Advanced Software Development
Workstation Project
ACCESS User’s Guide

Inference Corporation

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Research Institute for Computing and Information Systems
University of Houston - Clear Lake

The University of Houston-Clear Lake established the Research Institute for Computing and Information systems in 1986 to encourage NASA Johnson Space Center and local industry to actively support research in the computing and information sciences. As part of this endeavor, UH-Clear Lake proposed a partnership with JSC to jointly define and manage an integrated program of research in advanced data processing technology needed for JSC's main missions, including administrative, engineering and science responsibilities. JSC agreed and entered into a three-year cooperative agreement with UH-Clear Lake beginning in May, 1986, to jointly plan and execute such research through RICIS. Additionally, under Cooperative Agreement NCC 9-16, computing and educational facilities are shared by the two institutions to conduct the research.

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Preface

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Submitted by
Inference Corporation
550 N. Continental Blvd.
El Segundo, CA 90245
(213) 322-0200
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1. Overview

ACCESS is a knowledge-based software information system designed to assist the user in modifying retrieved software to satisfy user specifications. The purpose of this document is to provide a user's guide for the knowledge engineer who wishes to create for ACCESS a knowledge base consisting of representations of objects in some software system. The purpose of this activity is to make this knowledge base accessible to an end user who wishes to use the catalogued software objects to create a new application program or an input stream for an existing system.

The application-specific portion of an ACCESS knowledge base consists of a taxonomy of object classes (see Subsection 2.1.1), as well as instances (also called cases) of these classes. Within the knowledge base there are also "rule" objects which are used to dynamically modify user-created objects - e.g., by computing a new attribute value for an object from the values of other object attributes (Section 2.3). Chapter 2 describes how to create such a knowledge base.

All objects in the knowledge base are stored in an associative memory. When the end user selects an existing object for examination or creates a new one, the attributes of this object are matched against attributes of the objects in the associative memory using a redundant hash-addressing algorithm. Names of objects matching the current objects are displayed to the user, and can be selected by him for examination or copy and reformulation.

ACCESS provides a standard interface for the end user to browse and modify objects. This is described in Chapter 3. In addition, the interface can be customized by the addition of application-specific data entry forms and by specification of display order for the taxonomy and object attributes. These customization options are described in Chapter 4.
2. Specification of a Knowledge Base

The user interface for ACCESS is designed so that the end user should not need to know anything about the ART-IM® schema system. However, each object in ACCESS is represented as an ART-IM schema and the knowledge engineer must have enough knowledge of the ART-IM schema system to create the initial object taxonomy. A detailed description of the ART-IM schema system is available in the ART-IM Reference Manual, Volume I. This Chapter contains examples of how to use the ART-IM schema system to represent knowledge base objects.

Included in the ACCESS release directory is a file "kernel.art" which contains those schema definitions which are required for every ACCESS application. The knowledge engineer will extend these schema definitions to include an application-specific object hierarchy.

2.1 Specification of Objects and Object Attributes

2.1.1 Creation of an Object Taxonomy

Each object in the knowledge base has "attributes" which may or may not have "values". In the schema system, the attributes of an object are slots in the corresponding schema; the values of these attributes are the ART-IM objects which are slot values in the schema. A "feature" of an ACCESS object is a attribute/value pair (or slot/value pair).

The object taxonomy in ACCESS includes a single root schema, named object. The definition for object, as supplied in "kernel.art" is as follows:

```
(DEFSHEMA OBJECT
  "The class of all objects."
  (NAME "OBJECT")
  (TEXT "")
  (SAVED-STATUS)
  (VIOLATES_CONSTRAINT))
```

Note that four attributes have been specified for this root object. These four attributes are inherited by child objects, although any default values for the attributes may be overridden. The value of the name attribute is the name of the object. The text slot has a string as its value (default is the empty string). The use of this slot is primarily confined to object instances and will be described in more detail below. The saved-status slot is used for internal bookkeeping. The violates_constraint slot is assigned a value each time the system detects that an object has an attribute with a value which violates a restriction the knowledge engineer has specified (e.g., the value of...
a slot is not an integer). It is also assigned a value each time the system detects that a combination of object features violates a constraint the knowledge engineer has specified. The specification of restrictions on attribute values and the use of constraints on objects will be described in Sections 2.2 and 2.3 respectively.

For any specific application the knowledge engineer will define schemas which are related to object through explicit or inherited is-a and instance-of relationships. The examples in this section are derived from a knowledge base designed to represent a trajectory simulation software package and to generate an input stream for that package. In this case object has two application-specific children, application_component and application_name, defined as follows:

```
(DEFSHEMA APPLICATION_COMPONENT
 (IS-A OBJECT)
 (NAME "Application_component")
)

(DEFSHEMA APPLICATION_NAME
 (IS-A OBJECT)
 (NAME "Application_name")
)
```

Each of these objects in turn has children. For example, one of the children of application_component is propagation-selection, which is defined as follows:

```
(DEFSHEMA PROPAGATION-SELECTION
 (IS-A APPLICATION_COMPONENT)
 (JCOAST)
 (JCASTG)
 (ON-ORBIT-TARGETING)
 (VECTOR-PROPAGATION)
 (TYPE-OF-SIMULATION))
```

The slots in this schema represent attributes whose values are used to specify to the simulation program how to propagate the trajectory orbit.

This schema, or object, in turn has children. An example of a child object is prop_sel_001, defined as follows:

```
(DEFSHEMA PROP_SEL_001
 (INSTANCE-OF PROPAGATION-SELECTION)
 (JCOAST 1)
 (JCASTG 2)
 (ON-ORBIT-TARGETING 1)
 (VECTOR-PROPAGATION 0)
 (TYPE-OF-SIMULATION 3_DOF_TRANSLATIONAL_R-K)
 (NAME "PROP_SEL_003")
)
```

The class propagation-selection is a subclass of the object application_component. An object in the propagation-selection subclass is intended to specify the input parameters required by the trajectory simulation package for propagating an orbit. In turn, the object prop_sel_001 is a specific instance of
this generic subclass and represents a particular set of parameters governing trajectory propagation. For example, the value of the slot, type-of-simulation is a symbol 3_dof_translational_r-k indicating that the integration technique to be used will be a translational Runge-Kutta method with 3 degrees of freedom.

Whatever his application, the knowledge engineer must specify a taxonomy of objects and specify the attributes of each object in this taxonomy. The specification of object attributes may be either explicit or implicit through inheritance from ancestor objects.

2.1.2 Attributes with Multiple Values

In ACCESS an object attribute can have a single value or multiple values. An attribute which is allowed to have only a single value is represented in the underlying ART-IM representation by a slot whose cardinality is single. This is the default and the knowledge engineer can define such attributes implicitly by simply using the slot in a schema. An attribute which may have more than one value is represented by a multi-valued slot. Such slots must be explicitly defined before they are used in any schema. An example of a multi-valued slot is the slot violates_constraint, which is specified as follows:

\[
\begin{align*}
\text{(DEFSchema VIOLATES CONSTRAINT} \\
\text{(INSTANCE-OF SLOT)} \\
\text{(CARDINALITY MULTIPLE)} \\
\text{(INHERITS YES)})
\end{align*}
\]

In this case, the schema definition specifies that violates_constraint is a multi-valued slot and that its uses will be inherited through inheritance links to related schemas. This is the default behavior; to create a slot whose uses are not inherited, the value of inherits must be no.

When the knowledge engineer creates a file defining the knowledge base, any multi-valued slot must be defined before any schema(s) which uses this slot.

2.2 Specification of Restrictions on Attribute Values

It is quite common that the values of a particular attribute for an object need to be restricted in some way. For example, the value of the hours attribute in a date object should be an integer between 0 and 23. In the example shown above, the value of the attribute type-of-simulation in a propagation-selection object represents the type of integrator which will be used to propagate a trajectory. This value must be one of an explicitly enumerated set of values.

ACCESS provides the knowledge engineer the capability to restrict the value of an object attribute in one of three ways:
1. Restrict the value to a specific type - float, integer, symbol, or string.

2. Restrict the value to be one of an explicitly enumerated set of values.

3. Restrict the value to be a symbol representing an object in one of an explicitly specified set of subclasses of objects.

In order to specify any of these types of restrictions, the knowledge engineer must create an instance of attribute-restriction schema. The attribute-restriction and enumerated-set schemas are defined as follows:

```
(DEFSCHEMA ATTRIBUTE-RESTRICTION
  (ALLOWABLE-CLASSES)
  (HAS-ENUMERATED-SET)
  (TYPE))

(DEFSCHEMA ENUMERATED-SET
  (ALLOWABLE-VALUES))
```

In order to be used by ACCESS, the name of an attribute-restriction schema instance must be the concatenation of the name of the attribute to which the restriction applies and "-restriction."

In specifying an attribute-restriction schema, exactly one of the three slots type, has-enumerated-set, and allowable-classes should be used. The type slot is used to restrict the value of the attribute in question to be a specific type. Allowable values for the type slot are float, integer, symbol, or string.

The has-enumerated-set slot is used to restrict the value of the attribute in question to a explicitly enumerated set of objects. The value of this slot must be a schema which is an instance-of an enumerated-set. The value of the allowable-values slot in this schema must be a sequence representing the list of allowable values.

The allowable-classes slot is used to restrict the value of the attribute in question to an instance of one of an explicit set of subclasses. For example, if the attribute propagator_select must have a value which is an instance of a propagation-selection object, this would be specified as follows:

```
(DEFSCHEMA PROPAGATOR_SELECT-RESTRICTION
  (INSTANCE-OF ATTRIBUTE-RESTRICTION)
  (ALLOWABLE-CLASSES PROPAGATION-SELECTION))
```

When the user assigns a value to an attribute which violates one of these restrictions, this will be detected by ACCESS. The result is that the object in question is marked as having a constraint violation. That is, a value is put into the violates_constraint slot of that object, indicating the type of restriction which has been violated. In this case, the value put into that slot would be propagator_select-restriction-violation.
In addition, through the interface, a pop-up window with a message to the user is displayed. This is described in Section 3.2.

2.3 Specification of Constraints on Objects

2.3.1 Rule Objects

An important aspect of the ACCESS design is that as objects are created and modified, there exist modification rules within the system which can propagate new attribute values or check the validity of existing values.

Modification rules in the knowledge base are themselves represented as objects and are transformed at initialization time into ART-IM rules. The definitions of the object class `rule` and the instance `compile_rule`, as supplied in `kernel.art` are as follows:

```
(DEFSCHEMA RULE
 "The class of all rules."
 (IS-A OBJECT)
 (COMPILE COMPILERULE_METHOD)
 (NAME "Rule"))

(DEFSCHEMA COMPILERULE
 (INSTANCE-OF RULE)
 (TEXT "(defrule compile_rule
 (declare (salience -100))
 (schema ?rule&"compile_rule
 (instance-of rule)
 (text ?))
 =>
 (send compile ?rule))")
```

At initialization of ACCESS, the ART-IM rule defined in the text slot of `compile_rule` is compiled. This creates a production rule, itself called `compile_rule`, which will cause the value of the text slot for each object which is an instance-of a `rule` to be compiled. In this way rules are generated which can modify other objects in the knowledge base.

2.3.2 Constraints and Argument Lists

A subclass of the class `rule` is the class `constraint`. The definition of the `constraint` class is as follows:

```
(DEFSCHEMA CONSTRAINT
 "The class of all constraints."
 (IS-A RULE)
 (ATTRIBUTE)
 (CONSTRAINT_OF)
 (NAME "Constraint")
```
The class *constraint* in turn has subclasses *formula*, *template*, and *predicate*.

A *formula* is an object used to specify how to compute the value of an attribute of a particular class of objects in terms of other attributes of that object and its subobjects. (A subobject of a given object is an object which is the value of an attribute of the given object.) For example, a class of objects of type *phase* has attributes *day*, *hour*, *min*, and *sec*, whose values represent the days, hours, minutes, and seconds since launch for the beginning of this phase of the mission. It also has an attribute, *tevent*, whose value is the time of the beginning of launch expressed in seconds. This value can be calculated from the values of the *day*, *hour*, *min*, and *sec* slots.

A *template* is an object used to specify how a piece of text (normally a code fragment) is to be generated on the basis of attribute values of an instance of a class of objects.

A *predicate* is used to specify how the system will verify relationships between the values of attributes of an object and its subobjects. A function is specified whose arguments are these values and which returns *T* if the relationship constraints are satisfied and *NIL* if they are not. If the test fails, the object is marked as having a constraint violation.

Any *formula*, *template*, or *predicate* schema must specify a value for the *constraint_of* slot. This value is the name of the object class to which the constraint is intended to apply. The computation specified by one of these constraints will only be invoked for objects which are instances of the specified class.

*Formulas* and *predicates* rely on user-specified functions either (in the case of a *formula*) to compute an attribute value or (in the case of a *predicate*) to test for a constraint violation. *Templates* use the ART-IM function *sprintf* to generate a string value. The knowledge engineer must specify how to determine the arguments to these functions.

This is done through the value of the *arguments* slot. This value must be a sequence of *n* elements, where *n* is the number of arguments which will be required by user-specified function or by *sprintf*. Each element in the sequence must be either a symbol or a sequence of symbols, each of which is an attribute name (in ART-IM, either a *slot* or a *relation*).

The use of this specification is perhaps best illustrated by an example. Suppose a constraint is intended to apply to all objects in the class *rendezvous*, and that this class has attributes *propagator_select* and *omp_model_select*. The values of these attributes are intended to be instances of *propagation-selection* and *omp_model* schemas, each of which will have a *text* attribute, whose values are
intended to be used as arguments to the constraint function. The following code fragment shows how this would be specified:

\[
\text{(constraint of rendezvous)} \\
\text{(arguments ( propagator_select text) (omp_model_select text)))}
\]

A constraint function will be applied to a specific object only if all arguments for that function exist. In general, if the \( i-th \) element of the argument list is a symbol representing a slot, then the \( i-th \) argument for the constraint function will the value of the slot in the object in question. If the \( i-th \) value of the argument list is a sequence of symbols, \( a_1, a_2, \ldots \), then the argument is found by first taking the subobject which is the value of the slot \( a_1 \), then taking the value of the slot \( a_2 \) in that subobject, assuming it also exists, etc. If the entire chain of subobjects exists, then the final element in the chain is the value passed to the constraint function.

The number of arguments to a formula or predicate function or to \text{sprintf} is limited to 40.

### 2.3.3 Formulas

A formula schema results in the creation of a rule which is used to compute a value for some attribute of a particular object class. A formula schema is of the following form:

\[
\text{(defschema formula} \\
\text{(constraint_of):class to which formula applies} \\
\text{(arguments)} \\
\text{(attribute):attribute for which value is computed} \\
\text{(function):name of function used to produce attribute value} \\
\text{(name):for documentation)}
\]

The value of the function slot of a formula instance is symbol representing the name of a user-supplied function. This is normally a \text{def-art-fun}, but could be a \text{def-user-fun} or an ART-IM system function.

In order for a formula to be applied, there must be an object in the knowledge base which is an instance of the class given by the value of the constraint_of slot. The values of attributes of this object and its subobjects as specified by the value of the arguments slot must exist. These values are then passed as arguments to the function specified in the function slot. The return value from this function is then used to modify the value of the object attribute specified by the value of the attribute slot.

As an example, consider a knowledge base which contains an object \text{date}, defined as follows:
The following is a formula designed to compute the value of the slot `tevent` given values for the `day`, `hour`, `min`, and `sec` slots:

```
(DEFSCHEMA PHASE FORMULA
 (INSTANCE-OF FORMULA)
 (ARGUMENTS(DAY HOUR MIN SEC ))
 (ATTRIBUTE TEVENT)
 (CONSTRAINT_OF PHASE)
 (FUNCTION CALC-SEC))
```

```
(def-art-fun calc-sec (?day ?hr ?rain ?sec
  (+ (+ (+ (* (* day 24) 3600) (*' ?hr 3600)) (* ?mln 60)) ?sec))
```

### 2.3.4 Templates

A template schema results in the generation of a rule which is used to compute string value for a slot in a particular object class. A template schema is of the following form:

```
(defschema template
  (constraint_of);class to which template applies
  (attribute);attribute for which value is computed
  (arguments)
  (name);for documentation
  (template_string);format string for printf function)
```

When an instance of a template schema is specified, the value of the template-string slot must be a string which is a suitable format string for `printf`. Continuing the example started in Subsection 2.3.2, here is a full specification of a simple template:
This template will apply whenever there is an instance of a rendezvous object such that the values of its proposator_select and omp_model_select attributes are themselves objects with text attributes. The values of these text attributes will be passed as arguments to sprintf, which will create a formatted string as specified by the value of the template_string slot. This string will then be asserted as the value of the text slot in the rendezvous instance object.

2.3.5 Predicates

A predicate schema results in the generation of a rule which is used to perform a procedural test on an object. If the test fails, the object is marked as having a constraint violation. This is done by asserting the name of the function as a value in the violates_constraint slot of the object.

A predicate schema is of the following form:

(defschema predicate
  (constraint_of) ; class to which predicate applies
  (arguments)
  (boolean-function); name of function to be used for test
  (name) ; for documentation)

As with a formula, the value of the boolean-function slot of a formula instance is symbol representing the name of a user-supplied function. This is normally a def-art-fun, but could be a def-user-fun or an ART-IM system function. A constraint violation is considered to have occurred if the function returns NIL.
3. ACCESS Interface

The following sections briefly describe the nature of the ACCESS interface. Information on how to customize this interface appears in Chapter 4.

3.1 ACCESS Tools Panel

Figure 3-1: ACCESS Tools Panel
The ACCESS Tools Panel displayed in Figure 3-1 is the first panel displayed upon invocation of ACCESS. The top half of this panel is used to display the taxonomy of the knowledge base. Within this region are three taxonomy subpanels or "windows." If an object in one of these subpanels is selected (by pointing and clicking) with the mouse, it is highlighted and becomes the "current object." If this object has children, then a list of these children is displayed in the next window to the right, with the name of the previously selected object displayed above. If an object is selected from the rightmost taxonomy window, then the taxonomy display is shifted one panel left before displaying the child list. Two buttons on the left of the taxonomy windows offer the user the option of shifting the display of the currently displayed taxonomy either right or left.

In the center there is a subpanel or "button" called the Open Object Button. This subpanel displays the name of the current object - that object which has been most recently selected from the taxonomy windows. If the current object is an object instance, then this button offers the option of "opening" the object for browsing or editing. Clicking on this button will invoke either the generic Form Panel or a custom form through which the object can be modified. If the current object is a class, then this button offers the option of creating an instance of that class and then opening the resulting instance for browsing or modification.

In the lower half of the Tools Panel are two windows, the Bookmarks Window and the Matches Window. The Bookmarks Window displays a chronologically ordered list of objects which have been opened during this ACCESS session. The Matches windows provides a list of objects in the same class as the current object, ordered by the extent to which they "match" the current object. Matching between two objects is done by comparing the features of one object with those of the other - each feature which matches increases the level of matching.

When an object is selected from either the Bookmarks Window or Matches Window by a mouse click, it becomes the current object. When this happens, the taxonomy windows are updated to display the ancestors and siblings of this object. The Open Object Button is updated to show the name of the new current object, and the Matches Window is also updated.

At the bottom of the Tools Panel is a display showing the name of the file from which the current knowledge base was loaded or to which it has been saved in the course of the current session.

3.2 Browsing or Modifying an Object - the Form Panel

In order to open an object or an instance of a class for browsing and/or editing, the user clicks on the Open Object Button in the center of the Tools Panel. If the current
object represents a class, rather than an object instance, the user will be prompted for the name of a new instance, as illustrated in Figure 3-2. If the user supplies such a name, that becomes the name of the new current object.

Once an object instance is opened, the generic Form Panel will be displayed (unless a custom form has been specified for the class to which the object belongs). When the Form Panel appears, the Tools Panel is "frozen" - that is, it becomes insensitive to mouse clicks and other input. The generic Form Panel is shown in Figure 3-3.
The name of the object being browsed is displayed in the upper left hand corner of the Form Panel. In the top half of the panel is the Object Features subpanel or window. Displayed inside this window are a list of object attributes and values. Attribute names and values are truncated if necessary to conform with the screen size. The user can select a particular feature to examine by pointing and clicking with the mouse.

When a feature is selected, the value corresponding to that feature is displayed in the
Attribute Value subpanel, which appears in the lower half of the Form Panel. The user can enter text directly into this subpanel, thus editing the currently selected attribute value. Any such editing must be confirmed by hitting the ESC key. When this is done, the Features display will be updated to show the modified value.

Alternatively, if the currently selected attribute is one whose value is restricted to an enumerated set or to an instance of an allowable class of objects, a "SELECT" button will appear to the top and right of this subpanel. By clicking on the SELECT button, the user will cause a menu of allowable values for this attribute to be displayed; he can then select one of them from the menu. If a selection is made, the Features display will be modified to show the newly-selected value.

Editing within the Attribute window does not change values in objects in the knowledge base until the user clicks on either the "APPLY" or "OK" button in the upper right hand corner of the Form Panel. Clicking on the APPLY button causes the changes which have been recorded on the Form Panel to be made to the object in the knowledge base or, if the object being edited is a "SAVED" object, to a copy of that object.

Within the knowledge base, objects are considered to be either "SAVED" or "WORKING." SAVED objects are those which were read into the knowledge base at initialization time or which have been explicitly saved by the user (see Subsection 3.3.1). No modifications can be made to a SAVED object. A WORKING object, on the other hand, is one which has been created by the user in the course of the current session and has not been explicitly saved.

If the user is editing a SAVED object when he selects APPLY or OK, he will be prompted for a new object name. ACCESS will make a copy of the saved object, assign it the new name, and apply the changes to it.

Once any changes to attribute values have been made, any constraints based on these new values are propagated. If constraint violations are detected, then a pop-up panel with a warning message is displayed, with one warning message for each constraint violation. (Figure 3-4 shows the pop-up warning panel.) The Matches Window is also updated based on the new attribute values.

The final button in the top right hand corner of the Form Panel is the "CLOSE" button. Clicking on the CLOSE button causes the Form Panel to be erased from the screen and resensitizes the Tools Panel.

OK is equivalent to APPLY followed by CLOSE.
3.3 Tools Panel Menus

Near the top of the Tools Panel are two pulldown menus - the Object menu and the Knowledge Base Menu. These menus are described in the following subsections.
3.3.1 The Object Menu - Saving, Deleting, or Displaying Source Code

The Object Menu consists of three options - save, delete, compare, and view source. Each performs its function on the current object, that is, the object whose name is displayed on the Open Object button.

The save option makes the current object a SAVED object. This means that this object can no longer be modified by editing and that its description will be saved if one of the save options is selected from the Knowledge Base Menu.

The delete option deletes the current object from the knowledge base. If this object appeared on the Bookmarks list, it is deleted from that list. A new object is selected to be the current object and the deleted object will no longer appear in the object taxonomy display.

The compare option allows the user to compare the current object with another object in the same class. When this option is selected, a pop-up menu of objects with the same parents is displayed. If the user selects one of these objects, then a panel appears which gives a static display of all features (attribute/value pairs) of the two objects which are different.

The view source option displays value of the text slot of the current object on the Source Panel. The displayed text can be browsed, but not modified by the user. This option is appropriate when ACCESS is being used to generate source code or an input stream for some software system, as it allows the user to examine the generated code. The Source Panel is shown in Figure 3-5.

At the top of the Source Panel are "WRITE" and "CANCEL" buttons. By selecting the WRITE button, the user causes the text in the text slot of the current object (i.e., the text which is displayed on the Source Panel) to be written to a file. The base name for this file is the name of the current object; its suffix is "txt".

Selecting the CANCEL button returns control to the Tools Panel.

3.3.2 The File Menu - Saving the Knowledge Base

The Knowledge Base Menu consists of three options - save, save as., and exit.

When the option save is selected, all SAVED objects in the knowledge base as well as ancillary customization data will be written out to the "current" file. This is the file whose name is displayed at the bottom of the Tools Panel - initially, it is the file from which the knowledge base was loaded. If there are WORKING objects in the knowledge base, a warning panel will be displayed and the user will have the option of canceling the save. The file created by save can be used as input to a subsequent ACCESS session.
The option **save as..** works in the same way as *save*, except that the user is prompted for the name of a file to save to. When supplied, this becomes the current file.

The **exit** option causes the current ACCESS session to be terminated. If a working object has been created or modify since the knowledge base was initially loaded or last saved, then a warning message is displayed and the user has the option of canceling.
4. Customization of the ACCESS Interface

4.1 Changing Defaults in the Interface

The default display order of the object taxonomy on the Tools Panel and the display order for an object's attributes and values on the Form Panel is governed by the way symbols are hashed internal to ART-IM. However, for clarity, the knowledge engineer may wish to specify a particular display order for attributes or a specific structure for the display of the object hierarchy. The method for doing so is described in the following sections.

4.1.1 Controlling the Display of the Object Taxonomy

The knowledge engineer has two methods for controlling the display of the object taxonomy in ACCESS. Each of these methods involves specifying a non-default value for a slot in the ACCESS schema.

4.1.1.1 Use of the ACCESS TAXONOMY Attribute

The ACCESS schema, which is present in all ACCESS knowledge bases, contains a taxonomy slot. This slot enables the knowledge engineer to specify a specific ordering for the displays of object classes which appear in the various taxonomy windows. The value of the taxonomy slot must be a sequence, with one element for each root object. Currently, there is single root object, called object. Each element of the taxonomy specification sequence is itself a sequence, the first element of which is an object (the parent) and the second element of which is a sequence with one element for each child of the given parent. The elements of this second sequence are taxonomy specifications in which the child is treated as the root object. The following shows a textual display of an object hierarchy and a code fragment with its corresponding sequence representation.

OBJECT

APPLICATION_NAME
  ASCENT
  ABORT
  RENDEZVOUS
  POPIS
  ENTRY

APPLICATION_COMPONENT
  DYNAMIC-ALLOCATOR
  SIMULATION_DEFINITION
When the knowledge base is read into ACCESS at initialization time, ACCESS checks the validity of any non-default taxonomy which has been specified. This verification includes checking the syntactic correctness of the sequence structure, checking that each atom in this structure is a symbol which is the name of an object, and checking that the appropriate parent/child relationships hold. If this verification fails for any reason, then ACCESS will revert to the default display.

4.1.1.2 Use of the filtered_object Slot

There are some objects which should not be accessible at all to the end user of an ACCESS application. Examples include rule objects. To avoid the display of an object in the object taxonomy, the name of that object should be placed as a value in the filtered_object slot of the ACCESS schema.

4.1.1.3 Construction of the Taxonomy Display

When ACCESS is initially invoked, the leftmost taxonomy window shows those objects which are children of the root object, object. This child list is ordered to first display any children which are instances of object (i.e., objects which have an explicit instance-of relationship to object). Next in the ordering are those subclasses of object as specified by the taxonomy ordering. Finally appear children which are not filtered objects but which do not appear in the taxonomy ordering.

When the user selects an object from this list, it becomes the "current object." Its name is displayed above the middle taxonomy window. Its children are then displayed as described above - first, child instances, then child subclasses from the taxonomy ordering, finally child subclasses which are not specified in the taxonomy ordering.
4.1.2 Controlling the Display of Object Features

4.1.2.1 Controlling the Order Display of Object Attributes

When the knowledge engineer wishes to specify a particular order for displaying the features (attribute/value pairs) of an object on the Form Panel, the method for doing so is to use an instance-of an ordering schema. The definition of the ordering schema is as follows:

```
(defschema ordering
  (attribute-order))
```

In order to specify the display ordering of attributes for a particular class of objects, one must create an instance-of an ordering schema whose name is the name of the class followed by "-ordering." The value of the attribute-order slot in this schema should then be a sequence of names of attributes (slots) in the corresponding class. For example, suppose the knowledge engineer has defined a class, date, as follows:

```
(defschema date
  (is-a time_coordinates)
  (milliseconds)
  (seconds)
  (minutes)
  (hours)
  (day)
  (month)
  (year))
```

To specify a particular ordering for display of objects which are instances of the class date, the knowledge engineer may then specify the following:

```
(defschema date-ordering
  (instance-of ordering)
  (attribute-order (year month day hours minutes seconds milliseconds)))
```

When an object of type date is displayed, the features will be ordered with the year first, followed by month, day, etc. If this object has other attributes which are not filtered objects, i.e., are not values of the filtered_object slot of the ACCESS schema, then the corresponding features will appear after those whose order has been explicitly specified. Note that typically the attributes is-a and instance-of are included among the list of filtered objects.

4.1.2.2 Controlling the Order of Display of Values of Multi-Valued Attributes

Some object attributes may have more than one value (see Subsection 2.1.2). These attributes are represented in ART-IM by multi-valued slots. For such attributes, the option exists to specify a function which will be used to order the values of this
attribute for display purposes and for formula functions, etc. The name of the function must be of the form SLOT-NAME-ORDERING-FUNCTION, where SLOT-NAME is the name of the slot in question. This function must accept as arguments two ART-IM objects which are permissible values for the slot and must return an ART-IM integer. This function will be used in the same way as the comparison function to the C library function qsort - that is, the first argument will be considered to be less than, equal to, or greater than the second depending on whether the value returned is less than, equal to, or greater than zero. The function must be consistent - that is, if it returns 0 for two arguments a and b, then it must return 0 for the argument b and a. Similarly, the value of the function with arguments a and b must be opposite in sign to the value of the function with arguments b and a. Violation of these consistency restrictions can cause ACCESS to die.

An example of an ordering function is the following, which orders instances of phase schemas on the basis of the value of the slot tevent. The ordering is defined so any object with no value or a non-integer value for tevent is considered to be less than an object which does have an integer value.

```
(def-art-fun phase-ordering-function (?s1 ?s2)
  ; get times from phase schemas 1 and 2
  (bind ?valid1 (and (symbolp ?s1) (schemap ?s1) (slotp ?s1 tevent)))
  (bind ?valid2 (and (symbolp ?s2) (schemap ?s2) (slotp ?s2 tevent)))
  (bind ?t1 (if ?valid1 then (get-schema-value ?s1 tevent) else NIL))
  (bind ?t2 (if ?valid2 then (get-schema-value ?s2 tevent) else NIL))
  (if (not ?t1) then
    (if ?t2 then -1 else 0)
  else (if (not ?t2) then 1
    else (if (< ?t1 ?t2) then -1
      else (if (eq ?t1 ?t2) then 0
        else 1))))
```

Internally, ACCESS uses a function which accepts as arguments a sequence of objects and the name of an ordering function for those objects and returns a sequence of the same objects in ascending order. There is a public interface to this function of the form

```
(reorder-values ?art-sequence ?ordering-function)
```

### 4.2 Specification of Forms in ACCESS

ACCESS uses TAE Plus (Transportable Applications Environment Plus) to support its user interface. TAE Plus provides a graphical, point and click user interface based on the X Window System. The knowledge engineer can use the TAE Plus Workbench to develop custom forms for browsing and editing objects in the knowledge base. The knowledge engineer must then specify the interface between these forms and the knowledge base. This section describes the structure of custom forms for use by ACCESS and describes that interface. For information on creating TAE forms, see the TAE Plus User Interface Developer's Guide.
4.2.1 Structure of Custom Forms

Figure 4-1: Example of a Custom Form

An example of a custom TAE form is shown in Figure 4-1.

A custom form is used to provide data entry for a single class of ACCESS objects. A form may consist of one or more TAE panels. If more than one panel is used, they should be positioned so that the end user can clearly see parts of all of them. These panels consist of "items", each of which has a data type and a presentation type.
These panels may be created using the TAE Workbench utility. Figure 4-2 illustrates the use of the Workbench to edit the JCOAST item on the propsel panel. Note that this item is of data type string and presentation type Radio Button.

Every form which is intended to be used by ACCESS must have at least one panel which contain three items which have presentation type Button and whose names are "apply", "close", and "ok." When the user selects "apply", the information which has
been entered onto the form is stored in the corresponding object in the knowledge base. Selecting "close" causes the form to be removed from the screen and control returned to the main ACCESS Tools Panel. "ok" is a combination of "apply" and "close."

In addition to these three items, each forms panel must also contain a Static item whose name is "object." This item is used by ACCESS to display the name of the object which is being edited.

In addition to these required items, each panel may contain items which are used to enter attribute values. Each item on a form panel must correspond to an attribute in the class associated with the form. Items may be of type Radio, Checkbox, Text, Textlist, or Pagedit. The first four of these types may be used to supply a single value for an attribute. The last type (Pagedit) may be used to supply multiple values for an attribute (e.g., for an attribute corresponding to a multi-valued slot in ART-IM).

Items on the form correspond to TAE variables of type Real, Integer, or String. TAE variables of type Real are converted to ART-IM objects of type FLOAT; variables of type Integer are converted to ART-IM integers. TAE variables of type String may be converted to ART-IM objects of type string, float, integer, or symbol, depending on what sort of conversion is specified.

TAE supplies a built-in capability for providing help on individual panel items. For details on this capability, see the TAE documentation.

### 4.2.2 Interface Between TAE Custom Forms and ACCESS OBJECTS

The TAE specification for a custom form resides in a .res file. The mechanism for specifying the correspondence between the TAE form and ACCESS objects is ART-IM schema definitions. There are three principal types of schemas used: the form-specification schema, the panel-spec schema, and the item-specification schema. The definitions of these schemas are as follows:

```lisp
(defschema has-item-specs
  (instance-of slot)
  (cardinality multiple))

(defschema conversion-specs
  (instance-of slot)
  (cardinality multiple)
)

(defschema form-specification
  (file-name) ;string
  (form-for-class);name of class to which this form applies
  (collection) ;pointer supplied by ACCESS
  (has-panel-specs));sequence of panel-spec schemas
```
(defschema panel-spec
  (has-item-specs)
  (panel-name) ;string
  (has-item-specs);names of item-specification schemas
  (target-pointer);pointer supplied by ACCESS
  (view-pointer) ;pointer supplied by ACCESS
  (saved-view-pointer);pointer supplied by ACCESS
  (panel-id)) ;pointer supplied by ACCESS

(defschema item-specification
  (corresponds-to-attribute);name of attribute in class to which
  [this item corresponds
  (parm-name) ;string giving name of item in TAE
  (value-type) ;value type in ART-IM — symbol, string,
  ;(both corresponding to TAE strings)
  ;integer (TAE integer), float (TAE real)
  (conversion-specs);OPTIONAL — two element sequences specifying
  ;conversion from TAE strings to ART-IM symbols
)

4.2.2.1 Form-specification Schemas

For each form created, the knowledge engineer must complete a form-specification
schema as follows:

1. The value of the file-name slot of this schema must be a string containing
the name of the .res file in which the form is specified.

2. The value of the form-for-class slot of this schema must be a symbol
representing the class of ACCESS objects which correspond to this form.

3. The value of the has-panel-specs slot is a sequence, each element of which
is the name of a panel-spec schema. There is one such schema for each
panel comprising the form.

For each panel-spec schema referred to in the form-specification schema, the
knowledge engineer must complete slots as follows:

1. The panel-name slot of this schema must be a string containing the TAE
panel name.

2. The has-item-specifications slot is a multi-valued slot whose values are
the name of item-specification schemas. There must be one such schema
for each optional item on the panel.

The remaining slots of the form-specification and panel-spec schemas are used
internally by ACCESS to store pointers to TAE structures.

The following is an example of completed form-specification and panel-spec
schemas, corresponding to the form displayed in Figure 4-1.
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(defschema form-for-propsel
  (instance-of form-specification)
  (file-name "forms.res")
  (form-for-class propagation-selection)
  (has-panel-specs (panel-for-propsel)))

(defschema panel-for-propsel
  (instance-of panel-spec)
  (panel-name "propsel")
  (has-item-specs jcoast-spec jcostg-spec on-orbit-targeting-spec
    vector-propagation-spec type-of-simulation-spec))

4.2.2.2 Item-specification Schemas

For each optional item on a custom form, the knowledge engineer must construct an item-specification schema which describes the interface between that item and the corresponding attribute in an ACCESS object.

Each item-specification schema must be created as follows:

1. The value of the corresponds-to-attribute slot is the name of the attribute in the ACCESS class which corresponds to this item. This name is actually the name of an ART-IM slot.

2. The value of the parm-name slot is a string corresponding to the name of the TAE item.

3. The value of the value-type slot specifies the manner in which the value on the form will be converted from a TAE variable to an ART-IM object. Allowable values for this slot are as follows:

   a. FLOAT. This is used when the item on the TAE panel is of data type Real. The value entered on the form is then converted from a TAE Real to an ART-IM float and vice-versa.

   b. INTEGER. This is used when the item on the TAE panel is of data type Integer. The value entered on the form is then converted from a TAE integer to an ART-IM integer and vice-versa.

   c. STRING. This may be used when the item on the TAE panel is of data type String. The value entered on the form is then converted from a TAE String to an ART-IM string and vice-versa. This is normally used for TAE items with presentation type Text, which allow free-form text entry.

   d. SYMBOL. This may be used when the item on the TAE panel is of data type String. If there are no values in the has-conversion-specs
If there are values in the has-conversion-specs slot, then the program will first try to use these specifications to convert from a TAE string to an ART-IM object and vice-versa. The algorithm for conversion is described below.

e. MIXED. This may be used when the item on the TAE panel is of type String. This is normally used when the TAE item has presentation type Radio Button item or Textlist. In this case, ACCESS uses the values in the has-conversion-specs slot to try to make a conversion from a TAE string to an ART-IM object. Each value in the has-conversion-specs slot is a two element sequence, whose first element is a string and whose second element is an arbitrary ART-IM object. A TAE string is converted to an ART-IM object by searching for a sequence whose first element matches the TAE string and then taking the second element of the sequence. If no string is found matching the TAE string, an error message is returned and the corresponding form is erased from the screen. Thus the knowledge engineer must be very careful to provide correct conversion specifications.

The following example shows an item-specification schema which is used to specify the conversion from a Radio button item to an attribute with integer values:

```
(defschema jcoast-spec
  (instance-of item-specification)
  (corresponds-to-attribute jcoast)
  (parm-name "JCOAST")
  (value-type MIXED)
  (conversion-specs ("KS" 1) ("CONIC" 2) ("AEG" 3) ("FFP" 4))
)`