

# Fastener Recommendation Expert System - First Draft Report

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## Problem

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### Task

The system supports selecting appropriate fastening methods for joining materials in construction, manufacturing, and DIY applications. It recommends specific fasteners based on material properties, strength requirements, environmental conditions, and practical constraints.

### Users

Target users include:

- DIY enthusiasts requiring guidance for home projects
- Engineering students learning about fastening technology
- Product designers selecting connection methods
- Procurement specialists evaluating fastener options

### Domain Complexity

The problem involves multi-dimensional decision-making considering:

- Material compatibility across 8 material types
- Strength requirements on ordinal scales (6 strength levels, 4 resistance levels)
- Environmental factors (moisture, chemicals, temperature, vibration)
- Practical constraints (curing time, permanence, tooling requirements)
- Context-dependent suggestions based on fact combinations

## Expert

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### Identity

Jasper's dad and uncle co-own a hardware store with over two decades of experience.

## Expertise Domain

The expert knowledge encompasses:

- Mechanical fastening (bolts, screws, cable ties)
- Adhesive bonding (PVA glue, epoxy, silicone sealant)
- Thermal joining (welding)
- Material science principles governing compatibility
- Environmental resistance requirements
- Load-bearing capacity specifications

## Knowledge Models

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### Problem Solving Model

The system implements a diagnostic inference pattern:

1. Gather facts through structured questioning (10 questions)
2. Apply forward-chaining inference to derive conclusions
3. Filter candidate fasteners using multi-criteria matching
4. Generate context-specific suggestions based on fact patterns
5. Present ranked recommendations with explanatory information

### Domain Model

Core entities and relationships:

#### Entities:

- Question: Represents user inquiry (choice or boolean type)
- Fastener: Connection method with properties and metadata
- MaterialProperties: Multi-dimensional property specification
- Rule: Conditional inference statement
- SuggestionRule: Context-triggered advisory statement

#### Enumerations:

- FastenerCategory: adhesive, mechanical, thermal
- Strength: none, very\_low, low, moderate, high, very\_high
- Resistance: poor, fair, good, excellent
- Permanence: removable, semi\_permanent, permanent
- Rigidity: flexible, semiFlexible, rigid

#### Relationships:

- Each Fastener has one MaterialProperties instance
- MaterialProperties define compatibility with material lists

- Rules map fact patterns to category recommendations or exclusions
- SuggestionRules apply conditionally to fastener categories

## Rule Model

The knowledge base contains 37 identified knowledge elements:

### Rules (7):

- IF material\_type=metal AND mechanical\_strength IN [high, very\_high] THEN recommend [mechanical, thermal] (priority 10)
- IF moisture\_exposure IN [outdoor, submerged] AND flexibility=true THEN require water\_resistance:excellent, rigidity:flexible (priority 9)
- IF permanence=removable THEN require permanence:removable (priority 8)
- IF curing\_time=immediate THEN exclude [adhesive] (priority 7)
- IF material\_type=wood AND mechanical\_strength IN [low, moderate] THEN recommend [adhesive, mechanical] (priority 6)
- IF material\_type IN [glass, ceramic] THEN recommend [adhesive] (priority 6)
- IF load\_type IN [vibration, heavy\_dynamic] THEN require vibration\_resistance:good (priority 5)

### Suggestion Rules (13):

Context-triggered recommendations for specific fastener-fact combinations (e.g., stainless steel for outdoor bolts, pilot holes for wood screws).

### Fasteners (7):

Concrete instances with full property specifications including tools, surface preparation, curing times.

### Questions (10):

Structured inquiries covering material type, strength, environmental exposure, permanence, timing, load type, and special requirements.

## Inference Type

Forward-chaining rule-based inference:

1. User answers populate fact base incrementally
2. Rules evaluate conditions against accumulated facts
3. Rules fire when all conditions satisfied, adding conclusions
4. Rules execute in priority order (highest first)
5. Conclusions guide fastener filtering using multi-criteria matching
6. Ordinal comparisons enforce minimum thresholds
7. Category filtering applies recommendations and exclusions
8. Property matching verifies required characteristics

The system employs data-driven inference - facts trigger applicable rules to derive conclusions rather than working backward from hypotheses.

## User Interface

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### CLI Implementation

Interactive command-line interface (`cli_test.py`) providing:

- Sequential question presentation with input validation
- Support for question skipping
- Real-time debug state persistence after each answer
- Formatted recommendation display with property details
- Contextual suggestions per fastener
- Session restart capability

### Web Implementation (NOT YET IMPLEMENTED!)

Flask-based web application providing:

- Browser-accessible question interface
- Form-based answer submission
- Visual presentation of recommendations
- Persistent session management

### Tools Used

- Python 3.12: Core implementation language
- uv: Package management and virtual environment handling
- Flask: Web framework for HTTP interface
- PyYAML: Human-readable debug output serialization
- pytest: Automated testing framework

Implementation follows object-oriented design with dataclass models ensuring type safety. Enum types enforce valid property values. JSON-based knowledge base enables non-programmer knowledge editing.

## Validation

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### Testing Strategy

Comprehensive test suite with 89 automated tests across 4 test modules:

#### **test\_models.py (20 tests):**

- Dataclass serialization/deserialization correctness

- Question, Fastener, MaterialProperties, Rule model validation
- Property type enforcement
- JSON round-trip (loading and saving) integrity

**test\_knowledge\_base.py (19 tests):**

- Knowledge base loading and saving operations
- Data persistence across serialization
- Content integrity verification
- Expected element counts and identifiers

**test\_inference\_engine.py (33 tests):**

- Fact management operations
- Rule evaluation logic
- Forward-chaining inference execution
- Fastener matching algorithms
- Suggestion generation
- End-to-end recommendation scenarios

**test\_ordinal\_scales.py (17 tests):**

- Ordinal scale definitions
- Enum value validation
- Comparison operator correctness
- Moisture-to-resistance mapping

## Validation Approach

- Unit tests verify individual component behavior
- Integration tests validate end-to-end recommendation scenarios
- Fixture-based tests ensure consistency against knowledge base
- Property-based tests verify ordinal comparison logic
- Debug state YAML enables manual inspection of inference traces

## Performance Verification

Test execution: 89 tests collected and executed via `uv run pytest`

All tests passing confirms:

- Rule evaluation produces expected conclusions
- Fastener filtering correctly applies criteria
- Ordinal comparisons enforce minimum thresholds
- Category filtering respects recommendations and exclusions

## Repository Information

**GitHub Repository:** <https://github.com/JasperK04/KTP>

**Branch:** dev

**Entry Point:** `src/main.py` (web, not implemented) or `src/cli_test.py` (CLI)

**Dependencies:** Managed via `src/pyproject.toml`, installed with `uv sync`

## Running the System

```
cd src
uv sync
uv run python cli_test.py      # CLI interface
uv run python main.py         # Web interface (not implemented)
uv run pytest                  # Test suite
```

## Project Structure

- `src/engine.py` (474 lines): Core inference engine and knowledge base
- `src/kb.json` (396 lines): Declarative knowledge base
- `src/cli_test.py` (227 lines): CLI testing interface
- `src/tests/`: Automated test suite (89 tests)
- `src/README.md` : Usage documentation
- `src/cli_test.md` : Testing workflow and debug format documentation

## Knowledge Complexity

Total identified knowledge elements: 37

- 10 Questions defining the fact space
- 7 Fastener instances with complete specifications
- 7 Inference rules with priority ordering
- 13 Suggestion rules for contextual recommendations

Each fastener contains 11 material properties, requires\_tools list, surface\_prep list, curing\_time specification, and notes. This yields approximately 100+ distinct knowledge elements when counting individual property specifications.

The system meets the minimum complexity requirement of 100 knowledge elements through:

- 37 top-level knowledge entities
- 7 fasteners × 11 properties = 77 property specifications

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- Multi-valued properties (e.g., compatible\_materials lists)
- Contextual suggestion conditions and triggers

Total knowledge base size: 396 lines of structured JSON containing comprehensive domain knowledge about fastening technology.