Theory of generation
.. some Ideas ..

The Zachman Framework for the reporting problem

- a first approach -

Preface

Within this document an overview is given for a framework, implementing a theory of generation. It is beyond it's scope, to design a framework in the classical manner. Instead, a loose collection of ideas is presented, that grew over a certain period in time, with always having the 'best-possible' generation toolkit in mind.
Subject of generation in principle can be all kind of documents. By the application of the Zachman Framework for software architecture, the most important issues, playing a role for generator theory, will be presented and discussed a bit.
As the idea for a theory of generation needs a simple approach for an overall method dealing with the documents to generate, a pragmatic decision is unavoidable. The Zachman Framework is the best known principle defining such an approach with respect to the author's knowledge.
To undermine the ideas explained here, the foxf software for report programming serves as an example, and is used to bridge the gap from academic background information to industrial reality.
For the application of the Zachman Framework with respect to generators, the next chapter gives an overview of the ideas behind. Last but not least, always keep Problem Frames in mind, Jackson rules.

to undermine the usually very abstract Ideas, a case study helps keeping the path for a discussion of important terms and concepts. all under the topic of generation.

The Zachman Framework

The Zachman framework for software architecture (abbr. ZF) helps organizing all kind of Software artefacts within a table like structure, consisting of columns and rows and therefore building particular cells. Each cell within that framework carries certain kinds of information with respect to some or the other formalism, meaning particular languages, textual and/or graphical. A very broad and mostly complete overview of languages can be found in [Hay 2002].

The application of this framework as found within here is a mere demonstration towards an implementation of Zachmans ideas using UML. The ZF rows and columns represent viewpoints and issues framing the content of a software's collection of documents.

To avoid confusion, some remarks regarding the scope of this document have to be made. This very model just names models, to be created for the documentation of the foxf-software, and/or names the kind of artefacts to be found for the different rows and columns.

the main idea behind the overall model:

- get a means that helps structuring the kinds and classes of documents found within particular software projects.

main scopes for academic purposes are the following:

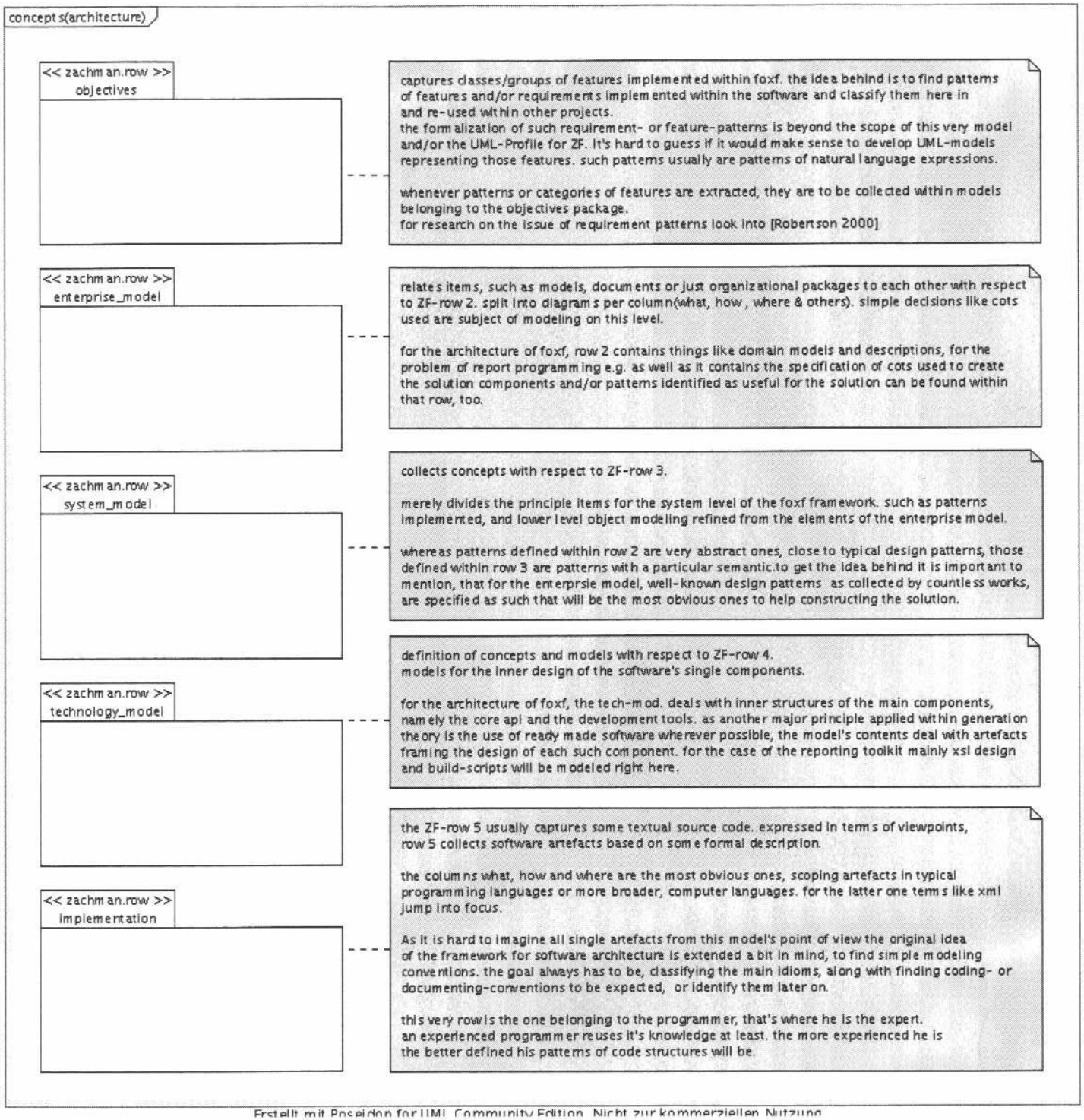
- simplify the re-use of all kinds of software artefacts
- find further classifications and patterns for all those documents

To start working towards an UML Profile for ZF, simple stereotypes are established by time and in the future. The idea behind those stereotypes as understood under the term of generation-theory is, to get a library developed for the goal of getting some generators for development-tooling code, not to confuse by production code.

Expressed a bit more practically, the build-scripts necessary for each project are subject of generation themselves. Further build-time software artefacts such as configuration files for metric tools like dependometer, are within the scope of such a profile too.
It can be argued quickly, that as the UML-Profile for ZF has to care about major artefacts only. Their type-modeling and classification is the task to do. models using that very profile could be titled 'project configuration models'. pre-generation of models to be developed, build-time code and others, should be a more realistic problem to solve then, having such a profile.
On the other hand Zachman's ideas don't mean a framework under the usual term's definition. Just having his ideas in mind helps controlling the expected complexity of overall generation.

as of this, the subject used for discussions is the problem of programming printable reports.
It is taken as a starter to get a generalization for documents to be generated.

deeper investigations of UML-profiles would be beyond our scope again. although,
some alternative ideas about their usage may be worth mentioning.



the best point to start a project-model, leaned towards Zachman's ideas simply is give the main-items some names. within the model scan, they represent nothing but rows.

the names selected, rely on the one found in [Zachman 1996]. no changes to the namings as chosen there are made, although it's likely to happen.

the Zachman framework and it's rows. crossing out points of view.

of course, major modules, better say, standalone applications, defined as logical assemblys within one project, could be taken for naming as well.

but right now this idea is far away from being expressable.

within today's software development it is common sense, that features and requirements have to be collected and maintained in a systematic manner.
tools that are subject of investigation are bug tracking systems like mantis, issue trackers and uncountable systems of all kind. software like scarab enables the definition, implementation and extension of all types of issues, bugs are one example for. scarab e.g. comes along with a meta-model, developers can adjust for their own needs.
having that in mind, the use of UML could be extended for the configuration of such customizations, too. as a framework for smart model-driven generation would be useful anyway. it is obvious, that using UML like done for the IT will move the focus to smart Profile-design. and the latter will have to be modeled again.

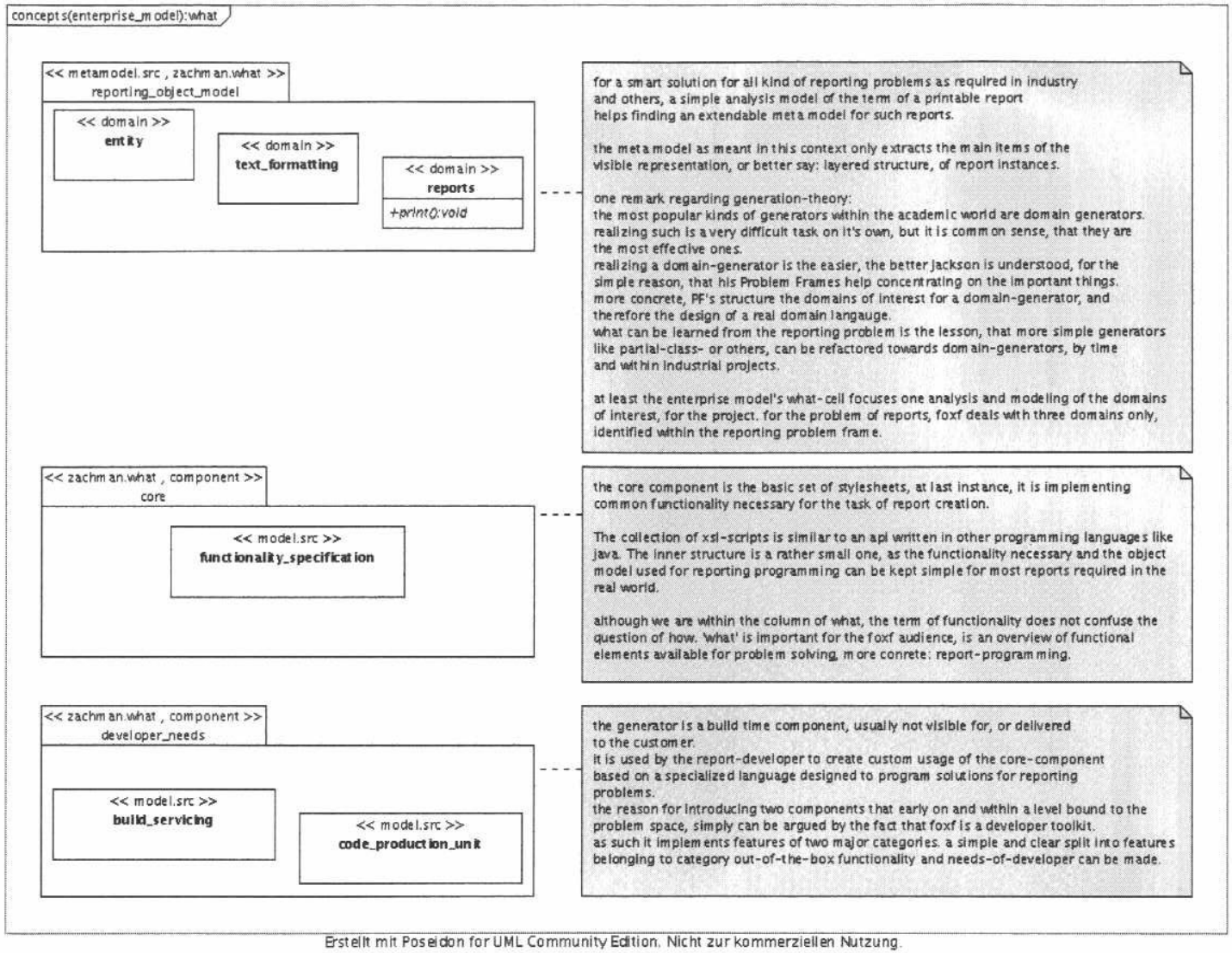
remarks on the different models:

for the distinction of the rows a short comparison is worth discussing. the system model is the first and most abstract classification with respect to the solution space. as such, service functions, or broader:
service-interfaces are things to be specified within the scope of ZF-row 3, something that the system developed provides as functionality to be used. the needs are located within the problem space, in terms of Zachman, rows 1 & 2. from the system designers point of view it is hard to predict the kind of patterns framing solutions realized by whatever programming language. the use of particular components-off-the-shelf (abbr. cots) frame the patterns and languages used, too. but anyway, within a model specifying nothing but the major artefacts classified as framing the software's architecture, typical functionality or all kinds of system-models scope the system's point of view.

more abstract again, the system model contains documents defining major components, service-implementations of service interfaces provided by cots and principle relationships between them.
the inner design of those components are bound to the tech. mod., that itself is influenced by decisions made earlier on, on questions of methods applied.

alternatively it can be remarked, that for the case of foxf row 3 defines low-level features to be used from developers, row 4 constrains their implementation. keeping that in mind will help understanding that patterns of row 3 may rely on simple design patterns, but beyond that, patterns as pattern-integrations of multiple patterns, and semantic enrichment scopes the artefacts contained in the system model.

originally Zachman did not talk about patterns and how they influence particular cells.
but anyway, patterns of all kinds help ordering those cells in a more general manner.



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the enterprise model's classes of things usually are organized within what are known as domain-models. the difficulty of understanding lies within the term of domains.
a very useful definition of the term can be found in [Jackson '96]. more concrete, his concept of problem frames helps finding s systematic approach for organizing the artefacts of interest from the analyzers point of view.
out-of-the box functionality means that part of the system, or say the software's architecture, the customer looks on. beyond that the developer has to do daily work to implement reports, or any other kind of software components. introducing components already within the problem space, simplifies clean generation of development-process implementing code.

within the mtk, a toolkit embedding the foxf or other software's developer functionality, the concept of component means exchangeable pieces of software. exchangeable with respect to installation and the like.

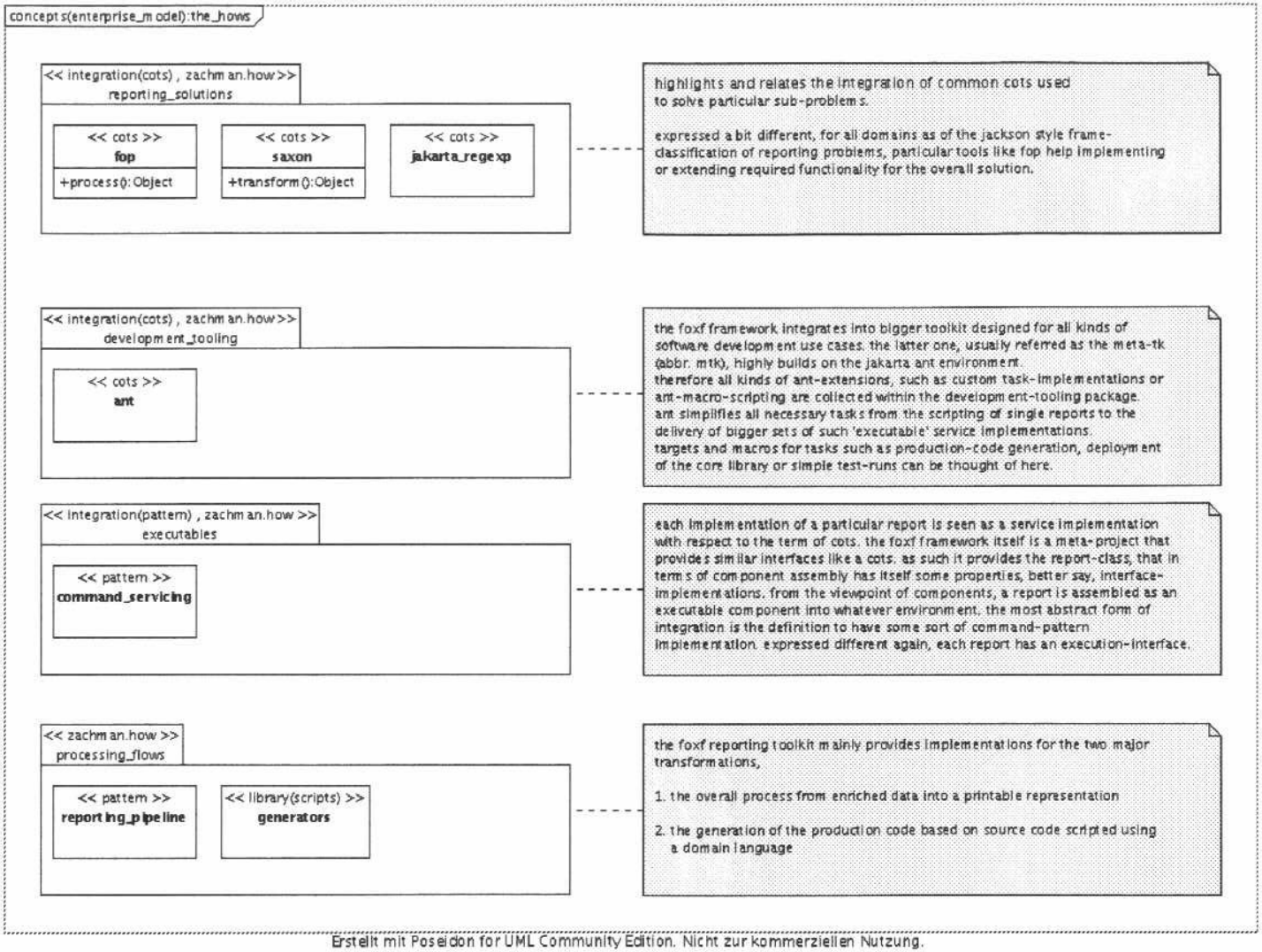
getting big pieces of software, that usually are assembled by components themselves and carry hand-crafted code beyond that, makes it worth thinking about standardization of build-time processing.

tools like ant provide simple scripting means that can help solving all kind of tasks for packaging, versioning and others, of such components or whatever piece of software.

the application of ZF, using UML, targets the principle relationships between whatever components are developed, ready-made used etc.
right now this idea of using UML is in it's early stages. on the other hand a real-work proven library of ant scripts is available already.
for the further development of this profile along with the library itself, once established model driven generation approaches jump into eye as another application for generation to care about.

code for build-scripting and the like is code on it's own. so it's obvious, that it's subject of generation, too.

the most effective approach of generation is seen in the use of domain languages. for the scope of enterprise models, the design of domain models, resulting in languages like that, is a hurdle to jump.
it is hard to guess, what it will take, to get a general method for domain-modeling, as it is a big research topic itself. Jackson does nothing but highlighting their importance and how they can be related.
but back to stuff like build-scripts, it is pretty clear, there are domains modeling applications of software engineering additionally, and like for any other type of problem. so be it. handle them like software-problem on their own.
why taking a different approach for the generation of build-time-, than for production-code. get the idea?!



the reporting problem's enterprise model, aka. the foxf implementation guidelines, mainly relate items useful for the solution. useful in terms of implementing the overlying system's features.

it is not important to care about the features themselves, but relating ready-made components and whenever possible, to highlight how they implement features as required already. at least to some extent features identified as useful one's for a general solution to the reporting problem are interest of modeling.

the term of cots is defined in different ways. some works are talking about commercial off-the-shelf, but the author's interpretation is taken from [Aßmann 2003], who calls them components-off-the-shelf.

besides that there are works caring about the differences between commercial and open-source. it is just not that important for the ZF for the time being, as discussing cots in all their variant forms is subject work a document on it's own.

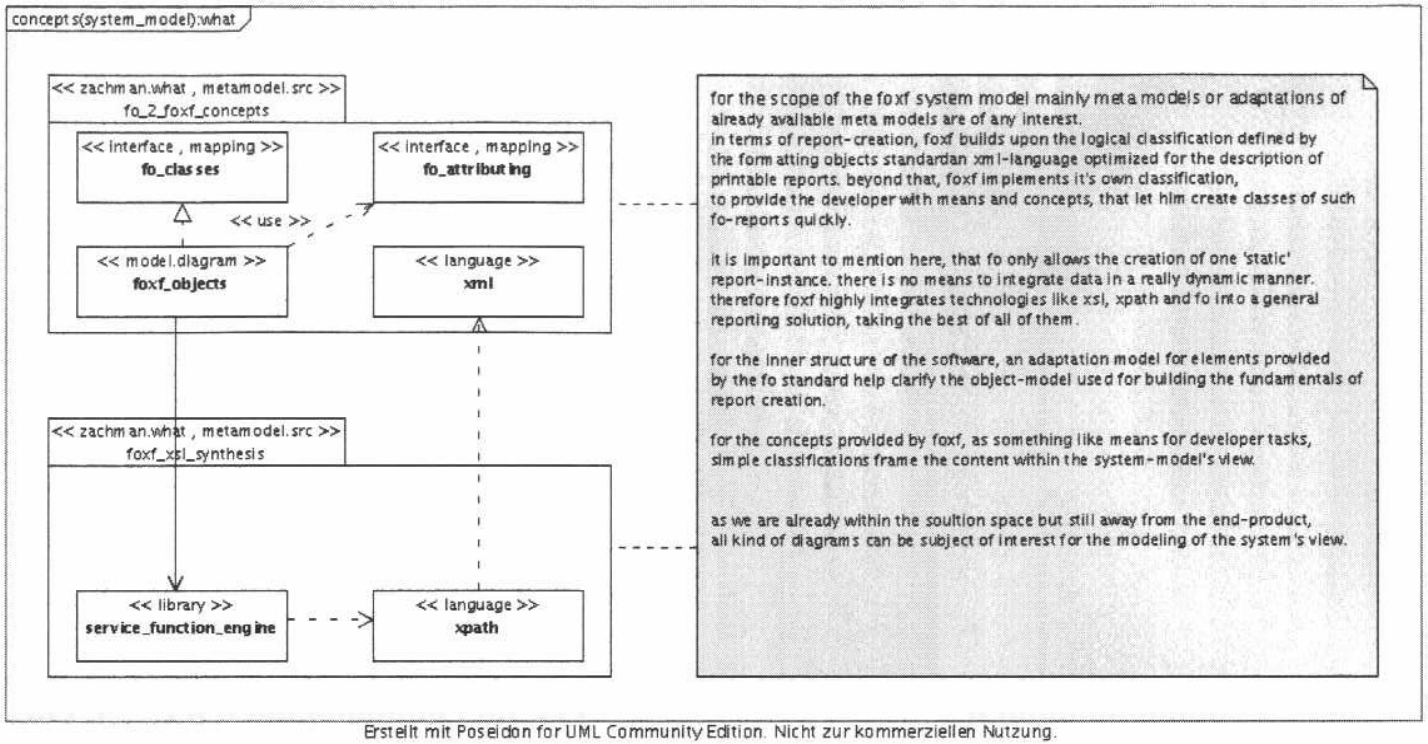
the mtk takes the usage of cots as an inner success guaranteeing method for code generation. it can be argued at least, that particular cots play one or the other role for the build-time artefacts generated from a ZF-UML-profile application.

the central application of cots-usage gets it's motivation from a completely different fact. just imagine the patterns they implement.

the enterprise model's column of laws is the one closest to what Jackson calls a PF's method, the approaches useful for the solution's implementation. as those might be as different like the problems they solve, simple things like cods used, patterns applied or defined, are the most obvious items to be contained within the project's enterprise law aspects.

those two items, cods & pattern, modeled as used for a custom software package, highly simplify tasks like deployment, or more general, build-time tasks of all kinds. be it to script them manually, or generate them.

btw. for the distinction of build-time and runtime look into [Bassett 1996].

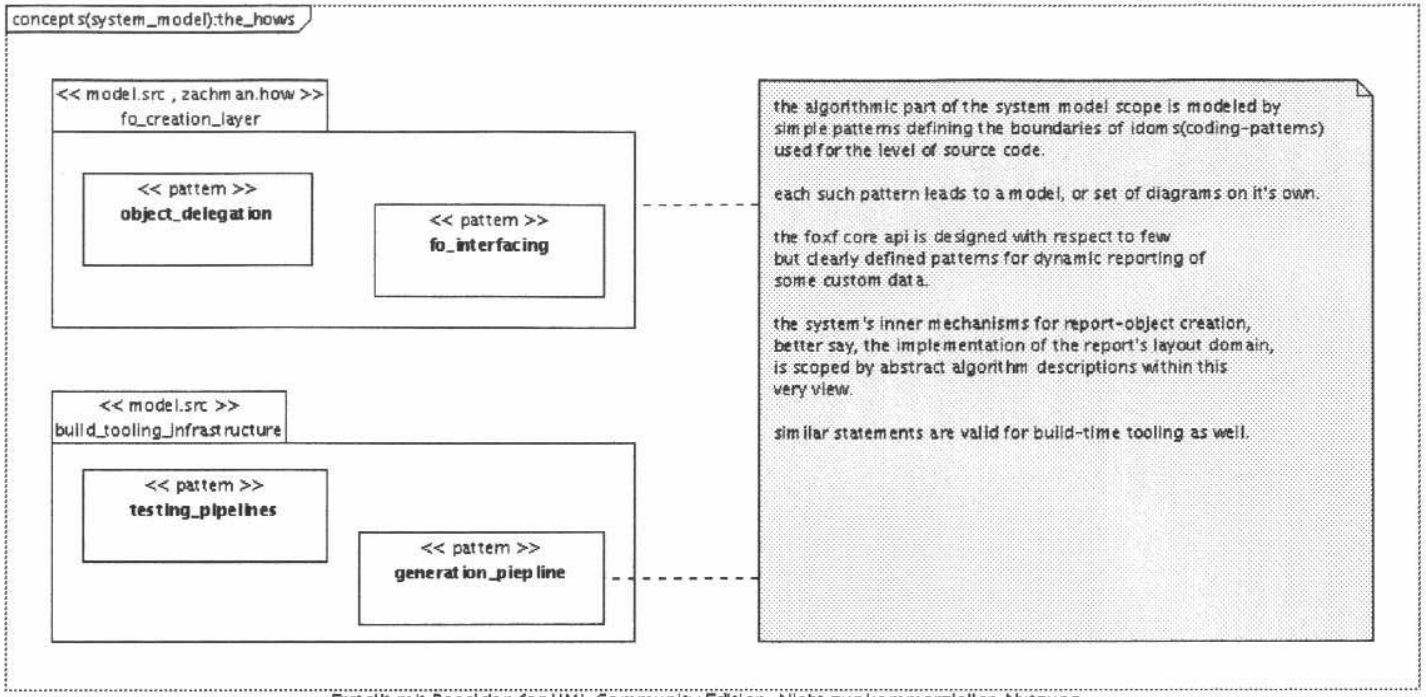


from the perspective of generator programming. with sources taken from the designer's view. model-driven generation like found in [Wleppe et.al. 2003] jumps into focus again.
it could be said, that from here on, platform specific models (abbr. psm) play a major role. the difficulty just is, the still missing understanding for the term of model-generators, meaning: a useful approach for this kind of generation is still lack of existence. at least as far as the author's state of knowledge is concerned.

the work of [Busclmann et. al. 1996] introduces the term of pattern-systems. system here, best is understood as a systematic approach of applying multiple patterns to form a bigger whole.

with respect to the ET system models, that's exactly what is required. relate applications of patterns, defined in detail on deeper views, into the bigger whole again.

for the ideal of taking pattern-formalization as a major fundamental for generation-theory, systems like that one, will be needed, to help solving brain-teasers like the integration & assembly of patterns into new one's.



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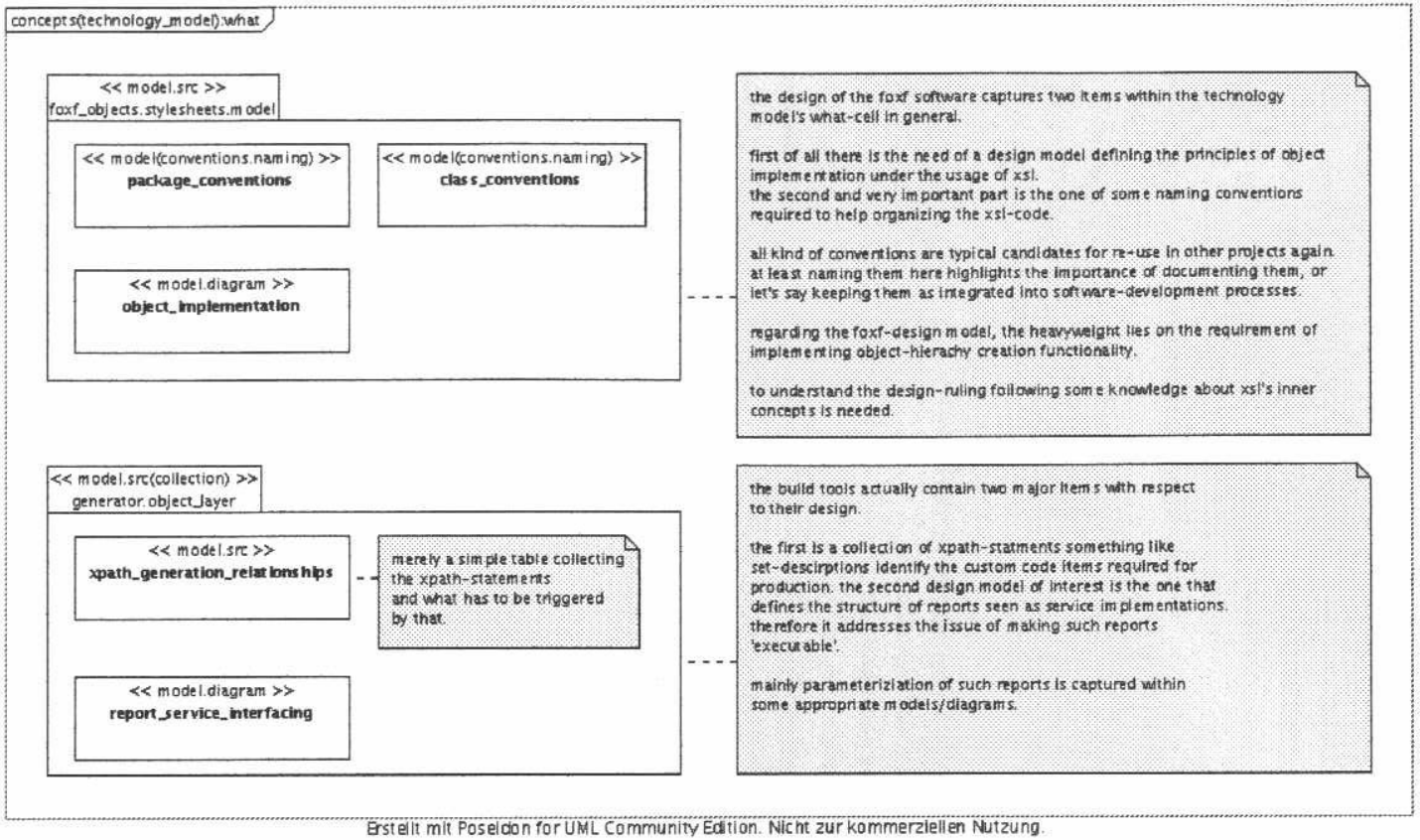
the distinction between all the different scopes defined within the ZF's cells is an issue that could raise never ending discussions. to avoid confusion, system designs are understood as that part of software development that bridge the gap from problem to solution space.

within here first decisions, influencing the software's inner design are located. remember the comments made on the system-model package earlier.

the application of pattern systems simplify the systematic necessary to use models out of this row in general, the how-cell in particular.
for a meta-level model like this exemplification of a ZF-model, classifications, building up such systems, are a means to help organizing the system level across projects. for projects themselves the all important hint for real-life is, try building systems by relating single fine-grained patterns by documents and models under the view of row 3. but don't confuse 'meta-level models' by meta-models.



that very model, regardless of the column contains all kinds of artefacts capturing the boundaries of the framework design.
as the resulting code still is one stage ahead, graphical representations most probably are those being defined on this view.

remark:
to get a detailed overview of languages useful for the different cells have a detailed look into [Hay 2002]

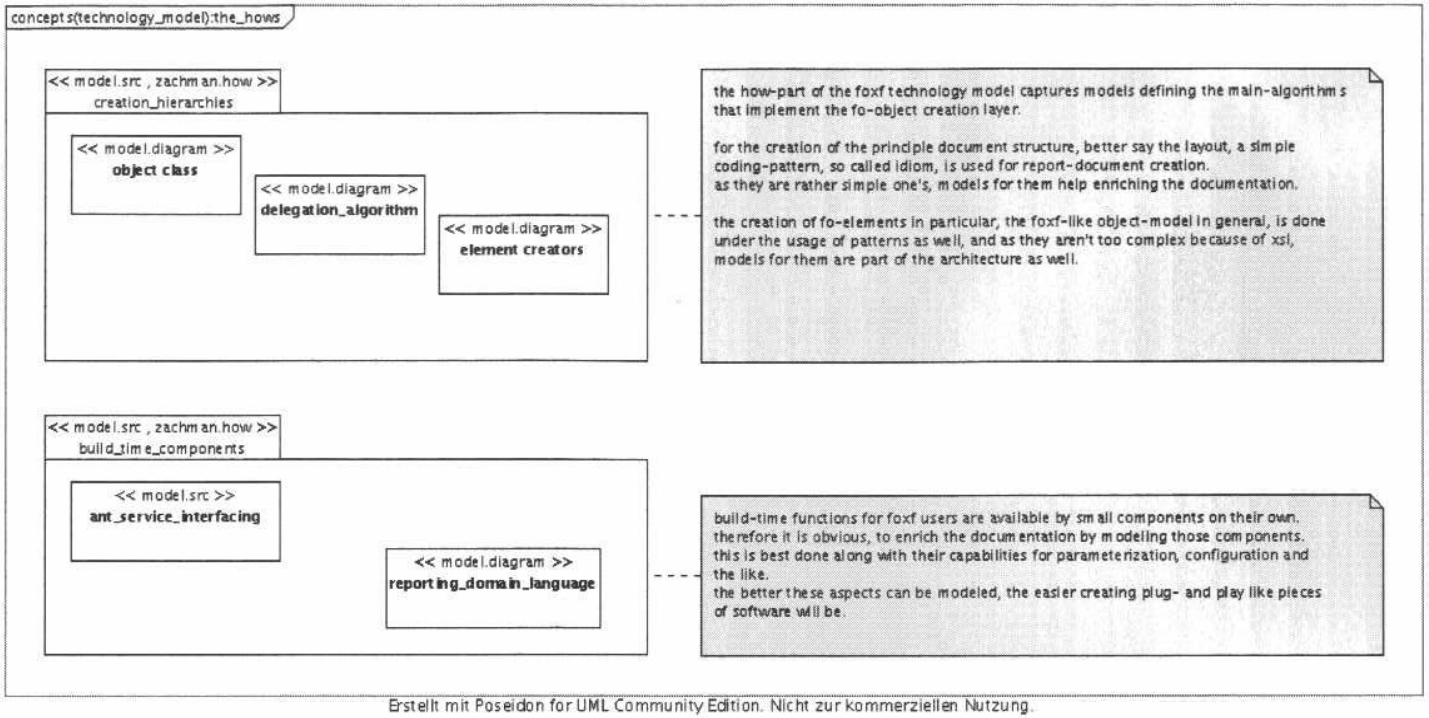
the techn.-model deals with the inner design of software within the boundaries defined by the sys.-model. for the column of what the UML-Profile for ZF captures design-models and -conventions.

diagrams declared on this layer are the one's with the highest importance for 'real' code generation, besides the designs themselves, modeling-, naming-, documentation- or whatever kind of conventions have an aspect-like influence to the code itself.

tools for coding conventions e.g. exist already, and usually are easy to integrate into build tools like ant, or IDE's like eclipse. depending on their flexibility former formalization of such ruling is a subject of discussion on it's own again.

one remark on Stereotypes:
why not extending them by principles close to predicate logic.
still an idea in mind.

the use of stereotypes, be it systems of stereotypes, aka. UML-Profiles, raises another problem. as the particular profiles used for application modeling depend on the configuration established in a IT-model, such model-files have to be pre-generated and/or updated. Solving that very problem moves the focus for a while. first of all, it is worth mentioning, that a problem like this is a very common one within the topic of generation anyway.
At this point in time a short sideview to [Kerrington 2003] shall help getting a bit of light into darkness. Kerrington himself knows SEX kinds of generators, that are something like well-known patterns for code-generators. He talks about code-mungers, inline-code-expanders, mixed-code-generators, that all take 'real' source-code for input. furthermore he knows about partial-class, full-tier and domain-generators. to get an idea of their different properties check out his work. Although his work is a very useful one, he makes one big mistake. for him, model-generators are an example of full-tier-gen. The work-out of the differences would be enough for another document like this. But to provide a hint, think about the role of UML-profiles. Besides all that the history of soft has shown how to get to dom.-gen. by time.



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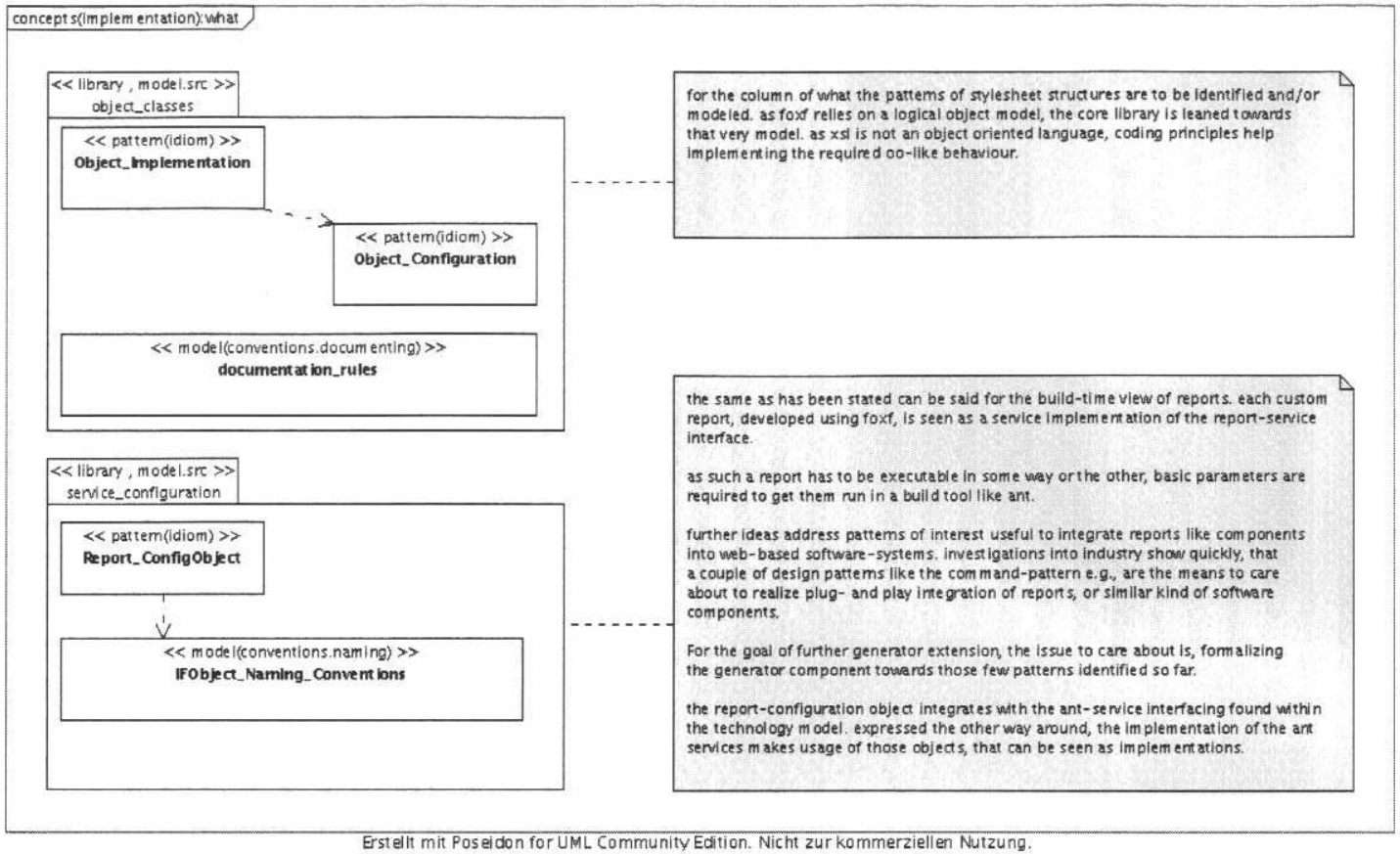
the big question:
how to generalize algorithms, be it say functionality.
still another brain-teaser, but defining the main patterns applied, should be a starting point.

the inner design of functional aspects of a software in general may be the most critical aspect for the finite goal of smart code generation. graphical languages could be useful to create particular types of algorithms. UML-like behavioral diagram types are one example for those kind of languages, again with respect to the mentioned work by David Hay. althought their use is very restricted.
the most promising approach to close some gaps seems to be the Action Semantics Language part of the Executable-UML [Mellor Balcer 2002]. just discussing that particular stuff in detail raises side-views to principles like [GenVoca].
still a brainteaser.

some thoughts on Executable UML:
the Action-Semantics are really worth studying, but what is an executable model good for?! the customer wants a running software and nothing else.

this very cell highlights the difficulty of overall code-generation. the requirements with respect to algorithms. the only succesful way here may be the formalization of design-patterns and their implementations within components used.
diagrams like all behavioral types only can be a first stage for functional aspects of a design or implementation. at least it is more than obvious, that formal approaches for structural aspects help minimizing required handcraft for the functional one's.
of course Jackson is worth mentioning again. graphical languages can be useful within the scope of particular problems, but for sure not every problem around.
to get another idea why pure graphical, let's call it visual-programming, will never come true, look into [Schiffer 1997]

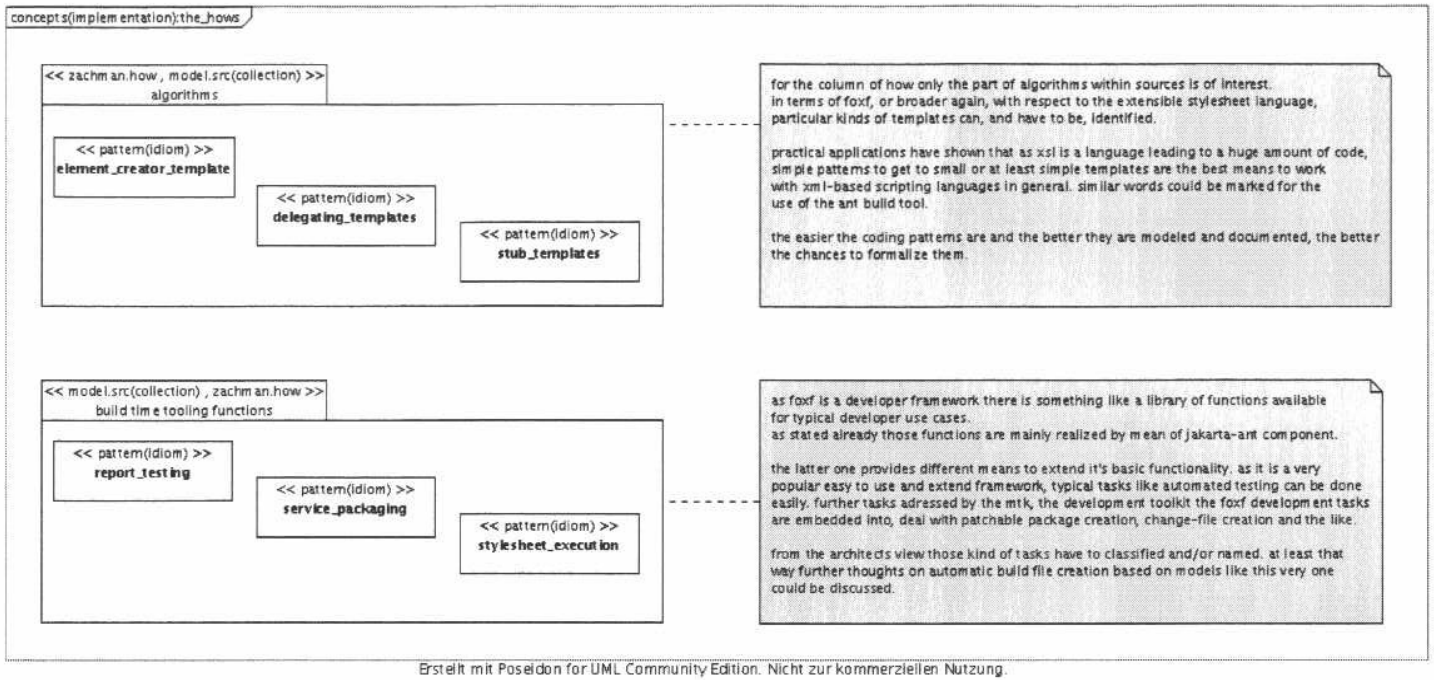


coding- and documenting conventions are simple means, that help organizing the chaos. from the software architect's point of view, means, the person organizing the structure of artefacts to be collected within projects, needs simple means defined, the programmer uses when doing his work.

beyond all kind of conventions so called idioms, patterns for source-code with respect to concrete programming languages(e.g. C, xsl, ...), are a popular and effective means to further formalize the process of software production.

to get a better idea about idioms have a look into [Buschmann et. al. 1996] for the architect as well as the programmer identifying those idioms and relating them into a simple model, will simplify knowledge-reuse in future projects.

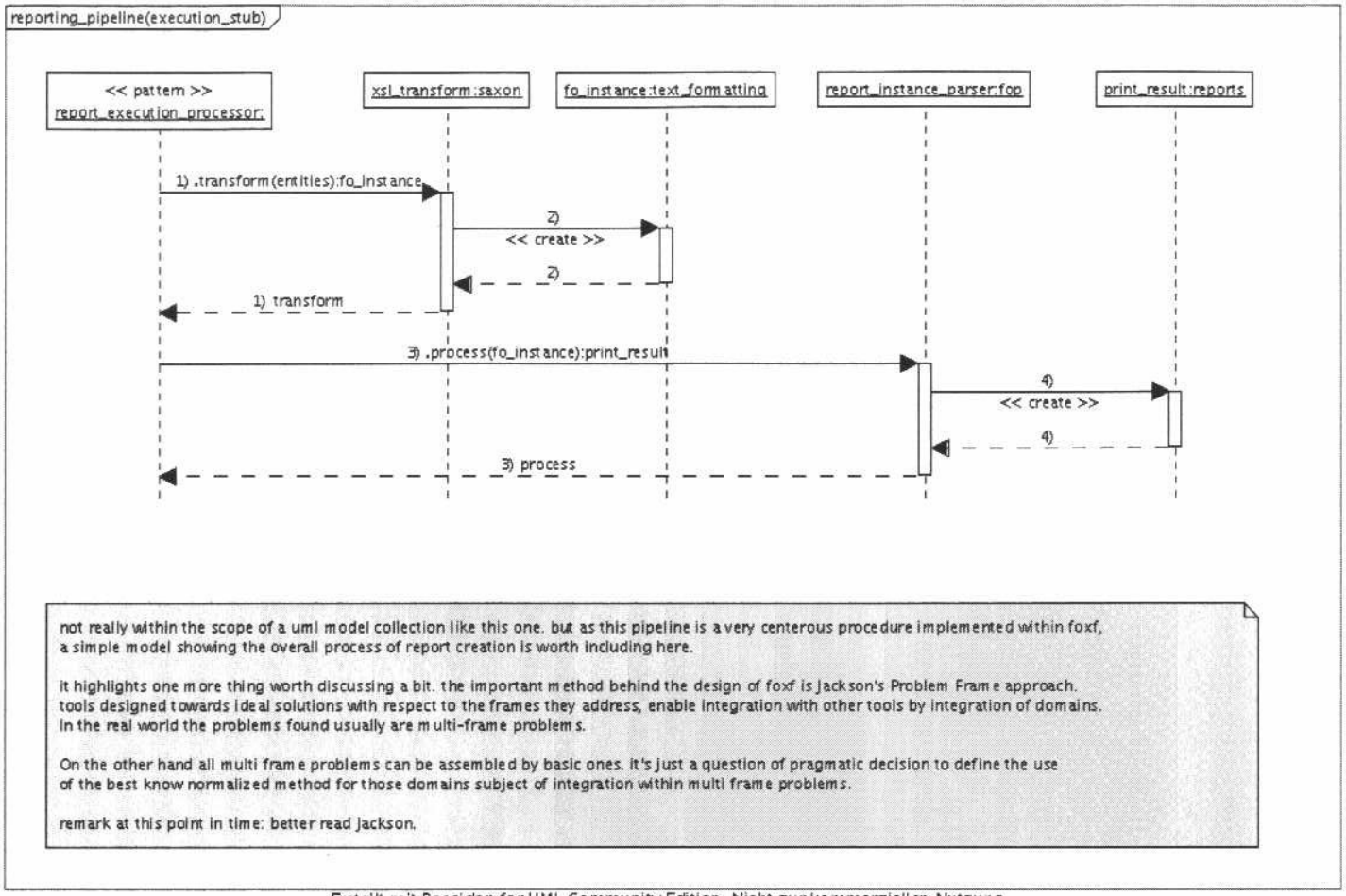
idioms are those kind of patterns found on the lowest level in terms of XT-rows, as they deal with the structure of code.
their formalization could turn out to be the easiest one, as the underlying language used, already relies on some kind of formalism. from there on, as idioms scope functionality as well, further thoughts on the integration of Action Semantics could be worth writing down on their own.



for the implementation of functional aspects, similar languages as for the what items are subject of usage. although usually only 'real' programming languages should be expected here.

the what cell, implementing the things of interest, classes e.g. data-describing languages are within the scope additionally. in general it can be stated, that both columns can be found within one piece of code at the same time. ZF therefore further helps distincting between the generation of structural and functional aspects of source code.

most probably. formalization of Idiom-usage will be one of the major secrets behind automated software production. the better writing them down. the better and easier the design of an overall generation-toolkit, or let's say framework, for another time.



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one more secret to plug-and-play like software construction: smart integration of problem-domains that serve as integrators within multi-frame problems.

the inclusion of this model does nothing but demonstrating the importance of Jackson another time. reporting problems e.g. embed into two more PF's as found within software systems. in the real world, the process of report-creation is preceded by some kind of data-queries or data-mining and the like. single transformations like those two are integrated into some pipeline, like the one above. the latter one, a problem frame on it's own again.

Summary

as shown, generation-theory is a rather complex subject and hard to get. most probably it's not even established, as available approaches somehow related are uncountable and usually pretty different. to say it different, putting them into a work like that one, is impossible by now. Under the guideline of the Zachman-Framework for SW-Architecture a mere rough overview could be given. Using his ideas means transforming between cells. for sure that is the major reason, to take it as a base for the collection of some ideas. because of it's young age, ideas on generative programming are far away from being complete. works like the Jackson one's help developers anywhere. for generators there is one question be kept in mind. if, and there are quite some reasons to imagine the fact, the amount of software problems is an endful one, overall code-generation, may be possible.

On the other hand the Zachman Framework has 30 cells, so there is quite some work ahead.

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better read Jackson.
if done so,
read it again.
until you think you
understood him.
start all over then.