

# A Model for Representing Variational Spreadsheets

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*Abstract*—TBD

## I. INTRODUCTION

New motivation needed

We first give a motivating example for VarSheet. Figure 1a shows a conventional spending estimate of a college student. Suppose the student is not happy with it, they would adjust the costs of some categories based on available options. After some adjustments, the student ends up with the spreadsheet in Figure 1b, for which they pay \$50 less. In the updated spreadsheet, the housing cost is \$50 less since the rented house is further from campus, but that would increase the cost of transportation. The student also decides to pay \$100 less on their loan. Considering both versions, the student would probably go after the latter one, and by doing this, they lose the chance to reduce another \$50. Had the student chosen the original housing option and kept Loan payment to be \$500, the monthly cost would have been \$1450.

Figure 1c shows a possible user interface of VarSheet that could support the student in their decision making process. There are three variation points in the spreadsheet. The *Housing&Transportation* categories are related and thus grouped into a red box with a dashed line separating the two available options. In VarSheet, *Housing&Transportation* is called a *dimension*—a choice users have to make. A dimension contains a set of options, each being called a *tag*. *Housing&Transportation*'s tags are *Close* and *Far*. The *Loan Payment* dimension represents a different variation point with two tags *500* and *600* and thus is colored differently (green). The last variation point, the *Total* category, does not contain variational formulas by itself. The formula being used is  $\text{SUM}(B2:B6)$  and is non-variational, yet the cell inherits the variational structures of its referred cells and hence contains four available options. This cell is therefore colored purple to indicate that it contains *induced variation*. Showing all the four alternatives of *Total* gives the student an overview of all the different options they have. Moreover, if the student selects the \$1450 alternative, VarSheet will automatically make decisions for *Housing&Transportation* and *Loan Payment*, and displays those decisions and the resulting spreadsheet to them. We call this feature *goal-directed selection*, the process of selecting spreadsheet variants based on certain goals.

The study of variational spreadsheets brings up several insights to current research on software variation. While traditional variation mechanisms focus on either the syntax or semantics domain, spreadsheets' immediate semantics computation expands the application of variational constructs to both domains, enabling the realization of goal-directed selection. In the example above, Loan payment varies syntactically while Total varies semantically, and one could even define cells that vary on both domains.

	A	B
1	Category	Monthly cost
2	Housing	500
3	Transportation	50
4	Food	300
5	Entertainment	100
6	Loan payment	600
7		
8	Total	1550

(a) Before

	A	B
1	Category	Monthly cost
2	Housing	450
3	Transportation	150
4	Food	300
5	Entertainment	100
6	Loan payment	500
7		
8	Total	1500

(b) After

	A	B
1	Category	Monthly cost
2	Housing	450
3	Transportation	150
4	Food	300
5	Entertainment	100
6	Loan payment	500
7		
8	Total	1500
9		1450

(c) A Possible User Interface

Figure 1: A Monthly Spending Spreadsheet

4	Food	Grocery	200
5		Dining	100

Figure 2: A Different Way to Represent the Food Category

Existing variational constructs mainly work on linear or tree structures, which localizes their scope of impact. Spreadsheets have a special two dimensional structure that makes localization hard to achieve. For instance, in Figure 1a, one could replace row 4 by the spreadsheet in Figure 2 and expects this variation introduction to be local. This action unfortunately has a global impact on the spreadsheet's structure and the addresses/values of several unrelated cells. The Monthly Cost column has to be shifted to column C, while the Total column has to be shifted one row down. In our variational spreadsheet model, we provide mechanisms to localize the effect of structural changes.

Lastly, by letting users actively define variation in spreadsheets, we remove the need for using spreadsheet diffing algorithm, which can be imperfect and misleading at times.

## II. BACKGROUND AND RELATED WORK

To be rewritten

Talk about the prototype of the VLHCC 2011 paper

Existing empirical research demonstrates the need for an effective approach to deal with spreadsheet variation. Spread-

sheet reusing is common, but users often have to choose from various options [citation needed]. Once a spreadsheet is chosen and several modifications have been made to it, if users recognize that it was not the right one to begin with, they will have to start all over again on a different one. This could happen for many times until users are happy with their choice. To mitigate this problem, VarSheet gives users the ability to modify multiple versions/spreadsheets at the same time on a single representation and select a desired version later. Another reason for spreadsheet variation is due to spreadsheet errors and debugging. Spreadsheets contain errors [8] [9], many of which are introduced in the process of reusing and modifying existing spreadsheets. When debugging, users often need to show the differences between multiple versions, so a framework for systematically managing changes is needed.

In the area of spreadsheet change support, existing tools can be classified into two big categories: change tracking tools and spreadsheet diffing tools. One representative example of a change tracking tool is Microsoft Excel’s change tracking feature, which provides users the ability to track spreadsheet edits such as inserting rows, updating equations, etc. This tool is useful and effective in helping users understand versioning information of spreadsheets but is not without limitation. The entire variational spreadsheet is represented using only the time dimension. It is not possible to group changes into categories or groups such that they can be undone or applied again. Another problem arises when two or more users copy and modify the same original spreadsheet. When trying to merge the modified copies, it is unclear which change includes or excludes other changes. For VarSheet, grouping changes could simply be resolved by changing dimension/choice names, which will be defined in the next sections. Research and commercial tools for diffing spreadsheets are prevalent, including CC DiffEngineX [1] and Synkronizer [2]. These tools are effective in comparing spreadsheets and producing accurate results. However, they do not reveal the original purposes of users’ changes and do not provide a way to document those.

On a broader topic, there has been extensive research on the topic of representing and managing software variation. The two big pillars of this topic is the compositional approach [6], which modularizes software product line features [4] into individual folders and describes variability at a higher level using feature models [3], and the annotated approach [6], where variability is encoded and represented inside source code. Since there are advantages and disadvantages for each approach, Erwig and Walkingshaw [5] designed the Choice Calculus to shorten the gap between them and to take advantage of the approaches’ benefits. The Choice Calculus’s design is based on the idea that software variation should be done at both source code and higher levels with not-too-restrictive and not-too-relaxed constraints, making it highly applicable for tree-like structures. VarSheet expands Choice Calculus’s ideas of dimensions and choices to the spatial, two dimensional structure of spreadsheets.

### III. DIMENSIONS AND DECISIONS

A *dimension* describes one way in which something varies. For example, *Housing&Transportation* in our example in Figure 1 is one dimension of variation. A *dimension definition* assigns a *dimension name* to a non-empty set of *tags*, which correspond to the alternatives in that dimension. A dimension definition is written as  $D = \{t_1, \dots, t_n\}$ , for example,

$Housing\&Transportation = \{Close, Far\}$ . A *qualified tag* is a tag prefixed by the name of the dimension it is taken from, written  $D.t_i$ . Qualified tags are used to distinguish between tags of the same name from different dimensions. Given a qualified tag  $q = D.t$ , we can extract the dimension name with the function  $dim(q) = D$ .

A *decision space* of *degree*  $n$  is given by a set of  $n$  dimension definitions  $D^n = \{D_1 = T_1, \dots, D_n = T_n\}$  where  $T_i$  is the set of tags for dimension  $D_i$ . We define the function  $dims(D^n) = \{D_1, \dots, D_n\}$  to return the set of all dimension names in a decision space. The *tag universe* of decision space  $D^n$ , written  $Q_{D^n}$ , is the set of all qualified tags in  $D^n$ , defined as  $Q_{D^n} = \{D.t \mid D \in dims(D^n) \wedge t \in D\}$ .

A *decision* in a decision space  $D^n$  is a set of qualified tags  $\delta \subseteq Q_{D^n}$  that contains at most one tag for each dimension, that is,  $q, q' \in \delta \implies q = q' \vee dim(q) \neq dim(q')$ . We overload the function  $dims$  to also denote the dimension names of a decisions, that is,  $dims(\delta) = \bigcup_{q \in \delta} dim(q)$ . A decision  $\delta \subseteq Q_{D^n}$  is *complete* if it contains a qualified tag from every dimension in  $D^n$ , that is, if  $dims(\delta) = dims(D^n)$ , otherwise it is *partial*.

### IV. VARIATIONAL SPREADSHEETS

A variational spreadsheet represents a family of related plain spreadsheets, each being called a *variant*. Figure 1a and 1b show two of the four variants of the monthly spending spreadsheet. Each variant contains a subset of a universe set of *variational cells*.

Variational cells encode information about which variants the cells belong to, where they appear in the two-dimensional grid structure, and what types of content they store. Each variational cell has an unique address  $a$  from the set  $A$ . A function  $V : A \rightarrow 2^{Q_{D^n}}$  maps the address to a subset of the tag universe. The purpose of  $V$  is to decide if a cell is selected after a decision is made. Each cell also contains a *formula*  $f \in F$ , which can be a value, an address reference, or a function on other formulas.

$f \in F ::=$	$v$	values
	$a$	identity references
	$\omega(f, \dots, f)$	functions

In the above definition,  $F$  represents the set of all formulas,  $v$  ranges over primitive values (integers, etc.), and  $\omega$  stands for the set of all possible functions. We define a function  $\varphi : A \rightarrow F$  to map cell addresses to formulas and a function  $\pi : A \rightarrow P$  to generate *relative positions* given cell addresses. Relative positions  $p = (\mathbb{N}, \mathbb{N})$  are stored as pairs of natural numbers and are used to aid a pretty printing algorithm in computing cells’ absolute positions on two-dimensional grids. The first number in  $p$  represents relative vertical positions while the second represents horizontal positions.

A variational spreadsheet combines a decision space  $D^n$  and the universe set of variational cells and is defined by the tuple  $(D^n, V, \varphi, \pi)$ .

In Figure 3 we provide two variants of a variational spreadsheet containing a single dimension  $D = \{D.1, D.2\}$ . Relative positions are shown on the top-right corner of each cell, and cell addresses are shown on the top-left corner. The universe set of cells contains all the cells with addresses #1–10. We leave the contents of several cells blank as they are not important for our discussion. The cell at address #2’s formula is #5 + 1, yet the formula is pretty printed as C1 + 1 and D1 + 1 since cell #5’s grid position changes from one variant

to another. Two different types of cells exist in Figure 3, *non-variational* and *variational* cells. Non-variational cells are cells that appear in all variants whereas variational cells do not. Non-variational cells' tags are the tag universe set  $Q_{D^n}$ , and variational cells' tags are proper subsets of  $Q_{D^n}$ . We provide the cells' tags below.

$$\begin{aligned} \#1, \#2, \#5, \#6 & : \{D.1, D.2\} \\ \#3, \#4 & : \{D.1\} \\ \#7, \#8, \#9, \#10 & : \{D.2\} \end{aligned}$$

The pretty printing algorithm places the cell with the lowest horizontal and vertical positions at the position A1 and recursively adds cells to the grid based on the following conventions.

- Cells with the same vertical position are on the same column. Cells with the same horizontal position are on the same row.
- For all pairs of cells  $x$  and  $y$ , if  $x$ 's horizontal position is less than  $y$ 's,  $x$ 's row number has to be less than  $y$ 's.
- For all pairs of cells  $x$  and  $y$ , if  $x$ 's vertical position is less than  $y$ 's,  $x$ 's column number has to be less than  $y$ 's.

## V. SEMANTICS

The pretty printing algorithm works on individual variants, which are selected by picking a subset of cells from the cell universe. A natural question is how do we know which cell to pick. To answer this question, in this section we describe *variation semantics*, a mapping between complete decisions and spreadsheet variants.<sup>1</sup>

The steps involved in computing variation semantics are: (1) generating all complete decisions, (2) performing *tag selection* on those decisions to label each cell with either checked (✓) or crossed (✗), and (3) collect all checked cells into variants.

### Dimensions and Complete Decisions

The set of complete decisions of a variational spreadsheet  $s$  is defined below with  $D^n$  being  $s$ 's decision space.

$$\text{decisions}(s) = \{ \{D_1.t_1, \dots, D_n.t_n\} \mid \{D_1, \dots, D_n\} = \text{dims}(D^n) \wedge t_i \in D_i \}$$

### Tag Selection

## VI. PARTIAL TAG SELECTION AND GOAL-DIRECTED SELECTION

Variation semantics works with complete decisions, which is applicable when users could make decisions for all dimensions. In practice, users might not know all decisions in advance. They might make decisions for some dimensions, observe the outcome, and then either undo or reiterate the process. We introduce the notion of *partial tag selection* to support users in making partial decision. Partial tag selection takes a variational spreadsheet and a decision as input and returns another variational spreadsheet. When the input is a complete decision, partial tag selection returns a variant. For instance, when applying the incomplete decision  $\{Housing \& Transportation.Close\}$  on the spreadsheet in Figure 1, we obtain a spreadsheet with *Loan Payment* as the only

dimension and the costs of housing and transportation become non-variational.

Formally, the partially tag selection operation  $[\ ]^p : S \times 2^t \rightarrow S$  is defined as

$$[s]_{ts}^p = \{update(c, ts) \mid c \leftarrow s, tags(c) \sim ts\}$$

The *update* operation removes all tags in  $ts$  from cell  $c$ 's tags. If  $tags(c) \subseteq ts$ ,  $c$ 's tags becomes empty and the cell becomes non-variational. The  $\sim$  relation returns true if two sets of tags do not have conflicts in decisions, that is, for every shared dimension, corresponding tags must be the same. For instance,  $\{D_1.t_1, D_2.t_2\} \sim \{D_1.t_1\}$  holds while  $\{D_1.t_1, D_2.t_2\} \sim \{D_1.t_1', D_2.t_2\}$  does not.

$$ts_1 \sim ts_2 = \forall D, D.t_1 \in ts_1 \wedge D.t_2 \in ts_2 \rightarrow t_1 = t_2$$

Goal-directed selection is defined as partial tag selection on variational spreadsheets. Users begin by inspecting all possible values of a cell. In Figure 1c, the cell being inspected is B8 and has four possible values, each corresponding to a partial decision (In this example specifically, the partial decisions happen to be the complete decisions). The alternative 1450 corresponds to the decision  $\{Housing \& Transportation.Close, Loan.Payment.500\}$ , which could be applied to the spreadsheet to obtain a single variant.

We simplify our discussion by looking four variants of a simpler spreadsheet in Table I...

TODO: (0) Provide a simpler example to talk about goal directed selection and syntactic sugar, (1) Talk about syntactic sugar (address referencing) here to enable goal-directed selection, (2) Describe goal-directed selection in more details, (3) Syntactic revisit: how to show all variants of a cell at a certain address?

## VII. LANGUAGE PROPERTIES

### Theorem 1.

*Proof:* ... ■

TODO: Add three more theorems: (1) C-S equivalent (choice expansion), (2) Reduction of tags, (3) Dimension dependency theorem

## VIII. CONCLUSION AND FUTURE WORK

TBD

## REFERENCES

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<sup>1</sup>Note that we ignore the discussion about the semantics of individual variants since they are basically the semantics of plain spreadsheets.

	A	B	C
1	1 (1,1)	3 (2,1)	5 (4,1)
2	2 (1,2) =C1+1	4 (2,2)	6 (4,2)

(a) Variant 1

	A	B	C	D
1	1 (1,1)	7 (2,1)	9 (3,1)	5 (4,1)
2	2 (1,2) =D1+1	8 (2,2)	10 (3,2)	6 (4,2)

(b) Variant 2

Figure 3: Two variants of a variational spreadsheet

	$D_1$	$D_2$																								
$D'_1$	<table> <tr> <th></th><th>A</th><th>B</th></tr> <tr> <td>1</td><td>1 Price (1,1)</td><td>4 100 (2,1)</td></tr> <tr> <td>2</td><td>2 Tax (1,2)</td><td>6 0.06 (2,2)</td></tr> <tr> <td>3</td><td>3 Total Cost (1,3)</td><td>8 =#4*(1 + #6) (2,3)</td></tr> </table>		A	B	1	1 Price (1,1)	4 100 (2,1)	2	2 Tax (1,2)	6 0.06 (2,2)	3	3 Total Cost (1,3)	8 =#4*(1 + #6) (2,3)	<table> <tr> <th></th><th>A</th><th>B</th></tr> <tr> <td>1</td><td>1 Price (1,1)</td><td>5 110 (2,1)</td></tr> <tr> <td>2</td><td>2 Tax (1,2)</td><td>6 0.06 (2,2)</td></tr> <tr> <td>3</td><td>3 Total Cost (1,3)</td><td>9 =#5*(1 + #6) (2,3)</td></tr> </table>		A	B	1	1 Price (1,1)	5 110 (2,1)	2	2 Tax (1,2)	6 0.06 (2,2)	3	3 Total Cost (1,3)	9 =#5*(1 + #6) (2,3)
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$D'_2$	<table> <tr> <th></th><th>A</th><th>B</th></tr> <tr> <td>1</td><td>1 Price (1,1)</td><td>4 100 (2,1)</td></tr> <tr> <td>2</td><td>2 Tax (1,2)</td><td>7 0.09 (2,2)</td></tr> <tr> <td>3</td><td>3 Total Cost (1,3)</td><td>10 =#4*(1 + #7) (2,3)</td></tr> </table>		A	B	1	1 Price (1,1)	4 100 (2,1)	2	2 Tax (1,2)	7 0.09 (2,2)	3	3 Total Cost (1,3)	10 =#4*(1 + #7) (2,3)	<table> <tr> <th></th><th>A</th><th>B</th></tr> <tr> <td>1</td><td>1 Price (1,1)</td><td>5 110 (2,1)</td></tr> <tr> <td>2</td><td>2 Tax (1,2)</td><td>7 0.09 (2,2)</td></tr> <tr> <td>3</td><td>3 Total Cost (1,3)</td><td>11 =#5*(1 + #7) (2,3)</td></tr> </table>		A	B	1	1 Price (1,1)	5 110 (2,1)	2	2 Tax (1,2)	7 0.09 (2,2)	3	3 Total Cost (1,3)	11 =#5*(1 + #7) (2,3)
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Table I: Four Variants of the Receipt Spreadsheet

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