Formal Foundations of Ontologies and Reasoning



Ivan Varzinczak

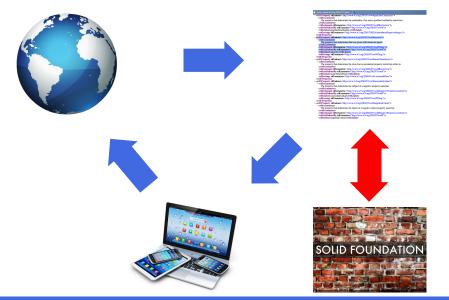
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Why are we here?



Ivan Varzinczak

Why are we here?



Ivan Varzin<u>czak</u>

Main parts

- 1. Introduction to ontologies and description logics
- 2. The description logic \mathcal{ALC}
- 3. Introduction to modelling and reasoning with \mathcal{ALC}
- 4. Reasoning with ontologies
- 5. More and less expressive DLs
- 6. Formal ontologies in OWL and Protégé

Main parts

- 1. Introduction to ontologies and description logics
- 2. The description logic \mathcal{ALC}
- 3. Introduction to modelling and reasoning with \mathcal{ALC}
- 4. Reasoning with ontologies
- 5. More and less expressive DLs
- 6. Formal ontologies in OWL and Protégé
- There will be
- Examples
- Exercises
- A lot of interaction (I hope)

Bibliography

- F. Baader, D. Calvanese, D. McGuinness, D. Nardi, and P. Patel-Schneider (eds.): The Description Logic Handbook: Theory, Implementation and Applications. Cambridge University Press, 2nd edition, 2007.
- F. Baader, I. Horrocks, C. Lutz, and U. Sattler. An Introduction to Description Logic. Cambridge University Press, 2017.
- M. Krötzsch, F. Simančík, and I. Horrocks. Description Logic Primer. http://arxiv.org/pdf/1201.4089v3.pdf
- The Protégé Ontology Editor. http://protege.stanford.edu
- The Description Logic workshop series. http://dl.kr.org

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- F. Baader, D. Calvanese, D. McGuinness, D. Nardi, and P. Patel-Schneider (eds.): The Description Logic Handbook: Theory, Implementation and Applications. Cambridge University Press, 2nd edition, 2007.
- F. Baader, I. Horrocks, C. Lutz, and U. Sattler. An Introduction to Description Logic. Cambridge University Press, 2017.
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Course website

https://tinyurl.com/Graz2019DL

Outline of Part 1

Formal Ontologies

Introduction to DLs

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Introduction to DLs

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Explicit specification of a shared conceptualisation

Example (The student ontology)

- Employed students are students and employees
- Students are not taxpayers (do not pay taxes)
- Employed students are taxpayers (pay taxes)
- Employed students who are parents are not taxpayers (do not pay taxes)
- To work for is to be employed by
- John is an employed student, John works for IBM

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classes relations individuals

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- To work for is to be employed by
- John is an employed student, John and IBM are in works for

classes relations individuals specialisation and instantiation

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A common vocabulary and a shared understanding

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Classes or concepts

- Describe concrete or abstract entities within the domain of interest
- E.g.: Employed student, Parent

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Instances of classes and relations

- Name objects of the domain and denote representatives of a concept
- E.g.: John, John is an employed student, John works for IBM

Why Description Logics?

Expressivity

- Concepts ✓
- Relations \checkmark
- Instances \checkmark

DLs have all one needs to formalise ontologies!

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DLs have all one needs to formalise ontologies!

Computational properties

- Amenability to implementation \checkmark
- Decidability √
- Good trade-off between expressivity and complexity \checkmark

Most DL-based systems satisfy all of these!

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Outline of Part 1

Formal Ontologies

Introduction to DLs

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First of all, what are DLs?

Decidability

- Some logics can be made decidable by sacrificing expressive power
- DLs are less expressive than full first-order logic
- DLs are decidable, but what complexity is "OK"?

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Decidability

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Technically

- DLs are a family of fragments of first-order logic
- Only two variable names
- For the cognoscenti: correspond to guarded fragments of FOL
- But much, much simpler than FOL...

(Special concepts: \top , \perp)

Elements of the language (domain dependent)

Atomic concept names

- $\mathsf{C} =_{\mathrm{def}} \{A_1, \ldots, A_n\}$
 - Intuition: basic classes of a domain of interest
- Student, Employee, Parent

(Special concepts: \top , \perp)

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Atomic role names

- $\mathsf{R} =_{\operatorname{def}} \{r_1, \ldots, r_m\}$
- Intuition: basic relations between concepts
- worksFor, empBy

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Atomic role names

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- Intuition: basic relations between concepts
- worksFor, empBy

Individual names

- $\mathsf{I} =_{\mathrm{def}} \{a_1, \ldots, a_l\}$
- Intuition: names of objects in the domain
- john, mary, ibm

Elements of the language (domain independent)

Boolean constructors

- Concept negation:
- Concept conjunction:
- Concept disjunction:

- (class complement)
- (class intersection)
- (class union)

Elements of the language (domain independent)

—

Boolean constructors

- Concept negation:
- Concept conjunction:
- Concept disjunction:

Role restrictions

- Existential restriction:
- Value restriction:

(class complement) (class intersection)

(class union)

- (at least one relationship)
- (all relationships)

Elements of the language (domain independent)

 \forall

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(class complement)

(class intersection)

(all relationships)

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Further constructors: cardinality constraints, inverse roles, ... (if needed)

Building concepts

Definition (Complex concepts)

- \top and \perp are concepts
- Every concept name $A \in \mathsf{C}$ is a concept
- If C and D are concepts and $r \in \mathsf{R}$, then

 $\neg C \quad (\text{complement of } C)$

- $C \sqcap D$ (intersection of C and D)
- $C \sqcup D$ (union of C and D)

are all concepts

Nothing else is a concept (at least for now)

 $\exists r.C \quad (\text{existential restriction}) \\ \forall r.C \quad (\text{value restriction})$

- T 🗆 ⊥ 🛛 T
- $C \sqcup \forall r. \sqcap \neg D$
- $C \sqcup \neg \neg \exists D$
- ∃r.⊤
- $\exists r. \forall s. C \sqcap D$
- $\forall r.C \sqcap \neg D$
- $\forall r.(C \sqcap \neg D)$
- $\forall \exists r.C$

- T⊓⊥⊔T √
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- T⊓⊥⊔T √
- $C \sqcup \forall r. \sqcap \neg D \times$
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- T⊓⊥⊔T √
- $C \sqcup \forall r. \sqcap \neg D \times$
- $C \sqcup \neg \neg \exists D \times$
- $\exists r. \top \checkmark$
- $\exists r. \forall s. C \sqcap D$
- $\forall r.C \sqcap \neg D$
- $\forall r.(C \sqcap \neg D)$
- $\forall \exists r.C$

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Exercise

Which ones are concepts and which aren't?

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- $\forall r.(C \sqcap \neg D) \checkmark$
- $\forall \exists r.C \times$

Full negation

- Negation of arbitrary concepts
- Intuition: the complement of a concept
- E.g.: $\neg\neg$ Student \neg (Student \sqcap Parent)

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Atomic negation

- Some DLs only allow negation of concept names
- Good complexity results
- E.g.: ¬Student ¬Parent

Concept conjunction

- Intuition: the intersection of two concepts
- E.g.: Student □ Parent

Concept conjunction

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Concept disjunction

- Intuition: the union of two concepts
- E.g.: Employee ⊔ Student

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- Intuition: the union of two concepts
- E.g.: Employee ⊔ Student

So far we have seen the Boolean fragment of our concept language

• At least as expressive as classical propositional logic

Existential restriction

- Intuition: there is some link with a concept
- E.g.: ∃pays.Tax

Existential restriction

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- E.g.: ∃pays.Tax
- Value restriction
- Intuition: all links with a concept
- E.g.: VempBy.Company

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So far we have got ALC (Attributive Language with Complement)

Prototypical concept description language (there are others)

Different flavours

- \mathcal{ALC} : C ::= \top | \perp | C | $\neg C$ | $C \sqcap C$ | $C \sqcup C$ | $\forall r.C$ | $\exists r.C$
- \mathcal{ALCQ} : $C ::= \dots \mid \geq nr.C \mid \leq nr.C$
- EL, DL-Lite, SHIQ, SHOQ, SROIQ (basis of OWL 2), ...

Different flavours

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Example

\neg (Student \sqcap Parent)	Student □ ¬∃pays.Tax
<pre>∃empBy.Company</pre>	EmpStud □ ∃pays.Tax
Employee ⊔ Student ⊓ ∃worksFor.Parent	∀worksFor.Company

Different flavours

- \mathcal{ALC} : $C ::= \top \mid \perp \mid \mathsf{C} \mid \neg C \mid C \sqcap C \mid C \sqcup C \mid \forall r.C \mid \exists r.C$
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With \mathcal{L}_{ALC} we denote the concept language of ALC

Ivan Varzinczak

Formal Foundations of Ontologies and Reasoning (Part 1)

Definition (Interpretation)

Tuple $\mathcal{I} =_{def} \langle \Delta^{\mathcal{I}}, \cdot^{\mathcal{I}} \rangle$, where

- $\Delta^{\mathcal{I}}$ is a domain (set of objects)
- $\cdot^{\mathcal{I}}$ is an interpretation function such that

$$A^{\mathcal{I}} \subseteq \Delta^{\mathcal{I}} \qquad r^{\mathcal{I}} \subseteq \Delta^{\mathcal{I}} \times \Delta^{\mathcal{I}} \qquad a^{\mathcal{I}} \in \Delta^{\mathcal{I}}$$

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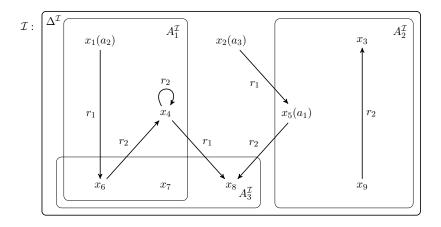
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Example

- $\mathsf{Let} \ \ \mathsf{C} = \{A_1, A_2, A_3\}, \quad \ \mathsf{R} = \{r_1, r_2\}, \quad \ \mathsf{I} = \{a_1, a_2, a_3\}. \quad \ \mathsf{Let} \ \mathcal{I} = \langle \Delta^{\mathcal{I}}, \cdot^{\mathcal{I}} \rangle \text{ where:}$
- $\Delta^{\mathcal{I}} = \{x_i \mid 1 \le i \le 9\}, \quad a_1^{\mathcal{I}} = x_5, \ a_2^{\mathcal{I}} = x_1, \ a_3^{\mathcal{I}} = x_2$
- $A_1^{\mathcal{I}} = \{x_1, x_4, x_6, x_7\}, \quad A_2^{\mathcal{I}} = \{x_3, x_5, x_9\}, \quad A_3^{\mathcal{I}} = \{x_6, x_7, x_8\}$
- $r_1^{\mathcal{I}} = \{(x_1, x_6), (x_4, x_8), (x_2, x_5)\}, \quad r_2^{\mathcal{I}} = \{(x_4, x_4), (x_6, x_4), (x_5, x_8), (x_9, x_3)\}$



$$\begin{array}{l} \top^{\mathcal{I}} =_{\operatorname{def}} \Delta^{\mathcal{I}} \quad \bot^{\mathcal{I}} =_{\operatorname{def}} \emptyset \quad (\neg C)^{\mathcal{I}} =_{\operatorname{def}} \Delta^{\mathcal{I}} \setminus C^{\mathcal{I}} \\ (C \sqcap D)^{\mathcal{I}} =_{\operatorname{def}} C^{\mathcal{I}} \cap D^{\mathcal{I}} \quad (C \sqcup D)^{\mathcal{I}} =_{\operatorname{def}} C^{\mathcal{I}} \cup D^{\mathcal{I}} \\ (\exists r.C)^{\mathcal{I}} =_{\operatorname{def}} \{x \in \Delta^{\mathcal{I}} \mid r^{\mathcal{I}}(x) \cap C^{\mathcal{I}} \neq \emptyset\} \\ (\forall r.C)^{\mathcal{I}} =_{\operatorname{def}} \{x \in \Delta^{\mathcal{I}} \mid r^{\mathcal{I}}(x) \subseteq C^{\mathcal{I}}\} \end{array}$$

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Extending DL interpretations

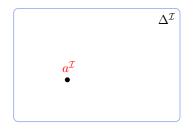
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Definition (Concept Satisfiability)

A concept C is satisfiable if there is $\mathcal{I} = \langle \Delta^{\mathcal{I}}, \cdot^{\mathcal{I}} \rangle$ s.t. $C^{\mathcal{I}} \neq \emptyset$

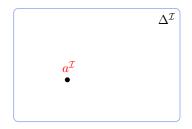
Individual names

• At most one element of $\Delta^{\mathcal{I}}$



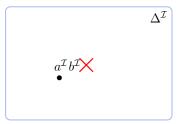
Individual names

• At most one element of $\Delta^{\mathcal{I}}$



Unique Name Assumption

• At most one name per object



The 'top' concept

- Everything is in $\top^{\mathcal{I}}$
- Also called Thing



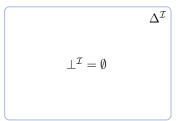
The 'top' concept

- Everything is in $\top^{\mathcal{I}}$
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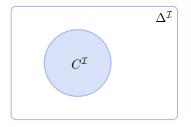
The 'bottom' concept

- $\perp^{\mathcal{I}}$ is in everything
- Also called Nothing



Arbitrary concept

- A class in the domain
- $C^{\mathcal{I}} \subseteq \Delta^{\mathcal{I}}$



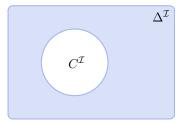
Arbitrary concept

- A class in the domain
- $C^{\mathcal{I}} \subseteq \Delta^{\mathcal{I}}$

$C^{\mathcal{I}}$

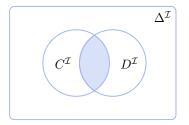
Concept negation

- The complement of a concept
- $(\neg C)^{\mathcal{I}} = \Delta^{\mathcal{I}} \setminus C^{\mathcal{I}}$



Concept conjunction

- The intersection of two classes
- $(C \sqcap D)^{\mathcal{I}} = C^{\mathcal{I}} \cap D^{\mathcal{I}}$

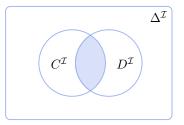


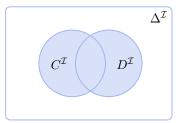
Concept conjunction

- The intersection of two classes
- $\bullet \ (C \sqcap D)^{\mathcal{I}} = C^{\mathcal{I}} \cap D^{\mathcal{I}}$

Concept disjunction

- The union of two classes
- $(C \sqcup D)^{\mathcal{I}} = C^{\mathcal{I}} \cup D^{\mathcal{I}}$

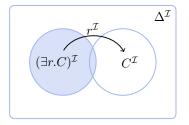




Existential restriction

• At least one value of a class

•
$$(\exists r.C)^{\mathcal{I}} = \{x \mid r^{\mathcal{I}}(x) \cap C^{\mathcal{I}} \neq \emptyset\}$$



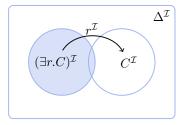
Existential restriction

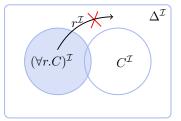
• At least one value of a class

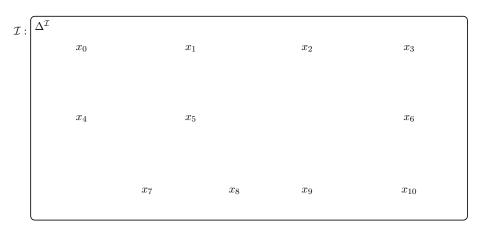
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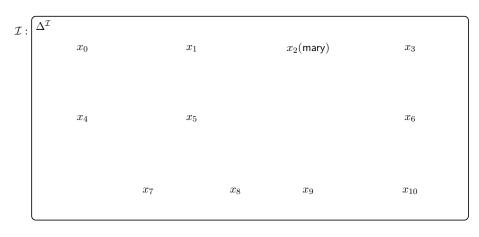
Value restriction

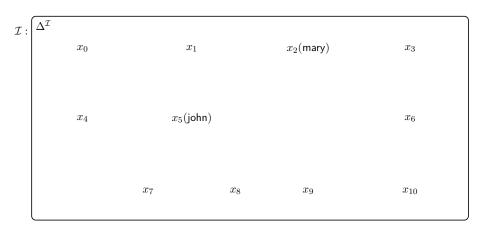
- All values of a class
- $(\forall r.C)^{\mathcal{I}} = \{x \mid r^{\mathcal{I}}(x) \subseteq C^{\mathcal{I}}\}$

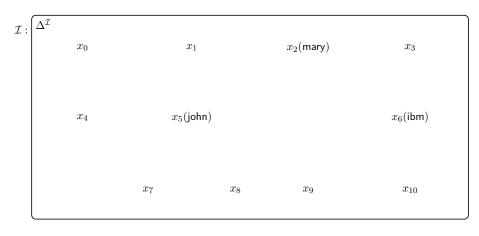


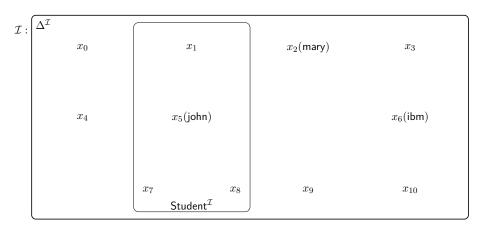


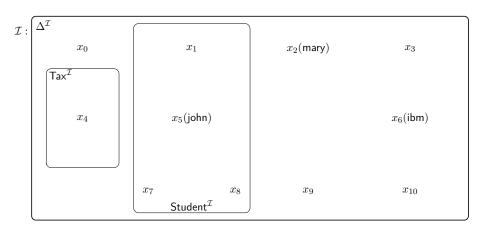


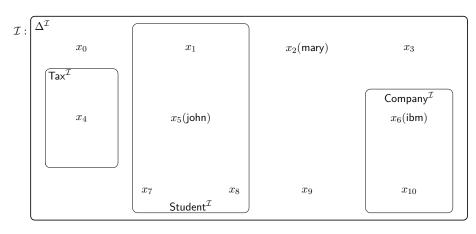


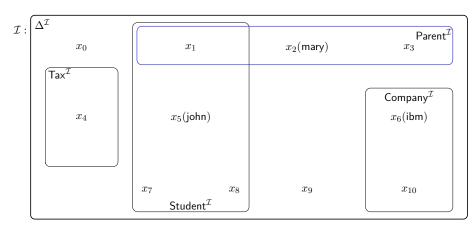


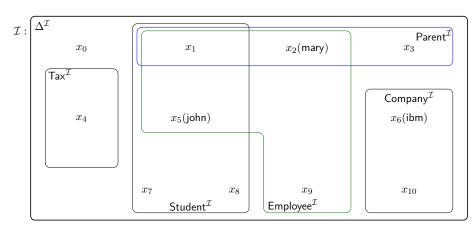


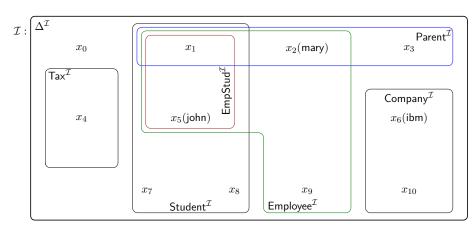


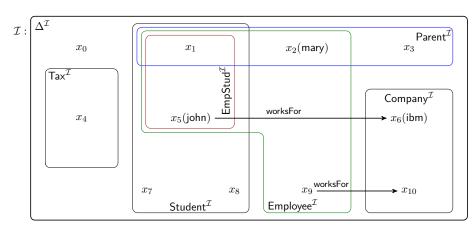


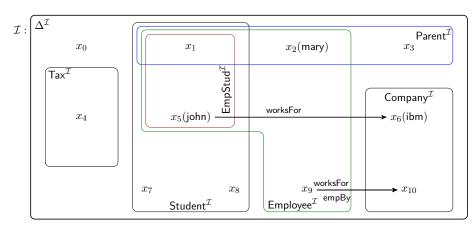


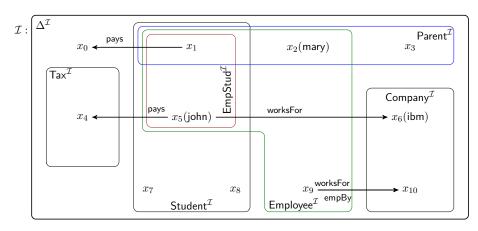




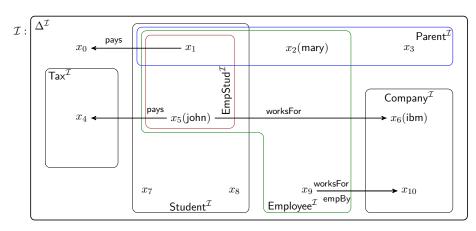








An interpretation is a complete description of the world

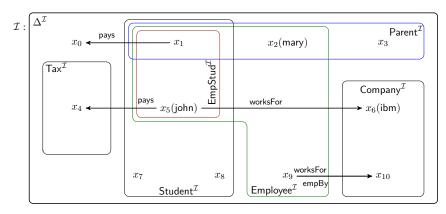


 $((\mathsf{EmpStud} \sqcup \mathsf{Parent}) \sqcap \exists \mathsf{pays}.\top)^{\mathcal{I}} = \{x_1, x_5\}$

Ivan Varzinczak

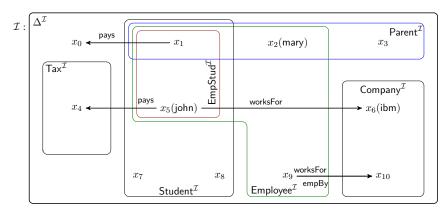
Formal Ontologies

 $\mathsf{Let}\ \mathsf{C} = \{\mathsf{Company}, \mathsf{Employee}, \mathsf{EmpStud}, \mathsf{Parent}, \mathsf{Student}, \mathsf{Tax}\}, \ \mathsf{R} = \{\mathsf{empBy}, \mathsf{pays}, \mathsf{worksFor}\}\ \mathsf{I} = \{\mathsf{ibm}, \mathsf{john}, \mathsf{mary}\}$



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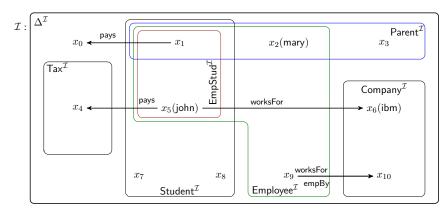


- (¬Employee)^𝒯=?
- (∃pays.⊤)^I=?
- $(\neg \text{Parent} \sqcap \text{Employee})^{\mathcal{I}} = ?$

- $(\neg EmpStud \sqcap \forall empBy.Company)^{\mathcal{I}} = ?$
- (∃worksFor.∃empBy.Parent)^I=?
- (Student $\sqcap \forall pays. \bot)^{\mathcal{I}} = ?$

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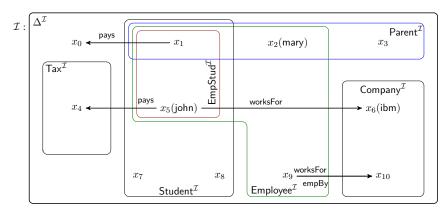


- $(\neg \mathsf{Employee})^{\mathcal{I}} = \{x_0, x_3, x_4, x_6, x_7, x_8, x_{10}\}$
- (∃pays.⊤)^{*I*} =?
- $(\neg \text{Parent} \sqcap \text{Employee})^{\mathcal{I}} = ?$

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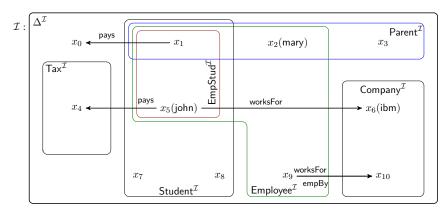


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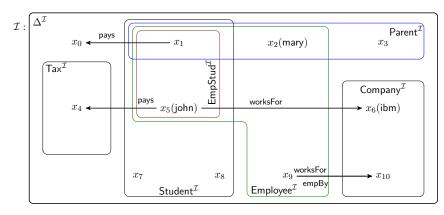


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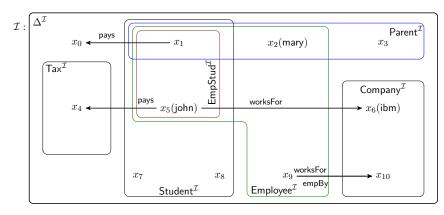
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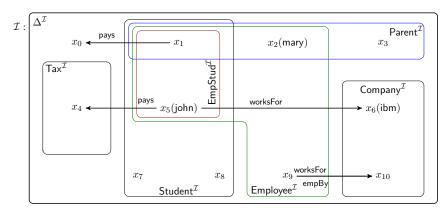
• $(\exists worksFor. \exists empBy. Parent)^{\mathcal{I}} = \emptyset$

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(∃worksFor.∃empBy.Parent)^I = ∅

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Formal Foundations of Ontologies and Reasoning (Part 1)

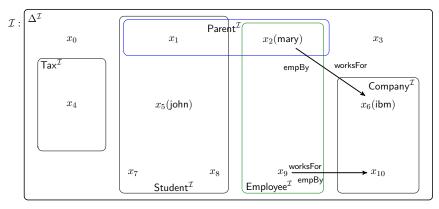
26 April 2019 29

Let C = {Company, Employee, EmpStud, Parent, Student, Tax}, R = {empBy, pays, worksFor} I = {ibm, john, mary} Find an interpretation $\mathcal{I} = \langle \Delta^{\mathcal{I}}, \cdot^{\mathcal{I}} \rangle$ such that:

- $(Student \sqcap Employee)^{\mathcal{I}} = \emptyset$, $Parent^{\mathcal{I}} \subseteq (Student \sqcup Employee)^{\mathcal{I}}$, $(\neg EmpStud)^{\mathcal{I}} = \Delta^{\mathcal{I}}$
- Student^{\mathcal{I}} \subseteq (\forall pays. \perp)^{\mathcal{I}}, (\exists worksFor. \top)^{\mathcal{I}} \subseteq (\neg (Student \sqcup Tax \sqcup Company))^{\mathcal{I}}, Employee^{\mathcal{I}} \subseteq (\exists empBy. \top)^{\mathcal{I}}

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Some Properties

Lemma

For every interpretation $\mathcal{I} = \langle \Delta^{\mathcal{I}}, \cdot^{\mathcal{I}} \rangle$, and for every $C, D \in \mathcal{L}_{ALC}$

- $(\neg \neg C)^{\mathcal{I}} = C^{\mathcal{I}}$
- $(\neg (C \sqcap D))^{\mathcal{I}} = (\neg C \sqcup \neg D)^{\mathcal{I}}$
- $(\neg (C \sqcup D))^{\mathcal{I}} = (\neg C \sqcap \neg D)^{\mathcal{I}}$
- $(\neg \forall r.C)^{\mathcal{I}} = (\exists r.\neg C)^{\mathcal{I}}$
- $(\neg \exists r.C)^{\mathcal{I}} = (\forall r.\neg C)^{\mathcal{I}}$

\mathcal{ALC} is the smallest propositionally closed DL

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\mathcal{ALC} is the smallest propositionally closed DL

Theorem

 $\mathcal{ALC} \text{ has the finite model property: if } C \text{ is satisfiable, then there is } \mathcal{I} = \langle \Delta^{\mathcal{I}}, \cdot^{\mathcal{I}} \rangle \text{ such that } C^{\mathcal{I}} \neq \emptyset \text{ and } \Delta^{\mathcal{I}} \text{ is finite}$

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Epilogue

Summary

- What we mean by ontology
- Formal ontologies and their main ingredients
- Basic description logics
- The concept language and its semantics
- How DLs relate to other formalisms

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What next?

- A fundamental notion in DLs
- Formalising ontologies with DLs

