. The getClassRelationships() method can therefore be used to determine the permitted ontological relationships between newly added resources and existing resources in the database.



 $\begin{tabular}{ll} \textbf{getThemeProperties (opt)} & returns theme properties (opt specifies all properties, single-value properties only, or multivalue properties only) \\ \end{tabular}$

getClassProperties (class_type, opt) returns class properties for class_type (opt specifies all properties, single-value properties only, or multi-value properties only)

 ${\bf getUDTProperties} \ ({\bf udt_type}) \quad {\bf returns} \ {\bf properties} \ {\bf of} \ {\bf user} \ {\bf defined} \ {\bf type} \ ({\bf UDT}) \ {\bf udt_type}$

 $\textbf{getClassRelationships (class_type)} \quad \text{returns allowable ontological relationships between class_type and other classes}$

getClassTypes () returns all class types in ontology

 ${\tt getThemeIndex}$ () $\,$ returns database index for full-text searching of themes

 ${\tt getClassIndex\ (class_type)} \quad {\tt returns\ database\ index\ for\ full-text\ searching\ of\ class_type}$

 $\mathbf{getUDTIndex} \ (\mathbf{udt_type}) \quad \mathbf{returns} \ \mathbf{database} \ \mathbf{index} \ \mathbf{for} \ \mathbf{full_text} \ \mathbf{searching} \ \mathbf{of} \ \mathbf{user} \ \mathbf{defined} \ \mathbf{type} \ (\mathbf{UDT}) \ \mathbf{udt_type}$

Figure 15: The OntoReader module provides a means of consulting the ontological structure of the domain being modelled, in order to ensure that this structure is enforced in the database.



Figure 16: Tables used to store information about discussion threads in the database. Details of the messages posted to the discussion threads are stored in the discussions table. The discussion_seeds table provides the context for the discussion, by recording the theme id, class type, and class id of the resource each message discusses.

5.4 Providing a threaded discussion facility

We have already seen that the Explore interface augments resources with links to discussion threads when registered users interact with the system (Section 3). This section describes the implementation of the threaded discussion facility in more detail.

Any resource stored in the system can potentially act as impetus for debate (Figures 17 and 18). Information about messages posted by registered users to the discussion threads are stored in two tables in the database - these tables are constructed automatically when the database is built from the ontology description file (Section 5.3). The messages themselves are stored in one table, and the other table is used to join each message to the resource which it discusses (Figure 16).

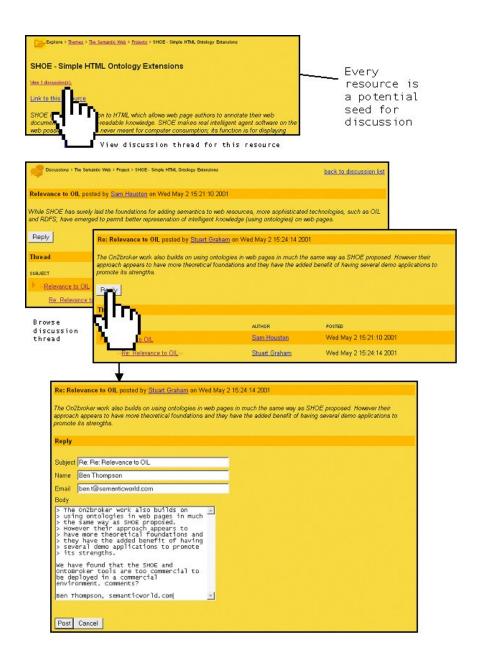


Figure 17: Any resource in the system can potentially act as an impetus for discussion. The Explore interface provides entry points into the discussion threads for each resource. The discussion threads can be browsed, and messages can be posted in response to previous postings or posted as a new thread to initiate a new direction of discussion.

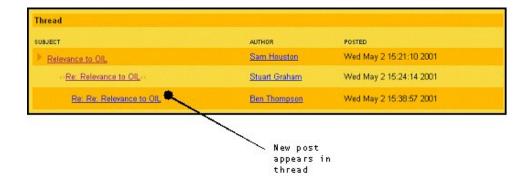


Figure 18: Result of posting a message to the discussion thread in Figure 17

5.4.1 Indenting discussion threads

In the presentation of discussion threads, we wanted to achieve the "indented list" style used by many online discussion forums, where a message posted in reply to a previous message is indented further to the right than its predecessor. The solution came when we considered the XML representation of a discussion thread (Figure 19).

Figure 19: XML description of a discussion thread, generated in response to a request to view the discussion threads surrounding a particular resource in the database.

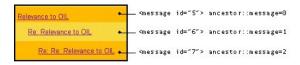


Figure 20: Discussion thread presentation, with message subjects appropriately indented according to their position in the discussion.

The logical hierarchical structure of the discussion thread suggested that we could use the axis ancestor to collate the ancestor message nodes of any particular message node in the structure. For example, if we are at node <message id="7">, ancestor::message would return a node set containing the nodes <message id="6"> and <message id="5">. The XSLT creates the appropriate indentation for each message in the thread as follows, by inserting a number of small "spacer" images before each message header:

Figure 20 shows the resulting presentation of the discussion thread.

5.5 Providing a search facility

We have already seen that the Explore interface provides an entry point to the Search interface, allowing the user to query the resources stored in the OntoPortal2 database for specified terms (Section 3) - Figure 21 illustrates this entry point, and resulting interaction with the Search interface. This section describes the implementation of the search facility in more detail.

In order to allow full text searching across the resources in the database, we needed to index the tables in the database, according to which particular resource properties we wanted users to be able to search. We decided to allow the ontology definition to define which properties should be used to construct the full text search index for each resource (Figure 22).

5.5.1 Generic searching

In order to perform a full-text search across a database table, the following SQL syntax is applied:

SELECT fields FROM table WHERE MATCH (index) AGAINST (terms)

(where index is a comma-separated list of the fields in the making up the index). Example SQL queries in the context of a database constructed from

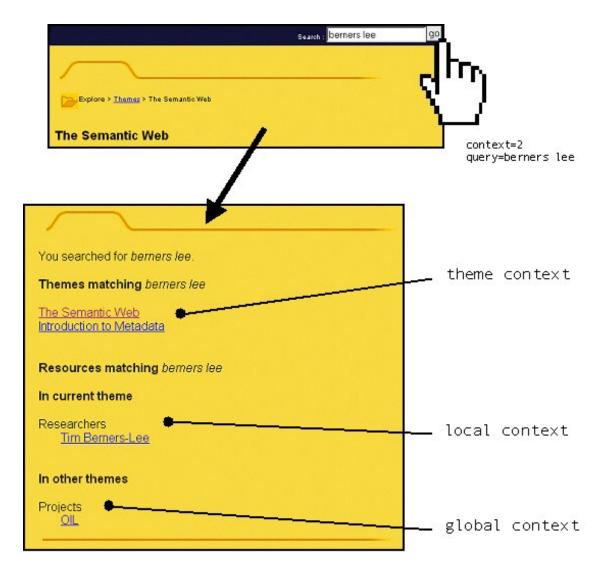


Figure 21: The entry point to the Search interface appears in all interactions with the Explore interface. By entering search terms, the user can quickly find relevant themes, and local (within the current theme) and global (across the whole database) resources.

```
<ontology>
   <themes>
      properties>
          </themes>
   <classes>
      <class type="researcher">
          properties>
             cyroperty name="title" type="TEXT" index="yes"/>
cyroperty name="description" type="TEXT" index="yes"/>
cyroperty name="email" type="TEXT"/>
          </properties>
<relations>
             <related_class type="literature"/>
          </relations>
      </class>
   </classes>
   <user_defined_properties>
       <user_defined_property name="resource">
         </user_defined_property>
   </user_defined_properties>
```

Figure 22: Example ontology definition augmented with index attributes where a property is to be included as part of the full text search index for that resource. In this example, themes will be indexed using the title and description properties, researcher resources will be indexed using the title and description properties, and the user-defined type resource will be indexed using the title property.

the ontology definition in Figure 22 are:

```
SELECT id FROM themes WHERE MATCH (title,description) AGAINST

('metadata')

SELECT id FROM researcher WHERE MATCH (title,description) AGAINST

('metadata')

SELECT id FROM theme_editorials WHERE MATCH (editorial) AGAINST

('metadata')
```

SELECT id FROM theme_resources WHERE MATCH (title) AGAINST ('metadata')

In order to construct these queries *generically*, we need to be able to derive the appropriate index at run-time. We do this by using the OntoReader module (see Section refgeneric-db), which provides the methods getThemeIndex(), getClassIndex() and getUDTIndex(). For example, the strategy for performing a full-text search on themes becomes:

- 1. Get index for theme getThemeIndex()
- 2. Construct SQL statement for extracting the id of all themes which match the query
- 3. Execute SQL statement, storing id of all themes that match the query
- 4. For each UDT (user defined type), get the index for the UDT (getUDTIndex), construct SQL statement for extracting the id of all themes for which the matching UDT data is a property, and store returned theme id values
- 5. Foreach (unique) theme id stored, extract the the title of the theme and return this as a positive match result.
- 6. Apply search.xsl stylesheet to present results to user.

5.6 Creating an offline distribution

This section describes the issues involved in creating a "distribution" version of domains modelled by OntoPortal2. A distribution version would allow the data to be browsed (for example, from a CD) without having to be online or having to configure the OntoPortal2 framework (i.e. the database/CGI backend) to power exploration of the domain. Rather than have each data view dynamically generated according to user interactions, a distribution version consists of interlinked static HTML pages that "snapshot" the state of the dynamic pages at the time of creation.

We wanted to use an existing tool to create a static version - Gnu wget [2].

From wget documentation:

Wget is a network utility to retrieve files from the Web using http and ftp, the two most widely used Internet protocols. It works non-interactively, so it will work in the background, after having logged off. The program supports recursive retrieval of web-authoring pages as well as ftp sites—you can use wget to make mirrors of archives and home pages or to travel the Web like a WWW robot.

We found that when wget makes a request to the Explore interface (we are currently only concerned with capturing the Explore interface for distribu-

tion), the filename of the saved HTML file is created as follows:

REQUEST:

FILENAME:

These mirrored HTML files cannot then be browsed easily by a HTML browser (since there is no .html extension), and the links between HTML pages do function. The hierarchical feel of the Explore interface is lost, since

files are stored in flat directory structure.

5.6.1 An offline solution

We redesigned the method by which the Explore interface receives parameters from user interactions, which gives the appearance of browsing a hierarchical directory of HTML files, rather than passing arguments to a CGI script:

EXPLICIT PARAMETERS:

http://www.ontoportal.org.uk/explore.cgi?theme=1&class_type=literature&class=24

IMPLICIT PARAMETERS:

http://www.ontoportal.org.uk/explore/themes/1/literature/24.html

The Explore interface, invoked through the explore.cgi script (renamed to explore to continue the illusion of browsing a directory hierarchy) is still

46

being invoked, but the arguments are passed to it differently. The first invokation explicitly passes the named arguments to the script in the conventional manner. In the second invokation, the parameters are derived implicitly from the additional information after the script name (/themes/1/literature/24.html). However this invokation is treated as a hierarchical directory structure by wget, which proceeds to mirror the structure (Figure 23).

The wget tool can then be used to create a static snapshot of the dynamic Explore interface, producing a hierarchical directory of inter-linked HTML files which can be distributed on CD. To remove references to the dynamic Search, Update, and Discuss interfaces, an alternative "static" XLST stylesheet was derived from existing stylesheets, with all entry points to interactive content removed.

Figure 23: Directory structure automatically created by wget in mirroring the dynamic Explore interface to a distributable static, inter-linked HTML version.

6 MetaPortal: An application of OntoPortal

To create the MetaPortal web site, the OntoPortal system was used. The ontology was defined, as discussed above, and selected members of the IAM Research with the correct level of experience, were used to provide the content for MetaPortal. Each author was in charge of one or two themes. The following themes were selected for MetaPortal.

- Bibliographic Metadata for Digital Libraries
- Inferences and Metadata
- Introduction to Metadata
- Metadata Acquisition
- Metadata for Expertise Models
- Metadata Schemas
- Middleware and Metadata
- Ontologies and Metadata
- Reasoning and Knowledge
- The Semantic Web

The total number of concepts added is detailed below.

Centers of Excellence	4
Literature	157
Organisations	9
Projects	46
Promotion Projects	2
Researchers	129
Software	33
Standards	25
Standards Committees	12
Teams	44

641 relationships exist between all the concepts.

7 Related Work

The practice of adding semantics to web resources (using standards such as XML [18], RDF [17], Dublin Core [1], OML [15], and OIL [8]) in order to build a knowledge base has been the focus of previous research.

SHOE [12] allows researchers to annotate their WWW resources with metadata, in order to build a distributed knowledge base. Ontologies are used to declare the desired characteristics and relationships of a Web resource and SHOE-specific markup is used to annotate the resource and make its properties explicit. The real potential behind SHOE is the ability to draw on the ontology to infer supplementary knowledge not directly stated within the facts describing the web resource. (KA)2 [6] applies a similar approach although places a greater emphasis on the ontological engineering process as well as supporting inference. [16] describes how the (KA)2 initiative has now evolved to provide a coherent set of tools with which to design community Web portals. Finally, topic maps [13] are used to classify concepts (topics) and their relationships in a web site. This semantic layer is then used as a concept browser where users are provided with consistent and accurate access to the information.

COHSE [7] is an open hypermedia system whose links are defined by an inde-

pendent Ontology Service. ScholOnto [14] uses an ontology of argumentation to model relationships in the literature, focusing on the claims scholars make in their articles. The ontology supports patterns of argumentation between literature, such as refutation, support, extension or modification. These relationships are recorded in a central knowledge base, from which higher-level relationships between the literatures can be inferred, such as *Has anyone built on the ideas in this paper*, and in what way?.

Zope [11] is an open source web application server that enables collaborate content creation and management, much like OntoPortal, but also provides more advanced features like membership, personalization and e-commerce. Where they differ however, is in the representation of the knowledge. Onto-Portal uses an ontology to structure the knowledge within a domain and provide the navigation paradigm, while Zope enforces an object-oriented structure over familiar web concepts such as folders, documents and images.

8 Further Work

While a huge improvement over OntoPortal1, OntoPortal2 has room for further work.

Personalisation It would be interesting to take *more* advantage of the extensibility of XML and XSLT to produce a personalised view of the data on a per user basis. At the moment the personalisation simply applies to the authentication status of the user (i.e. not logged in, logged in to participate in discussions, logged in to author).

Better ontological support Currently the range of ontological structures supported is severely limited. At the very least, support for subsumption needs to be added which would allow OntoPortal to support most ontological structures, albeit perhaps in a limited fashion. Other ontological methods such as facets, cardinality, and axioms are also desirable although not as vital.

Generic stylsheet construction Although the back-end processes of OntoPortal are generic in the sense that any ontology (conforming to OntoPortal2) can be plugged in to create a new application, the construction of the accompanying stylesheets is a manual process requiring a significant time overhead. Naturally, this does have the advantage that

the user can fully customise the look and feel of her OntoPortal application, and this ability must not be removed. However, it would be useful to have a set of tools to either create a set of *standard* stylesheets using the defined ontology, or at least create skeleton stylesheets for the administrator to complete.

Discussion moderation In OntoPortal2 only authorised users are permitted to post a discussion about a resource within the application. This process is unmoderated, relying on the authorised users to conduct an appropriate discussion. This approach has two disadvantages. Firstly, unregistered users are unable to participate. Secondly, the possibility of inappropriate discussions evolving exists. A moderated system on the other hand, will solve both problems. Any user is allowed to post discussions and the possibility of inappropriate discussions appearing is eliminated. The downside is the time lag between a user posting a message and it appearing on the site.

The OntoPortal framework makes it easy to create knowledge portals such as MetaPortal. The framework was recently used to create an educational site for lecturers called TPortal. TPortal allows lecturers to gain access to course related material to enable them to better understand *all* available resources and their relationships. A simple ontology was designed (Figure 24) and

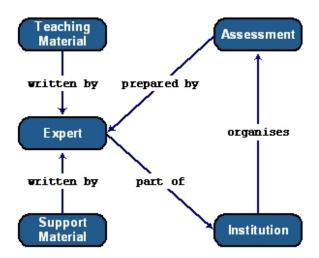


Figure 24: The TPortal ontology

initially a single theme, entitled *Java*, was populated. It is envisaged that TPortal will be expanded to cover more themes and then be used by the computer science department at the University of Southampton.

A OntoPortal Version 1 Screenshots

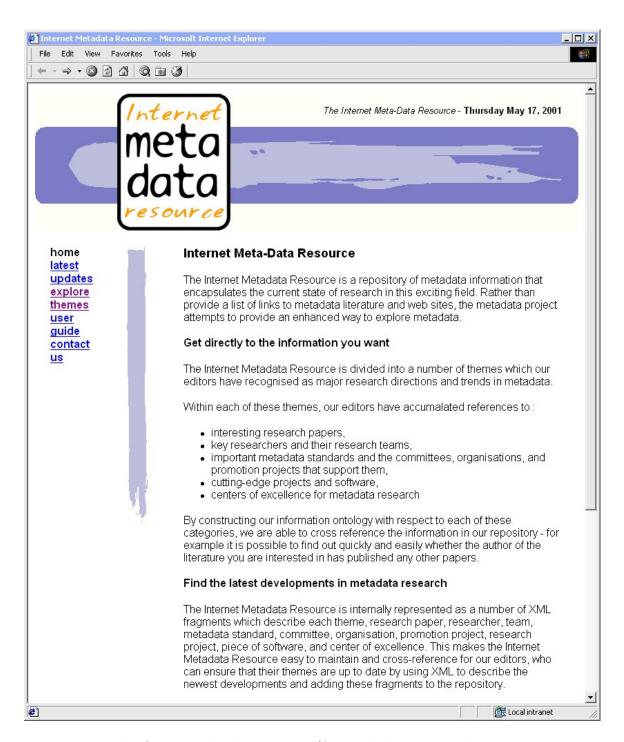


Figure 25: The OntoPortal1 home page (formerly known as the Internet Meta-Data Resource)

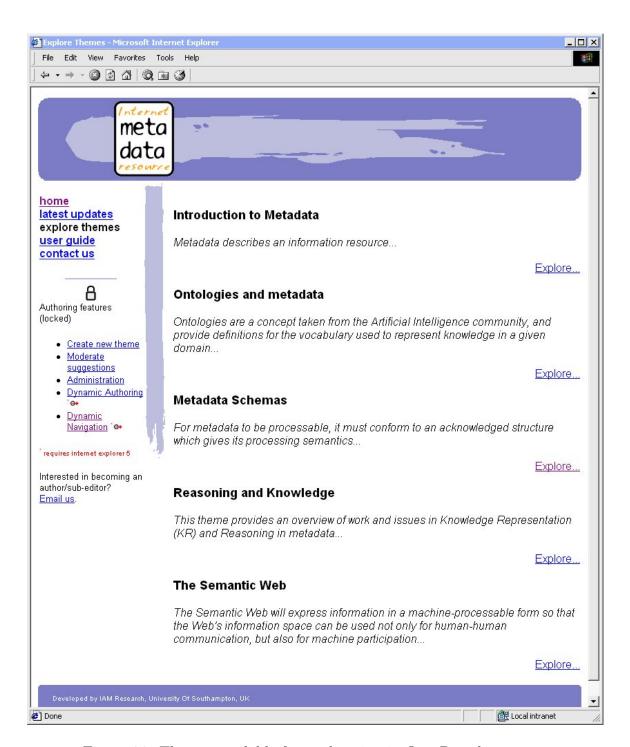


Figure 26: Themes available for exploration in OntoPortal1

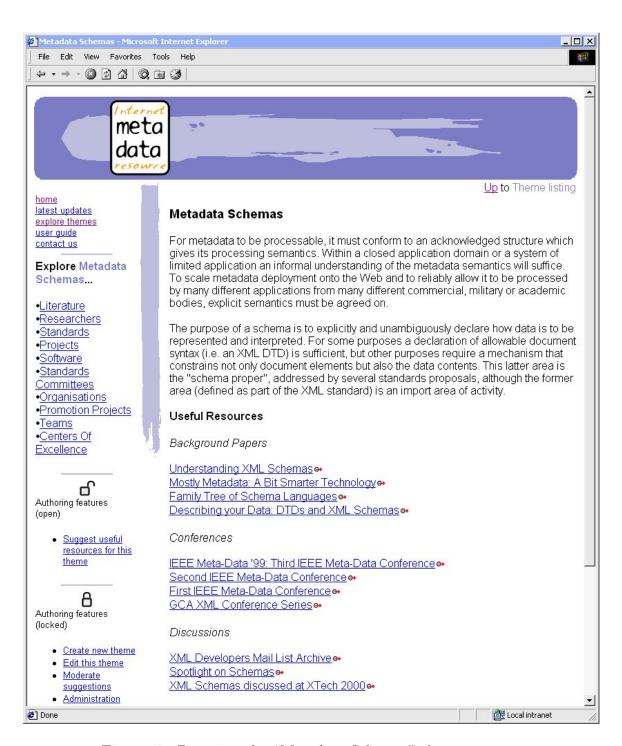


Figure 27: Browsing the "Metadata Schemas" theme



Figure 28: Browsing the literature resources relevant to the "Metadata Schemas" theme

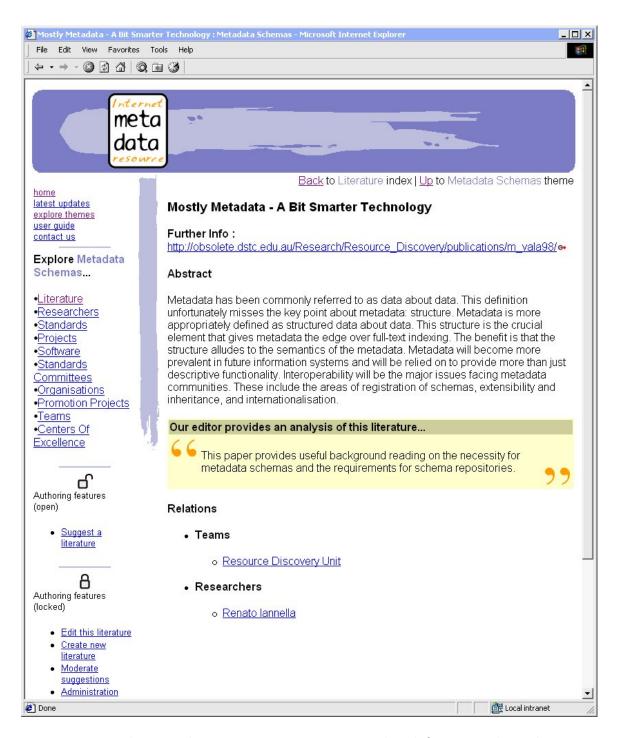


Figure 29: Exploring a literature resource in more detail (note ontological relationships)

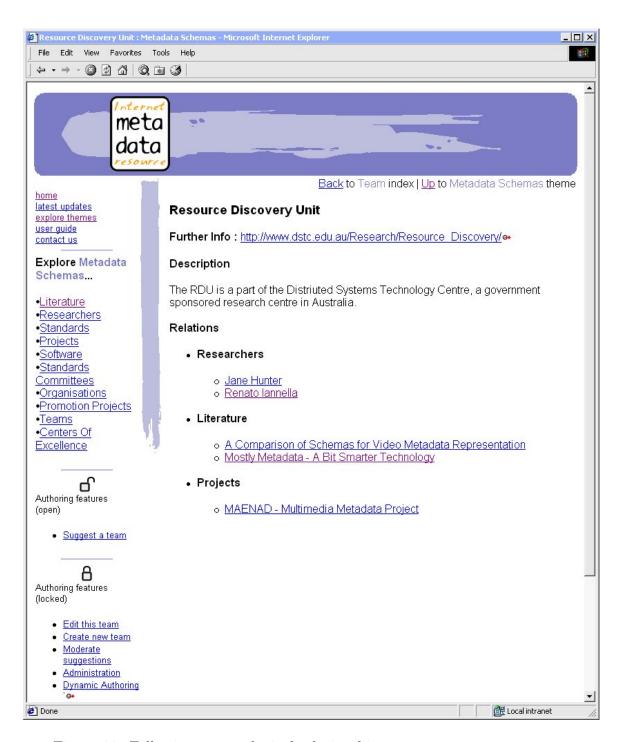


Figure 30: Following an ontological relationship to a team resource

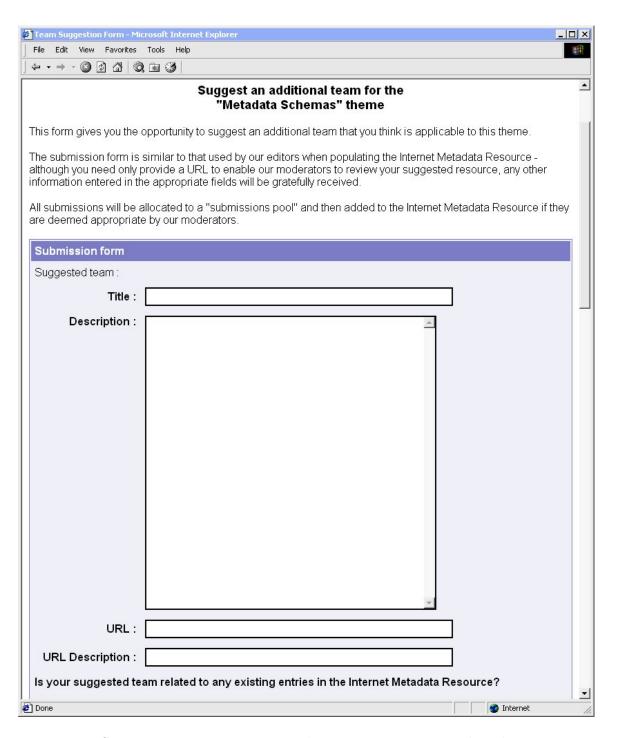


Figure 31: Suggesting a team resource that is appropriate to this theme (facility available to all users)

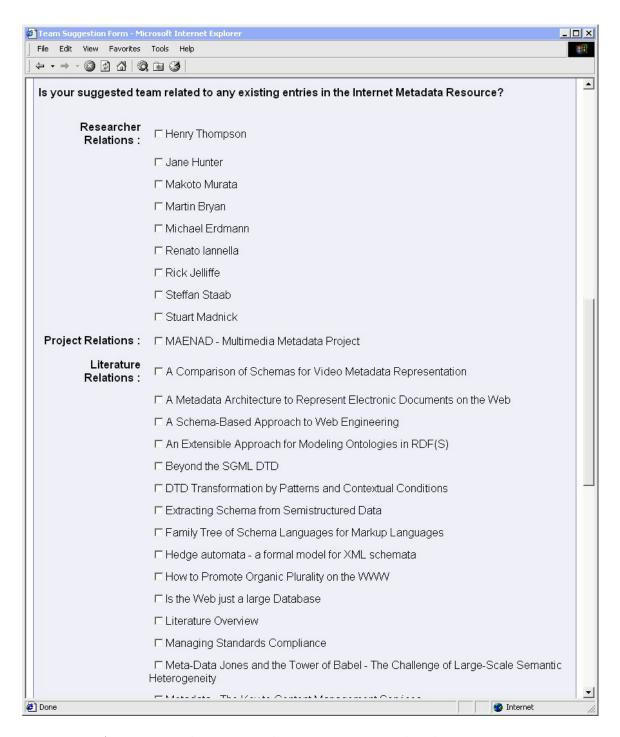


Figure 32: Associating the suggested team resource with other resources in the theme

Team Suggestion Form - Mic	rosoft Internet Explorer	
File Edit View Favorites	Tools Help	111
	। 🗟 🤡 ा New Approaches to Cataloguing, Querying and Бrowsing Geospatianwetadata	
	Contologies as Conceptual Models for XML Documents	
	Semantic Metadata for the Integration of Web-based Data for Electronic Commerce	
	☐ The Role of Architectural Forms in XML-EDI	
	☐ The Role of Document Type Definitions in Electronic Data	
	☐ Toward Unified Metadata for the Department of Defense	
	□ Using XML Schemas to define B2B Datatypes	
	☐ Web-based Information Access	
	☐ XML Schema Technical Tutorial	
	☐ XML-Constraints with Scheme	
Comments	A	
(these will be brought to the attention of our moderator)	₩	
Your name : *		
Your email address∶*		
Your URL : *		
Description of your URL : *	(e.g. homepage, curriculum vitae)	
	Submit Suggestions Clear Form	
* This information is not your suggestions approp	mandatory, but would be useful to our moderators in order to contact you and/or to give oriate credit should they appear in the Internet Metadata resource.	
Developed by IAM Research, U	Iniversity Of Southampton, UK	
Done		-

Figure 33: Submitting the suggested team resource

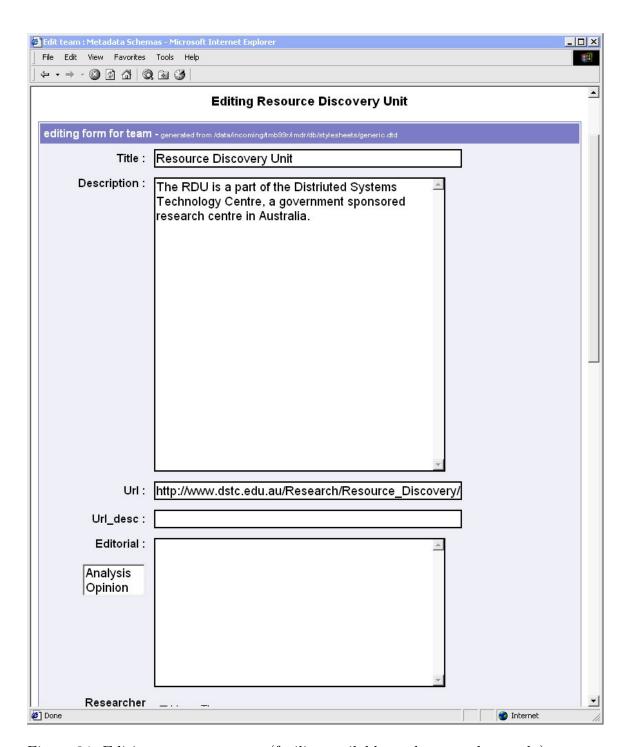


Figure 34: Editing a team resource (facility available to theme authors only)

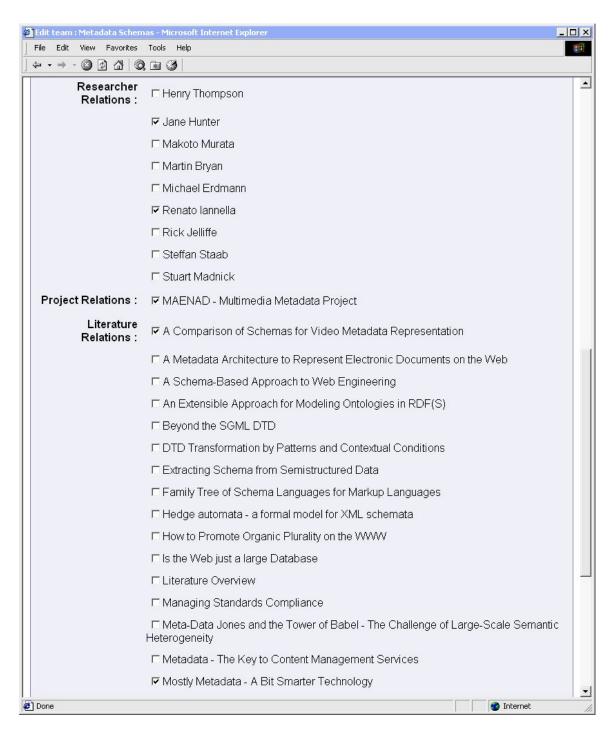


Figure 35: Editing the relationships between a team resource and other resources in the theme

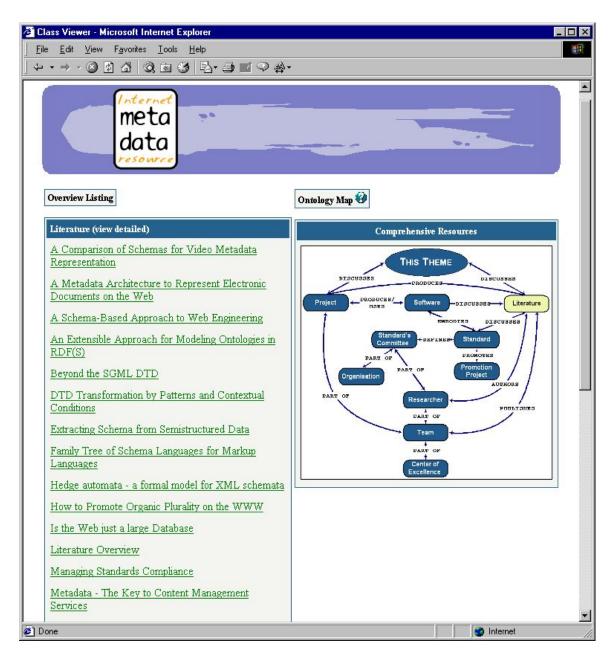


Figure 36: Using the ontological navigation tool to navigate a theme's concepts

B OntoPortal Version 2 Screenshots

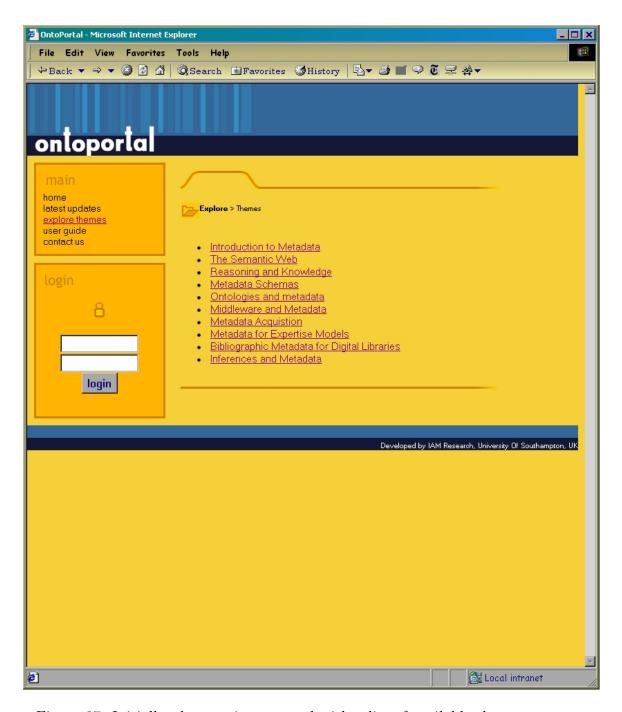


Figure 37: Initially, the user is presented with a list of available themes.

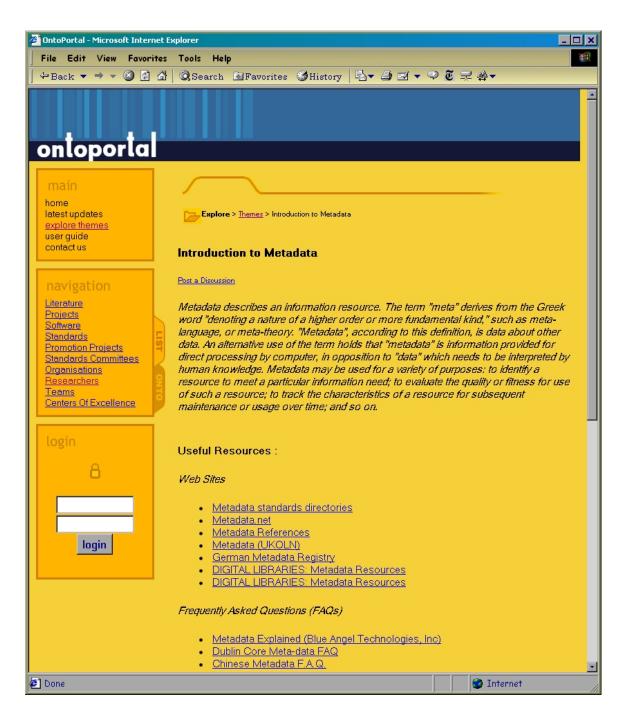


Figure 38: Upon selecting a theme, the user is presented with background information to explain the theme.



Figure 39: The user selects *Literature* from the navigation menu and is presented with a list of all literature in the current theme.

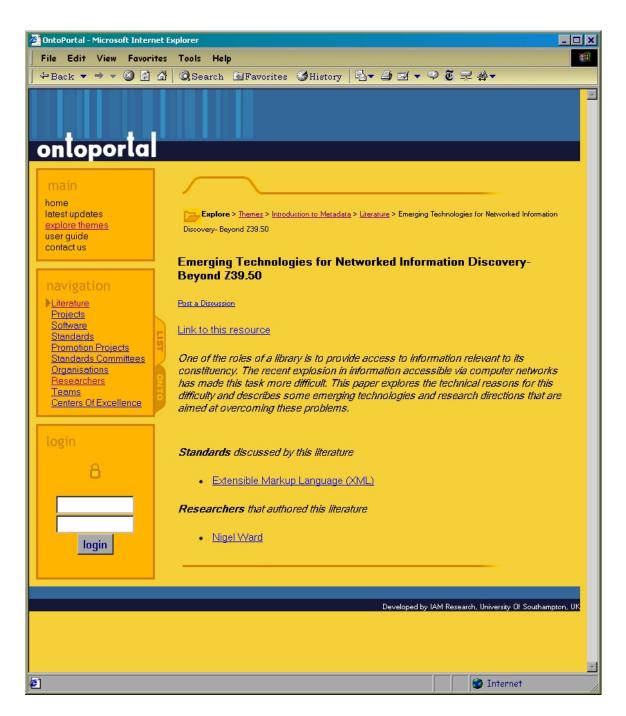


Figure 40: Upon selected a particular literature instance, information on that resource as well as its relationships to other resources is displayed.

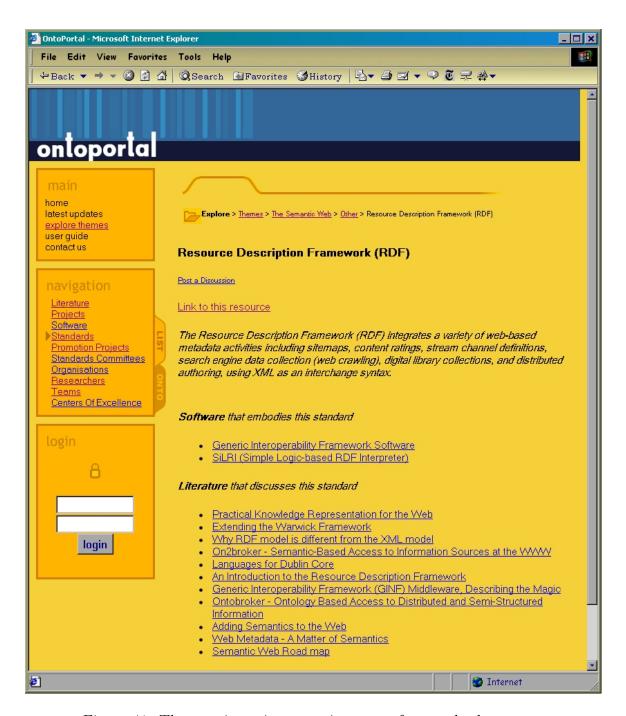


Figure 41: The user investigates an instance of a standard.

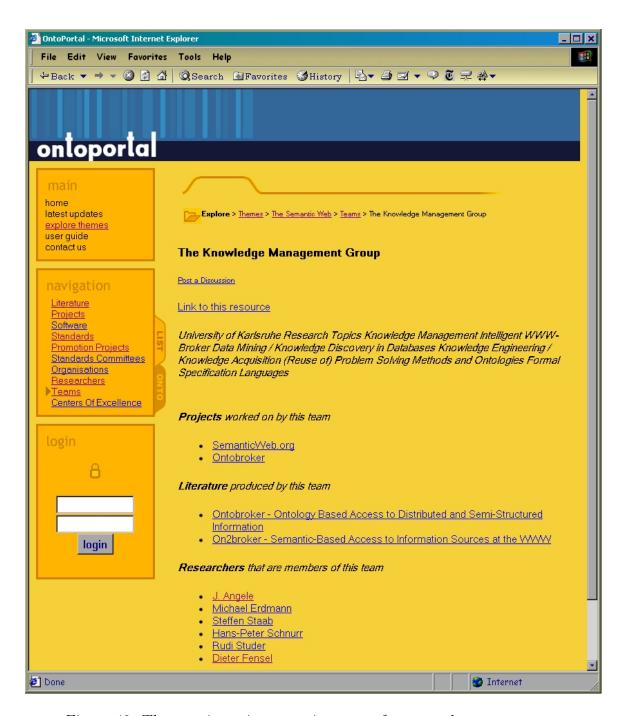


Figure 42: The user investigates an instance of a research team.

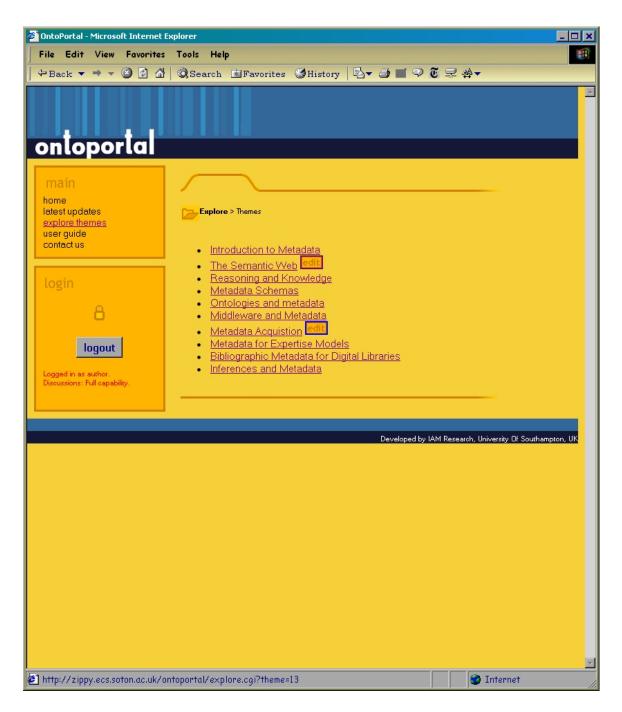


Figure 43: Once the user logs in, a small edit icon is placed next to the themes for which she has authoring privileges.

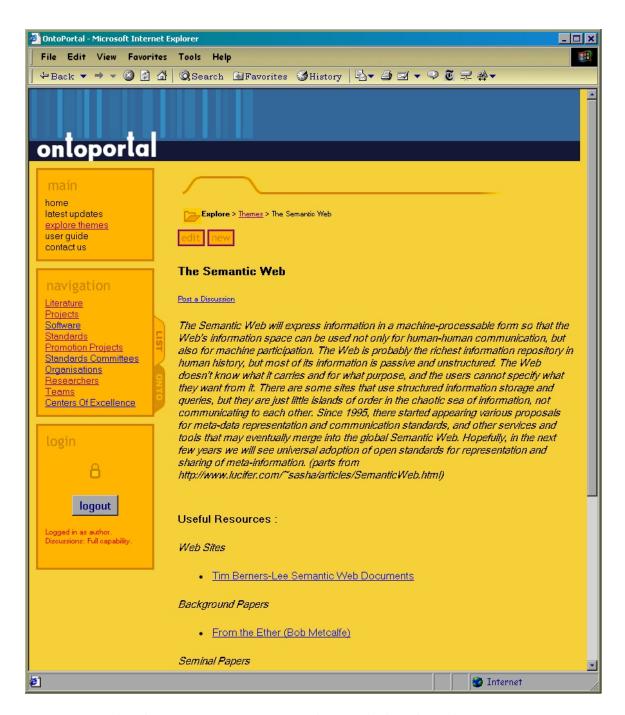


Figure 44: The theme instance screen is also marked with authoring icons.

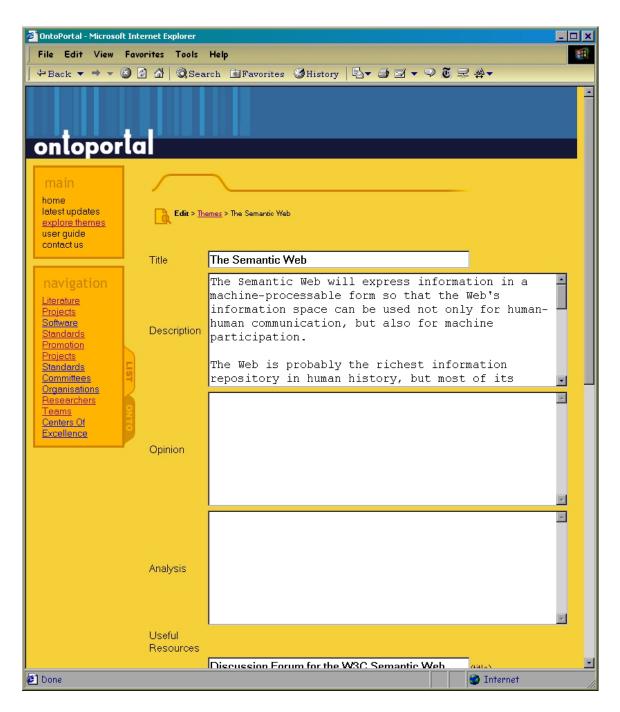


Figure 45: By selecting the edit icon in the theme information screen, the user is able to modify the properties of a theme.

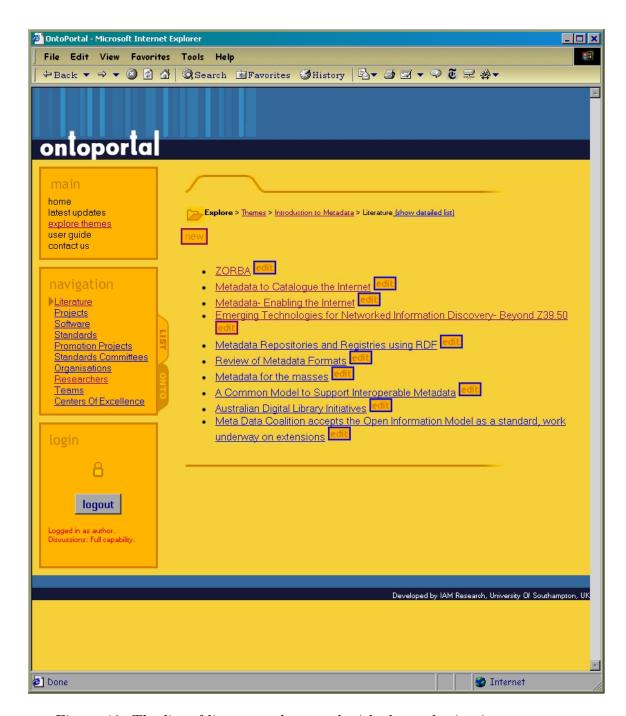


Figure 46: The list of literature decorated with the authoring icons.

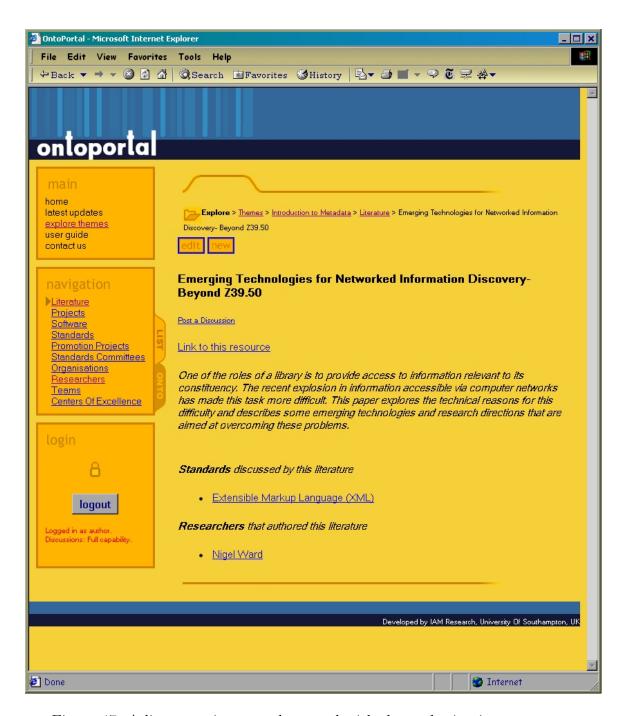


Figure 47: A literature instance decorated with the authoring icons.

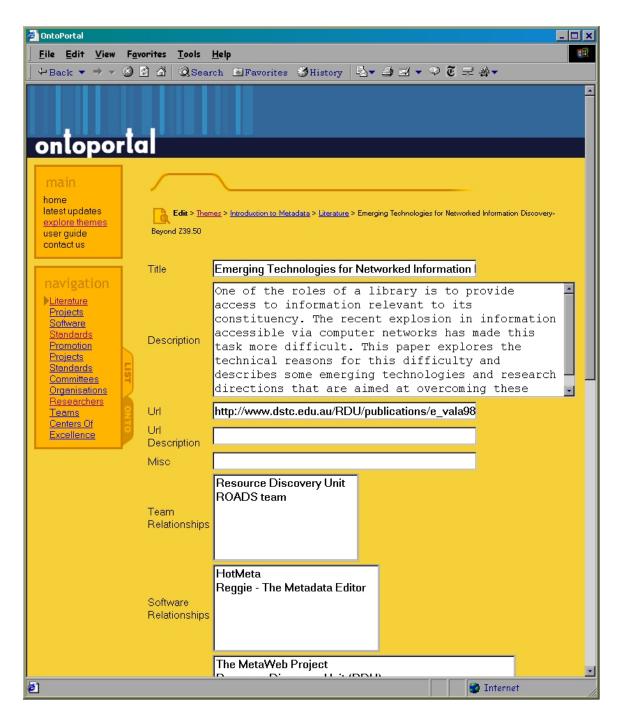


Figure 48: Selecting the edit icon for a literature instance, brings up a form with the property fields completed.

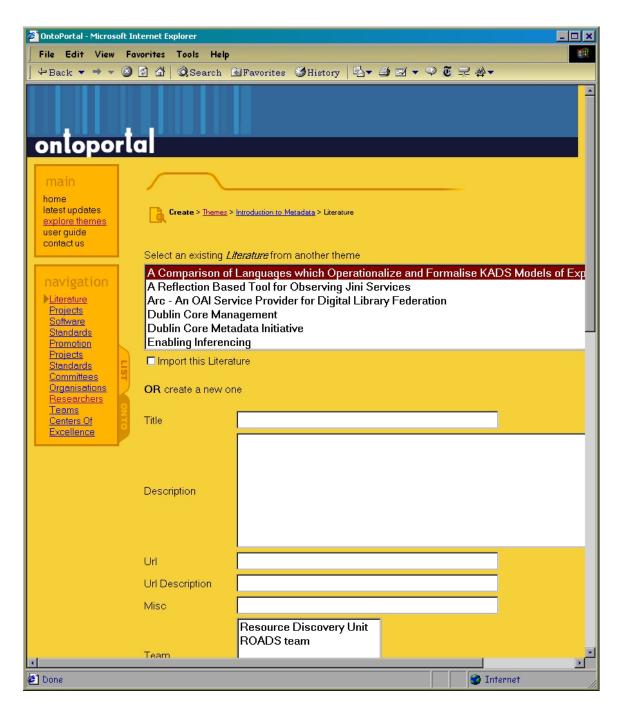


Figure 49: Selecting the new icon for a literature instance, brings up a form for the author to complete.

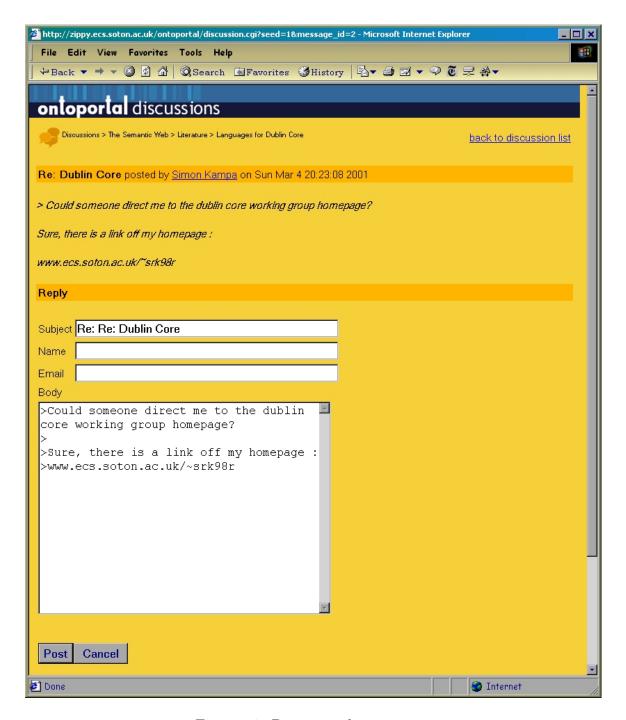


Figure 50: Discussion list.

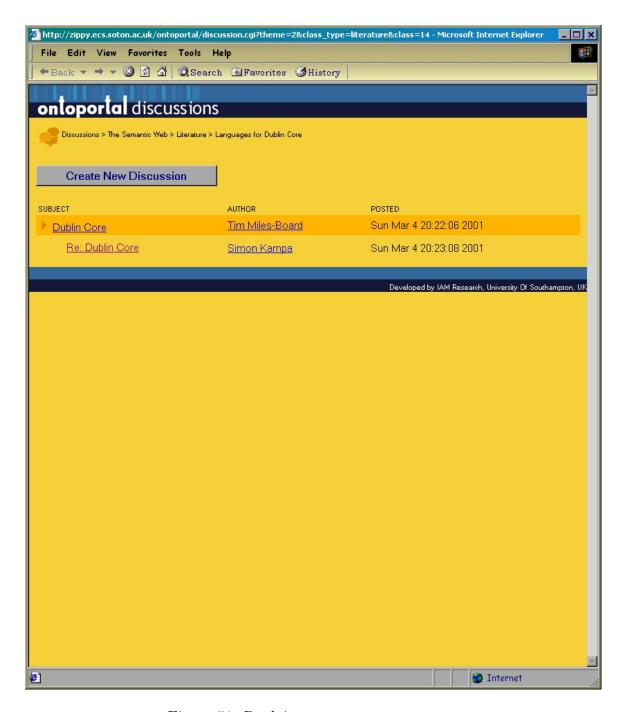


Figure 51: Replying to a message.

C Resources

C.1 Contacts

Project Leader

Dr. Leslie Carr IAM Research Group Electronics and Computer Science University of Southampton Highfield Southampton SO17 1BJ UK

Telephone: (023) 8059 4479

Fax: (023) 8059 2865

e-Mail: lac@ecs.soton.ac.uk

Project Investigator and Implementor

Timothy Miles-Board IAM Research Group Electronics and Computer Science University of Southampton Highfield, Southampton SO17 1BJ UK

Telephone: (023) 80594059 Fax: (023) 8059 2865

e-Mail: tmb99r@ecs.soton.ac.uk

Project Investigator and Implementor

Simon Kampa IAM Research Group Electronics and Computer Science University of Southampton Highfield, Southampton SO17 1BJ UK

Telephone: (023) 80594059 Fax: (023) 8059 2865

e-Mail: srk98r@ecs.soton.ac.uk

C.2 Links

OntoPortal.org

A web site detailing this work can be found at:

http://www.ontoportal.org.uk

A static snapshot of MetaPortal is available at this site. A dynamic version will also be added.

References

- [1] Dublin core initiative. http://www.purl.org/dc/.
- [2] Gnu wget. http://www.gnu.org/directory/wget.html.
- [3] Microsoft xml parser sdk. http://msdn.microsoft.com/xml/default.asp.
- [4] Mysql. http://www.mysql.com.
- [5] Xalan c++. http://xml.apache.org/xalan-c/index.html.
- [6] R V Benjamins, D Fensel, and A G Perez. Knowledge management through ontologies. Proc. PAKM'98 Practical Aspects of Knowledge Management, October 1988.
- [7] L Carr, W Hall, S Bechhofer, and G. Goble. Conceptual linking: Ontology-based open hypermedia. Proc. 10th International WWW Conference, pages 334–342, May 2001.
- [8] D Fensel, I Horrocks, F Van Harmleden, S Decker, M Erdmann, and M Klein. Oil in a nutshell. http://www.cs.vu.nl/ ontoknow/oil/downl/oilnutshell.pdf, October 2000.
- [9] D Fensel and M A Musen. The semantic web: A brain for humankind. IEEE Intelligent Systems, 16(2):24–25, March/April 2001.

- [10] S Kampa, T Miles-Board, L Carr, and W Hall. Linking with meaning: Ontological hypertext for scholars. Technical Report ECSTR-IAM01-005, Electronics and Computer Science Department, University of Southampton, March 2001.
- [11] A Latteier. The insider's guide to zope: An open source, object-based web application platform. WebReview, March 5 1999.
- [12] S Luke, L Spector, and D Rager. Ontology-based knowledge discovery on the world wide web. Proc. AAAI'96 Workshop on Internet-based Information Systems, August 1996.
- [13] S Pepper. Euler, topic maps, and revolution. XML Europe, April 1999.
- [14] S Buckingham Shum, E Motta, and J Domingue. Representing scholarly claims in internet digital libraries: A knowledge modeling approach. Proc. 3rd European Conference on Research and Advanced Technology for Digital Libraries, September 1999.
- [15] J Snyder and U Flemming. The object modeling language (oml) specification. http://seed.edrc.cmu.edu/ACL/ObjModelAPI/objapi.ps.
- [16] S Staab, J Angele, S Decker, M Erdmann, A Hotho, A Maedche, H P Schnurr, R Studer, and Y Sure. Semantic community web portals. Proc. 9th International WWW Conference, pages 474–491, May 2000.

- [17] W3C. Rdf (w3c recommendation). http://www.w3.org/RDF/, February 199.
- [18] W3C. Xml 1.0 second edition (w3c recommendation). http://www.w3.org/TR/REC-xml, October 200.