The Symbolic Data Project in a Computer Algebra Social Network Perspective. Some Architectural Considerations

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Abstract. On March 1, 2016, version 3.1 of the SYMBOLICDATA database was released. With the new release the SYMBOLICDATA Project offers new, recompiled and extended data and introduces an adjusted git repo structure. The *main goal* of the new release was directed towards an architectural redesign of the CASN subproject with the following main tasks:

- Enlarge the SymbolicData People database both in the number of instances and with valuable additional information for author disambiguation – one of the great challenges of all catalogue systems.
- Strengthen the notion of a local CASN node maintained by a CA substructure as basis of an upcoming federated network of such nodes.
- Reorganize the CASN data collected so far according to these adjusted conceptional basis using established semantic web best practices.

In this paper we explain the conceptional background of such a redesign in more detail and put it in the context of some architectural considerations.

1 Introduction

The allocation of resources for a sustainably available research infrastructure seems to be a great challenge in particular to smaller scientific communities. The SYMBOLICDATA Project witnesses the peaks and troughs of such efforts. It grew up from the Special Session on Benchmarking at the 1998 ISSAC conference in a situation where the research infrastructure built up within the PoSSo [18] and FRISCO [5] projects – the Polynomial Systems Database – was going to break down. After the end of the projects' fundings there was neither a commonly accepted process nor dedicated resources to keep the data in a reliable, concise, sustainably and digitally accessible way. Even within the ISSAC Special Session on Benchmarking the community could not agree upon a further roadmap to advance that matter.

At those times almost 20 years ago most of the nowadays well established concepts and standards for storage and representation of research data did not yet exist – even the first version of XML as a generic markup standard had to

be accepted by the W3C. It was Olaf Bachmann and me who developed during 1999–2002 with strong support by the Singular group concepts, tools and data structures for a structured representation and storage of this data and prepared about 500 instances from *Polynomial Systems Solving* and *Geometry Theorem Proving* to be available within this research infrastructure.

The main conceptional goal was a nontechnical one – to develop a research infrastructure that is independent of (permanent) project funding but operates based on overheads of its users. This approach was inspired by the rich experience of the Open Culture movement "business models" to run infrastructures. It was an early attempt to emphasize the advantage of an explicitly elaborated concept of a community-based solution to the "tragedy of the commons" [8] within the CA community and to apply such a concept to run a part of its research infrastructure. Even 15 years later it remains difficult to keep the Symbolic Data Project running on such a base.

During the last ten years with Open Access, Open Data and the emerging semantic web the general understanding of the importance of such community-based efforts to develop common research infrastructures matured. This development was accompanied with conceptual, technological and architectural standardization processes that had also impact on the development of concepts and data structures within the SymbolicData Project. In 2009 we started to refactor the data along standard Semantic Web concepts based on the Resource Description Framework (RDF). With SymbolicData version 3 released in September 2013 we completed a redesign of the data along RDF based semantic technologies, set up a Virtuoso based RDF triple store and an SPARQL endpoint as Open Data services along Linked Data standards, and started both conceptual and practical work towards a semantic-aware Computer Algebra Social Network.

Since then we continued that development. On March 1, 2016, version 3.1 of the Symbolic Data tools and data was released. The new release contains

- new resource descriptions ("fingerprints" in the notion of [7]) of remotely available data on transitive groups (*Database for Number Fields* of Gunter Malle and Jürgen Klüners [12]) and polytopes (databases of Andreas Paffenholz [16] within the *polymake* project [6]),
- a recompiled and extended version of test sets from integer programming work by Tim Römer (normaliz group [1]) –,
- an extended version of the $SDEval\ benchmarking\ environment$ work by Albert Heinle [9] and
- a partial integration (SYMBOLICDATA People database, databases of upcoming and past conferences) of data from the CASN the Computer Algebra Social Network subproject.

Moreover, the github account https://github.com/symbolicdata was transformed into an organizational account and the git repo structure was redesigned better to reflect the special life-cycle requirements of the different parts and activities within SymbolicData. We provide the following repos

- data the data repo with a single master branch mainly to backup recent versions of the data,
- code the code directory with master and develop branches,
- maintenance code chunks from different tasks and demos as best practice examples how to work with RDF based data,
- publications a backup store of the L⁴TEX sources of SYMBOLICDATA publications
- web an extended backup store of the SYMBOLICDATA web site that provides useful code to learn how RDF based data can be presented.

The old repo *symbolicdata* is deprecated and was removed from the github account, so please adjust your local repo structure. The main development is coordinated within the SymbolicData *Core Team* (Hans-Gert Gräbe, Ralf Hemmecke, Albert Heinle) with direct access to the organizational account. We refer to the SymbolicData Wiki [26] for more details about the new release.

All changes reported so far are mentionable advances of the SYMBOLICDATA Project. Nevertheless the *main goal* of the new release was directed towards an architectural redesign of the CASN subproject with the following main tasks:

- Enlarge the SYMBOLICDATA People database both in the number of instances and with valuable additional information for author disambiguation
 one of the great challenges of all catalogue systems, see, e.g., VIAF [27].
- Strengthen the notion of a local CASN node maintained by a CA substructure as basis of an upcoming federated network of such nodes in a first step such a node exposes valuable information in RDF as files for download and further exploration in a local RDF store.
- Reorganize the CASN data collected so far according to this adjusted conceptual basis using established semantic web best practices.

In this paper we explain the conceptual background of such a redesign in more detail and put it in the context of some architectural considerations.

2 Semantic Web as Web of Data

At about 2000 a crucial redesign of the web started to increase its potential for deeper and more intense social cooperation. Notions as Web 2.0, Web 3.0, Web of Data or Semantic Web were coined to reflect about such developments from an – in the first place – technical point of view. Shortly it turned out that many of the effects of the "Web 2.0" were based on the new digital concepts and tools but in fact were triggered by new *opportunities of social interaction* and could not be reflected properly by a technologically centered approach. The competing notion of Social Web emphasized such aspects and the proponents of a more infrastructural-technical approach coined notions as Web 3.0 or – within the W3C since the end of 2013 – Web of Data.

The notion of *Semantic Web* addressing mainly standardization processes is located in the middle between both perspectives. The English Wikipedia [20] puts it as follows:

The Semantic Web is an extension of the Web through standards by the World Wide Web Consortium (W3C). The standards promote common data formats and exchange protocols on the Web, most fundamentally the Resource Description Framework (RDF).

According to the W3C, "The Semantic Web provides a common framework that allows data to be shared and reused across application, enterprise, and community boundaries". The term was coined by Tim Berners-Lee for a web of data that can be processed by machines. ... In 2006, Berners-Lee and colleagues stated that: "This simple idea ... remains largely unrealized".

Semantic Web remains to be a complex socio-technical field, and in Berner-Lee's statement optimism and pessimism are close together – the optimistic perspective concerns the potential of the ongoing development and the pessimistic one the time horizon of that development to mature.

The core of the (technical) vision of a "semantic web as web of data" is an architectural change of the web itself. Web 1.0 started and matured as a web of interlinked presentations, in the first time as hyperlinked static HTML pages connected via the HTTP hypertext protocol. Modern web engines deliver dynamically generated HTML code (in many cases with additional Javascript driven visualization code and dynamic effects) and provide interlinking of specially prepared information pieces between different presentation layers – the "content". Such web applications are typically designed along a 3-tier architecture with data layer, business or model layer and presentation layer. All modern web frameworks and web design pattern as, e.g., the Model-View-Controller (MVC) or the Presentation-Abstraction-Control (PAC) pattern, support and presuppose such a layered architecture. The main drawback of such an architecture is its tight coupling within a local web server and its direction towards information supply ready for use, i.e., provision of interpreted data, mainly controlled by the needs and world perception of the information providers.

Unfortunately, information reveals usefulness often enough in new, unexpected contexts, not foreseen and even not predictable by the information providers. This is the starting point of the vision of the semantic web – use existing protocols, in particular HTTP, to connect the data layers directly and to combine "uninterpreted" data from different sources in machine readable form under the control (and interpretation) of the *data user*, not the data provider.

3 Data Architects and the Semantic Web as Social Web

A deeper analysis of the problem reveals that there is no (interesting) "uninterpreted" data. A bit stream of data exchanged between two computers can, e.g., represent a picture, if the computer recognizes the image format (analyzing the file name extension or detecting an appropriate pattern prefix in the bit stream – a standard to be agreed upon *before* exchanging the first picture, and even before writing such a program), and the computer can "interpret" the bit stream starting a special algorithm to render the picture. The picture itself is

"reinterpreted" once more by the user who called that picture with a certain goal in mind. Such multilevel interpretational processes are ubiquitous in the web and it is one of the difficult problems to harmonize such interpretational frames within social communication rooms.

Thus one of the central challenges of digital communication is the coordination of conceptual and notational conventions on a level of detail that can be algorithmically processed by digital machines. Nowadays the most successful semantic web projects address domains with sophisticated taxonomies and systematics well established already in a predigital era that have "only" to be fully formalized for digital use. All other tasks of semantic web standardization turn out to be much more complicated and require social virtues as open mind, open culture, empathy and readyness for cooperation compared to well established virtues as rivalness and competitiveness.

Such requirements led to a completely new job profile within computer science – in addition to *software architects*, who are responsible for a reasonable program architecture within a single application or application system, nowadays we have *data architects* to design and (socially) implement powerful comprehensive data models ("ontologies") for interpretational frames that facilitate cooperation between applications from different domains or, more precisely, between the users of those applications.

The systematic development of such ontologies can be supported by tools but is in its core a socially triggered process. Thus from the perspective of a data architect the web is more a web of people driven by different interests and goals using and producing data as a web of data. The "web of data" metaphor masks not only the users of this data and their goals but also the coordination processes required to use the "web of data" in a sound way. It is a great challenge for data architects to design not only technical and notational architectures (and models) but also processual and social architectures to get the semantic web mature.

RDF as language concept and framework offers its strength in such a domain – due to its generic concept RDF is appropriate to be used for modelling processes at both the data and the metadata level and can be used to describe not only data (resources in the RDF terminology) but also data structures (resource descriptions in the RDF terminology), metadata structures (languages or metameta models in other terminologies) and descriptions at even more elaborated abstract levels to support processual and even social cooperation.

4 OpenDreamKit and the MathHub.info Project

Semantic web concepts largely influenced also the research infrastructure of science. Within the domain of mathematics there are big projects on the way as WDML [17, 30] or EuDML [3] and also smaller ones as the semantification of the MSC2010 index [14] or the swMATH project [22].

Beyond such domain-specific efforts there is not only *Google Scholar* but much more combined e-science projects with global scope are on the way to

support and restructure scholarly communication using semantic technologies as, e.g., VIVO¹, VIAF² or OCLC³.

During the last years also the funding agencies increasingly noticed the importance of the digital extension of research infrastructures, see, e.g., the ESFRI Roadmap 2016 [4]. In particular, on 17 April 2015 the EU funding agency published a call "European Research Infrastructure" [10] within the Horizon2020 Work Programme 2014–2015 with focus on

- e-infrastructure for Open Access
- Research Data Alliance
- High Performance Computing
- Research and Education Networking
- Virtual Research Environments
- Support measures to innovation, human resources etc.

First of all notice, that also the promotion strategy of the EU funding agency is orthogonal to the "web of data" debates, strongly aims at *social practices* that already proved to be successful and focuses on proposals to reinforce such *practices* and not the infrastructure itself. Further infrastructural development and thus the "web of data" is considered rather as an aspect of continuation and institutionalization of successful social practices thus performing a funding practice that is oriented at intrinsically motivated processes of academic self organization compared to a system of externally triggered patronage. For primarily politically motivated funding practices this is a quite remarkable development.

Similar aspects can be observed for the *OpenDreamKit Project* [15] that was successful within the above mentioned subcall on Virtual Research Environments. It was awarded not for promising to develop such an environment but since *successful cooperative practices* in the area of mathematical software as "toolkit for the advancement of mathematics" were already developed during the last years, notably around the SageMath Project [19] despite adverse funding conditions. The proposed development direction towards a (also socially highly distributed and interconnected, i.e., *organismically* structured) "sustainable ecosystem of community-developed open software, databases, and services" is emphasized in the project's abstract [15]:

OpenDreamKit will be built out of a sustainable ecosystem of community-developed open software, databases, and services, including popular tools such as LinBox, MPIR, Sage (sagemath.org), GAP, PariGP, LMFDB,

¹ http://vivoweb.org. "... VIVO supports recording, editing, searching, browsing and visualizing scholarly activity. VIVO encourages research discovery, expert finding, network analysis and assessment of research impact. ...". [28]

² "The Virtual International Authority File (VIAF) is an international service designed to provide convenient access to the world's major name authority files. ...". [27]

³ "A global library cooperative that provides shared technology services, original research and community programs for its membership and the library community at large". http://oclc.org

and Singular. We will extend the Jupyter Notebook environment to provide a flexible UI. By improving and unifying existing building blocks, OpenDreamKit will maximize both sustainability and impact, with beneficiaries extending to scientific computing, physics, chemistry, biology and more and including researchers, teachers, and industrial practitioners.

Such an emphasis on *social interaction* is set explicitly also on the project's reflection focus: "Our architecture will be informed by recent research into the sociology of mathematical collaboration, so as to properly support actual research practice" [15].

Since public funding policies are driven mainly by territorially oriented political structures and decision processes it is a great challenge to smaller academic communities that are usually structured thematically and not territorially to adopt such developments for their own scientific communication processes and to join forces with other scientific communities to get own requirements publicly recognized. The OpenDreamKit Project addresses the research infrastructure of mathematics as a whole, hence its target is a large enough academic community to generate funding on an EU level. The focus of the SymbolicData CASN subproject is directed towards the much smaller academic community of Computer Algebra researchers. Hence the problem to organize its own research infrastructure is different. I'll come back to this question in the next section.

In the remainder of this section I will discuss on the example of MathHub.info as subproject of OpenDreamKit in more detail the interplay between semantic technologies and their embedding into a funding structure for research infrastructures that is mainly driven by successful social practices.

Michael Kohlhase reported in two contributions [13,11] to the session *Projects and Surveys* at CICM 2012 and CICM 2014 about efforts to "develop a general framework – the Planetary system – for social semantic portals that support users in interacting with STEM⁴ documents ..." [13] and started with MathHub.info to build up such a research infrastructure. It is a very interesting approach to enrich established STEM technologies (in particular IATEX and arXiv) semantically and seems to be the only OpenDreamKit subproject that addresses semantic web concepts and tools explicitly.

In many cases such a situation runs the risk to be caught between the devil and the deep blue sea. Kohlhase described the design goal of the system in [11] as follows:

MathHub.info must satisfy two conflicting goals: On the one hand, it must be so generic that it is open to all logics and implementations; on the other hand, it must be aware of the semantics of the formalized content so that it can offer meaningful services.

Elaborated goals require elaborated tools and skilled users, even if "meaningful services" could be offered. The experience within the Symbolic Data Project

 $^{^4}$ STEM is a shortcut for "Science, Technology, Engineering, Mathematics".

indicates that such a design goal is very ambitious and requires a strategy of *social* communication on a long run to get its results to be accepted and tools to be used by the target community.

Running a research infrastructure and providing reliable access to it is a cross cutting concern [2] orthogonal to the core research concerns of any special interest groups. It is "nice to have" and "hard to get" even if it has plenty of advantages that Kohlhase described in [11] in such a way:

We claim that MathHub.info will resolve two major bottlenecks in the current state of the art. It will provide a permanent archiving solution that not all systems and user communities can afford to maintain separately. And it will establish a standardized and open library format that serves as a catalyst for comparison and thus evolution of systems.

This statement is a statement before the OpenDreamKit project matured. To promote his own core goal Kohlhase offers additional benefits that have not much to do with semantic technologies but address social needs and proposes social practices for the target community. Within OpenDreamKit this proposal encounters established practices of archiving, versioning, and evolution of the other subprojects. It remains to be seen to what extend Kohlhase succeeds to tie semantic concepts and technologies into such a context with established practices that previously were mainly unaware of such semantic concepts. In the pre-OpenDreamKit time the main problem was to develop sustainable social practices around semantic concepts, the new challenge is to integrate semantic concepts into established (social) practices.

Let me close this section with another point. From an architectural point of view MathHub.info tries to integrate elements of a local working place environment and access elements to a global infrastructure that has yet to emerge. The main focus, see fig. 1 in [11], lies on the functionality of a local working place environment. The structural aspects of the formation of a global data infrastructure remain hidden in the boxes "MMT" and "GitLab" in that figure. Thus the design focuses on software architectural aspects and does not address the (social) requirements of data architecture building processes.

Ten years of semantic web experience indicate that data architectural aspects are in the core of the building processes of the "web of data" and require social organization in such a way that the (yet emerging) global data structure fits with a large number of *different* software frameworks and architecture models nowadays in use at local sites.

5 Extending the Symbolic Data Store

During the last years the SYMBOLICDATA Project adjusted its focus to address also more general technical and social aspects of a semantically enriched research infrastructure within the domain of Computer Algebra based on RDF for representation of intercommunity and relational information.

Such a change of the focus had its impact on several earlier design decisions of the data store itself. Enlarging the database of SymbolicData we gained the following experience:

- The CA community consists of several subcommunities with own concepts, notational conventions, semantic-aware tools and established communication structures
 - There is no need to duplicate such structures but to support the subcommunities to enrich semantically these communication processes.
- We provide structural metadata ("fingerprints" in the notion of [7]) of the different data sets at our central RDF store [24] but not necessarily duplicate the data itself.
 - Thus we rely on sustainably available research infrastructures of CA sub-communities and restrict our activities to a central search and filter service on the metadata level to find and identify data. This service is based on a generic semantic web concept, the SPARQL query language, and can be accessed via our SPARQL endpoint [25].
 - We applied this principle to the newly integrated data sets on polytopes and on transitive groups and also within the recompiled version of test sets from integer programming. Data are hosted by the *polymake* group [6], within the *Database for Number Fields* [12] and by the *normaliz* group [1].
- RDF is a useful and meanwhile well established standard for metadata and relational information, but there is no need and one cannot expect from CA subcommunities to give up established notational conventions in favour of RDF or XML markup.
 - Semantic-aware tools of the subcommunities are well tuned for the established notational conventions, and representation of data in a different format requires additional transformation effort to use it.
 - Moreover, one can use MathML or OpenMath standards and tools for the casual exchange of data. Note nevertheless, that the notational conventions of a subcommunity use many shortcuts that are valid only in a special interpretational frame (the "general nonsense" of the field, well known to the specialists) that is hard and probably unnecessary to formalize, since practical use of data from a special field requires a minimum of semantic-awareness of the user itself.

6 About the CASN Architecture

The CASN subproject tries to embed aspects of the maintenance of the SYMBO-LICDATA data store into a more general process of formation of a semantically enriched social network of academic communication within the CA community in the sense of a (social) "web of people" mentioned above.

As first question we had to decide about the range of such a social network. This is a difficult question from a "web of data" perspective but easily solved from a "web of people" perspective: To the network belong all individuals who count themselves as computer algebraists or are mentioned as such in communication

processes already covered by the CASN. For the moment this input comes mainly from three mailing lists – the [spp1489-gen] general mailing list of the SPP 1489 within the German Fachgruppe, the [SIGSAM-MEMBERS] mailing list and the [Om] mailing list of the OpenMath project. We installed our own mailing list [sd-announce] – for the moment mainly to forward selected mails from the [spp1489-gen] mailing list for archival purposes. Open list archives are required for referencing purposes in an (upcoming) semantically enriched CASN news channel.

A first roadmap towards such a CASN and our experimental setting was described in [7] and developed further during the last years. We try not to "reinvent the wheel" but to address the already existing "CA memory" – a huge number of very loosely related web pages about conferences, meetings, working groups, projects, private and public repositories, private and public mailing lists etc. Hence the main focus towards CASN is to develop a framework based on modern semantic technologies for a decentralized network that increases the awareness of the different parts of that already existing "CA network".

We realized that this network itself is an "overlay network" that connects a greater number of research networks of individuals around special topics with own lightweight research infrastructures. It is an interesting challenge for semantic concepts to support the requirements of intercommunity communication to exchange semantic content on different levels and different levels of detail.

As a coarse architectural concept to establish such a network we propose

- to operate a central RDF store with SPARQL endpoint providing the full bandwidth of Linked Open Data services and
- to convert nodes of the "CA memory" into CASN nodes providing part of their data in structured RDF format for easy access and exchange.

SymbolicData version 3.1 is a first step in that direction since

- several data from the formerly separate CASN RDF store are now integrated with the SymbolicData main RDF store [24] and
- the experimental setting of the semantic support of the website of the German Fachgruppe [29] was reorganized as a first CASN node.

CASN Integration into the Symbolic Data RDF Store

The CASN Integration into the SYMBOLICDATA RDF Store covers the following topics:

The RDF store provides information about scientific activities of people mainly extracted from conference announcements. The personal information is stored as instances of the RDF type foaf:Person with (as subset of) keys foaf:name, foaf:homepage and sd:affiliation (a literal). Due to privacy reasons we do not provide foaf:mbox (email) values.

This list is steadily enlarged and used as URI reference for reports about different activities (invited speakers, conference organizers etc.). As of March 2016 the SYMBOLICDATA People database contains 1036 foaf:Person entries from the CA scientific community that can be explored via the SYMBOLICDATA SPARQL endpoint [25] and also using the *CA People Finder* at the SYMBOLICDATA info page [23].

In August 2014 we compiled a first alignment of the Symbolic Data People database with the ZBMath author database to evalute the potential of a community-based author disambiguation and could resolve 348 matchings out of 678 persons. The result is available as ZBMathPeople RDF graph in our database.

- The RDF store provides information about upcoming CA conferences from several mailing lists, usually up to 20 entries with references to the SYMBO-LICDATA People database.
 - The information is extracted via SPARQL query and displayed both in the Wordpress based site of the German Fachgruppe [29] and at the SYMBOLIC-DATA info page [23].
- The RDF store provides information about past CA conferences with references to the Symbolic Data People database about speakers and organizers (as far as available).
 - Most of the entries were moved from the upcoming CA conferences list to that list for archiving purposes and aligned according to their archival status. As of March 2016 there are 139 records of past CA conferences.
 - A short set of information is extracted via SPARQL query and displayed at the SYMBOLICDATA info page [23].
- As another feature we started to provide semantic annotations to a subset of news (beyond conference announcements) posted on several mailing lists as instances of RDF type sioc:BlogPost. We operate a special mailing list sd-announce with archive and forward interesting news to that archive for URI reference if the original mailing list is not archived.
 - Such an annotation contains an excerpt of that message in a standardized way that can be explored at the Symbolic Data info page [23]. The concept can easily be extended to the concept of an CASN news channel.

The CASN node of the German Fachgruppe

The CASN node of the German Fachgruppe contains

- a list of (extended) FOAF-Profiles used to render, e.g., the page
 - http://www.fachgruppe-computeralgebra.de/fachgruppenleitung/,
- lists of current and former members of the board of the German Fachgruppe,
- (not up to date) information about German CA working groups,
- standardized information about the SPP 1489 projects with references to the SYMBOLICDATA People database,
- keyword enriched information about scientific publications in the CA-Rundbrief of the German Fachgruppe using the dcterms ontology,

- a survey on successfully defended CA dissertations in the scope of the Fachgruppe (a joint effort with the CA-Rundbrief) and
- a (also not up to date) list of CA books.

The data is available in RDF format for direct download from a web directory

http://www.fachgruppe-computeralgebra.de/rdf

as part of an upcoming global RDF data structure and can be harvested and processed within a local RDF store. The data is used in different PHP-based presentations that are summarized at

http://www.fachgruppe-computeralgebra.de/symbolicdata/

Best practice code how to embed such information into a Wordpress based website using the *EasyRDF* PHP library and also the code to operate the SYMBO-LICDATA info website [23] is available from our git repos *maintenance* and *web*.

The Symbolic Data CASN Node

We also operate a rudimentary Symbolic Data CASN node at the publicly accessible directory

http://symbolicdata.org/rdf/.

In the subdirectory Conferences we provide detailed information about five CA conferences (the SPP annual meeting in Bad Boll 2014 and the CICM conferences 2012–2015) as proof of concept of standardized detailed conference reports using the *Semantic Web Conference Ontology* [21]. The records provide information about the general venue, programme committes, tracks and talks of the conferences.

For the CICM conferences we exploited and transformed the publicly available XML-based representation developed by Serge Autexier to render the conference pages at http://cicm-conference.org as proof of concept. The main addition in our standardized detailed conference reports is the (semi-automatic) people disambiguation that easily allows to relate conference activities with other activities issuing a simple request to our SPARQL endpoint [25].

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