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SUPPORTING COLLABORATIVE WRITING OF XML DOCUMENTS

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Abstract: Data management is a key issue in cooperative systems. Anyone who uses more than one computer or collaborates with other people is aware of the problems posed by having multiple copies of shared documents. Most existing synchronization tools are specific to a particular type of shared data i.e. text files, calendars, XML files. Therefore, user should use several tools to maintain their different copies up-to-date. This is not an easy task. To address this issue, we defined a generic synchronization framework based on the operational transformation approach. This framework allows to synchronize text files, calendars, XML files by using the same tool. The main objective of this paper is to present this framework and how it is used to support cooperative writing of XML document. An implementation is illustrated through the revision control system called So6, which is a part of a distributed collaborative technology called LibreSource.

1 INTRODUCTION

Cooperative writing is becoming increasingly common; often compulsory in academic and corporate work. Even the World Wide Web or simply the Web becomes a global read-write information space where multiple authors are interacting, in contrast of the traditional model of one author publishing to many readers. People involved in cooperative writing can work across space, time and organizational boundaries with links strengthened by webs of communication technologies. In spite of this need for collaboration, it is surprising to see how poorly computer systems support group activities. Very often, people just send the shared document by mail and use a turn taking strategy to avoid conflicting updates. This is a serious bottleneck for productive work since people cannot work in parallel. A good cooperative editor should allow anyone to write any shared data at any time without lost updates. The existing tools such as CVS (Berliner, 1990) avoid lost updates. However, CVS was originally designed to support cooperative software development. It considers only text files containing code sources such as C files, JAVA files for merging. In this context, when conflicting changes are performed, conflicts appear inside merged files. A special syntax is used to clearly help the programmers to locate the problem. Thus, CVS allows anyone to write any text files at any time without lost updates.

We want to build a cooperative editor that allows anyone to write any kind of data, not only text files, but also XML files, CAD files, calendar files at any time without lost updates. A generic synchronizer

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1Any user providing that he has the right permissions to do so.
that enables to merge any data type without lost update is required. We propose to build a generic and a safe synchronisation framework. This framework allows to synchronise text files, calendars, XML files by using the same tool while ensuring that conflict resolution will not introduce lost updates.

In previous work, we described how we use the operational transformation approach (OT) as a theoretical foundation to build such a generic and safe synchronizer (Molli et al., 2003). We defined also the specific transformation functions to synchronise linear structure such as text files.

This paper will focus on the transformation functions for XML data and their implementation in an open source collaborative technology called LibreSource. Our final objective is to build a library for blocks of text, strings, trees, graphs. Anyone can use these functions, add new functions or modify exiting ones according to their needs. The paper is structured as follows. The next section will introduce the operational transformation approach which serves as a theoretical foundation for our generic synchronisation framework called So6. The section 3 will present the architecture and the algorithms used in So6. The Section 4 will define the XML transformation functions and will demonstrate the use of these functions through an example. The section 5 will discuss related work. The last section will conclude and point some future work.

2 BACKGROUND

This section describes the Operational transformation approach (OT) that is the theoretical foundation of the generic and safe synchroniser So6. OT (Ellis and Gibbs, 1989) is an optimistic replication model used in real-time group editors domain. OT considers n sites, each site owns a copy of shared data. When a site performs an update, it generates a corresponding operation, which is first executed locally then broadcasted to other sites. Every operation is processed in four steps: (a) generated on one site, (b) broadcasted to other sites, (c) received by other sites, (d) executed on other sites.

The execution context of a received operation op1 may be different from its generation context. In this case, the integration of op1 by other sites may lead to inconsistencies between replicas.

For instance, we consider two sites site1 and site2 working on a shared data of type string of characters initially equal to the string effect. We consider that a string of characters can be modified with the operation ins(p,c) for inserting a character c at position p in the string. We assume the position of the first character in a string is 0. user1 and user2 generate and execute two concurrent operations respectively op1 = ins(2,f) and op2 = ins(5,s). When op1 is received and executed on site2, it produces the expected string "effects". But, when op2 is received on site1, since it does not take into account that op1 has been executed before it, its execution leads to the state "effect". Finally, the copies of site1 and site2 do not converge.

In the operational transformation (OT) approach, before being executed, received operations are transformed regarding concurrent operations that were already executed on the local copy. This transformation is performed by calling transformation functions.

Definition A transformation function T takes two concurrent operations. These two operations namely op1 and op2, must be defined on a same state S. The function computes a new operation op′ 1 equivalent to op1 – i.e. has the same effects – but defined on the state S′ = S ⊕ op2. S′ is the state resulting from the execution of op2 on state S.

Using OT approach, our previous example is now executed as follows. When op2 is received on site1, op2 needs to be transformed regarding op1. The integration algorithm calls the transformation function T(op2 = ins(5,s),op1 = ins(2,f)) = ins(6,s) = op′ 2. The insertion position of op2 is incremented since op1 has inserted an f before s in state effect. After the execution of op′ 2, the state of site1 becomes effects. On the contrary, when op1 is received on site2, the transformation does not modify op1’s parameters since f is inserted before s. Thus, op1 is executed as-is and the state of site2 is effects. On our scenario, OT approach has ensured that both copies converge to the same value.

The OT approach distinguishes two main components. An integration algorithm. This algorithm is in charge of reception, diffusion and execution of operations. When necessary, it calls transformation functions. This algorithm does not depend on type of replicated data. A set of transformation functions. These functions can merge concurrent modifications in serializing two concurrent operations. These functions are specific to a particular type of replicated data such as string of characters, XML documents, calendars or file system.

The main criterion in OT approach is Convergence.

Convergence As every optimistic replication algorithms, OT approach tries to ensure eventual consistency i.e. when no updates occurs for a long period
of time, eventually all updates will propagate through
the system and all the copies will converge towards a
same value. In other words, when the system is idle
(no operations in pipes), all copies are identical.
To ensure this criterion, it has been proved (Suleiman et al., 1998) that the under-
lying transformation functions must satisfy two properties:

**Definition** The $TP_1$ property defines a state equi-
v alence. The state generated by the execution of $op_1$
followed by $T(op_2, op_1)$ must be the same as the
state generated by the execution of $op_2$ followed by
$T(op_1, op_2)$: $op_1 \circ T(op_2, op_1) \equiv op_2 \circ T(op_1, op_2)$

**Definition** The $TP_2$ property ensures that the trans-
formation of an operation regarding a sequence of
concurrent operations does not depend on the order in
which operations of this sequence were transformed:
$T(op_3, op_1 \circ T(op_2, op_1)) = T(op_3, op_2 \circ T(op_1, op_2))$

Therefore, the operational transformation ap-
proach could be used to design a reconciliation frame-
work able to reconcile divergent copies of any type
of data. In order to build such a framework, the fol-
lowing task have to be completed. First, an integration
algorithm must be chosen; regarding this algorithm,
$TP_2$ property may be required on underlying trans-
formation functions. Second, operations which could
be performed on shared data types must be defined.
Finally, the required transformation functions for all
combination of operations have to be provided. In
the next sections, we are going to describe our frame-
work.

### 3 THE SO6 FRAMEWORK

So6 framework is based on SOCT4 integration al-
gorithm (Vidot et al., 2000). Originally, SOCT4 has
been designed for real-time group editors, we adapted
it for asynchronous interaction (Molli et al., 2003).
SOCT4 integration algorithm requires only $TP_1$
property on transformation functions. It is based on a con-
 tinuous global order of operations. Shared data are
replicated on different sites (workspaces). Each op-
eration generated in a local site is sent with a unique
global timestamp to other sites. An operation from
a site with a given timestamp can be sent to other
sites only if all its preceding operations based on the
timestamp order have been received and executed. By
this way, SOCT4 ensures that concurrent operations
will not be transformed following different transform-
ation paths. This leverages the need for transfor-
mation functions to satisfy $TP_2$ property. Moreover,
this mechanism looks like the **Copy-Modify-Merge**
paradigm which is widely used in version control
management systems such as CVS. Regarding this
paradigm, a user can publish her modifications only if
she had read all previously published modifications.

The So6 framework has two main components: a
central timestamper also called So6 queues, and So6
workspaces which are connected to a timestamper.

#### 3.1 So6 Queue

A So6 queue $Q$ is a timestamper that stores a sequence
of operations. An operation is timed when a user
sends it to the queue. A queue maintains a times-
tamp $lastTicket$ equals to the last delivered times-
tamp. When a user creates a queue, the timestamp
$lastTicket$ is initialized to zero and the sequence of
operations is empty.

The **publish** procedure assigns a new timestamp
to the operation $op$ and stores it in $Q$.

```java
int publish(Operation op) {
    lastTicket ++
    Q[lastTicket] = op
    return lastTicket
}
```

#### 3.2 So6 Workspace

Each user owns a So6 workspace in which a user can
work insulated. The workspace stores all the docu-
ments shared by the user. This workspace is gener-
ally connected to a So6 queue. When a user modifies
a document, she generates corresponding operations.

Workspace has the following data structure:

**A timestamp** $siteTicket$. It memorises the times-
tamp of the last operation published to or retrieved
from the So6 queue.

**Two states** current$State$ and reference$State$. They
are used to compute the sequence of operations
that have been made locally. current$State$ is the
state on which the user works. reference$State$ is
the state resulting from the execution of all the
operations integrated by the site.

**A sequence of operations** $H_g$. It stores all the oper-
ations integrated by the site. This sequence con-
tains all operations published by the site, and
those retrieved from the timestamper. The opera-
tions are ordered according to their timestamps. If
the sequence of the operations $H_g$ are executed on
an empty state, then it always computes the state
reference$State$. 
Inside a workspace, the following procedures are defined:

**A Commit procedure.** During this procedure, the system detects local operations generated since last commit. Then, it sends each operation to the So6 queue in order to be timed and stored.

```
commit() {
  if (timestamper.lastTicket > siteTicket) then
    abort “uptodate_check_failed”
  Operation[] locals =
    computeDifference( referenceState, currentState )
  for (int i = 0; i < locals.length; i++) {
    int ticket = timestamper.publish(locals[i])
    execute(locals[i], referenceState)
    Hg[ticket] = locals[i]
  }
  siteTicket = timestamper.lastTicket
}
```

**An Update procedure.** Through this procedure, the system retrieves unconsumed operations from the So6 queue and merge them with local operations corresponding to unpublished changes.

```
update() {
  Operation[] remotes
  int i = 0
  while (siteTicket < timestamper.lastTicket) {
    siteTicket++
    i++
    remotes[i] = timestamper.retrieve(siteTicket)
  }
  Operation[] locals =
    computeDifference( referenceState, currentState )
  merge(remotes, locals)
}
```

The update procedure calls two other sub-procedures computeDifference and merge. The first one uses a differentiation algorithm to compute the sequence of operations that have been executed on the state state1 to obtain the state state2. For instance, in the case of an XML document, any XML differentiation algorithm can be used. For our prototype, we used XyDiff (Cobena et al., 2002). The merge procedure integrates two sequences of concurrent operations using the set of T transformation functions.

```
merge(Operation[] remotes, Operation[] locals) {
  for (int i = 0; i < remotes.length; i++) {
    Operation opr = remotes[i]
    int ticket = remotes[i].ticket
    for (int j = 0; j < locals.length; j++) {
      Operation opl = locals[j]
      locals[j] = T(opl, opr)
      opr = T(opr, opl)
    }
    execute(remotes[i], referenceState)
    Hg[ticket] = remotes[i]
    execute(opr, currentState)
    siteTicket = ticket
  }
}
```

This procedure relies on the SOCT4 integration mechanism. Each remote[i] operation must be transformed to an operation opr regarding the whole sequence of local operations. Then, this operation can be executed on the current state currentState of the site. The original operation remote[i] is executed on the state referenceState.

### 4 XML DOCUMENTS SUPPORT

In the previous section, we presented our generic framework for reconciling divergent copies of data. In this section, we describe how this framework could be instantiated to support collaboration over XML documents. In (Molli et al., 2003), we instantiated our framework to reconcile a file system and also text documents.

As usual, we model the XML document as a node-labelled ordered tree, and each XML element, be it leaf or non-leaf, corresponds to a node of that tree. Since we suppose the tree is ordered, the children of every node are ordered i.e. there is a first child, a second child, etc. Therefore, each node is uniquely identified by its path. This path is defined as the sequence of child number starting from the root. The path of the root node is denoted []. For instance, the XML document presented in Figure 1 is mapped to the tree depicted by Figure 2. And, the path [0, 1, 0] leads to the leaf labelled with the value The abstract is...

```
<?xml version="1.0" encoding="UTF-8"?>
<article>
  <sect1>
    <title>Abstract</title>
    <para>The abstract is ...</para>
  </sect1>
  <sect1>
    <title>Introduction</title>
    <para>Optimistic replication ...</para>
  </sect1>
</article>
```

Figure 1: An example of XML document.

We assume that the tree representation of an XML document can be changed by the following two operations:
is by decrementing the location.

A node of the tree is equivalent to first deleting this node and then inserting a new node.

The function `incPos` computes the result of the integration of the lexicographical order between the values, i.e., `incPos` computes a new path by incrementing the `(n+1)`th value of the path `p`, i.e., `incPos([3,2,1,4],2) = [3,2,2,4]`. In the same manner, the function `decPos` computes a new path by decrementing the `(n+1)`th value of the path `p`, i.e., `decPos([3,2,1,4],2) = [3,2,0,4]`. Finally, we define the function `codeInf(value1,value2)` which allows to compare two values `val1` and `val2`. It is always possible to define such a function. For example, for text nodes, `codeInf()` is defined on the lexicographical order between the values, i.e., `codeInf(Abstract,Introduction) = true`.

As we explained in section 2, a transformation function computes the result of the integration of two concurrent operations. So, for an XML tree, we have to consider all possible combination of operations defined on that XML tree. Thus, we have to defined transformation functions for each couple of operations: `(addNode(),addNode())`, `(delNode(),delNode())`, `(addNode(),delNode())` and `(delNode(),addNode())`. Due to space limitations, we are going to describe in details only the transformation function `T(addNode(),addNode())`.

Figure 4 indicates the complete definition of the transformation function `T` for two concurrent `addNode` operations. This function transforms `op1 = addNode(p1,n1,v1)` regarding `op2 = addNode(p2,n2,v2)`. The main idea of this function is to compare the insertion position of two concurrent addition of nodes in the XML tree. It has to consider the following cases:

- If the two additions operate on the same parent node, then `T` compares their insertion positions.
  - If `op1` inserts a child at a position after the insertion position of `op2` then the insertion position of `op1` has to be shifted one position to right. Therefore, its insertion position is incrementated.
  - If `op1` inserts a child before the insertion position of `op2`, then the insertion position of `op1` remains the same.
  - If `op1` and `op2` try to insert at the same position, `T` must decide the serialisation order. In the above definition, the decision of `T` is based on the `codeInf()` function, which compares the lexicographic value of nodes. If lexicographic values are equals, then `op1` and `op2` try to insert the same node at the same position, consequently, the function disables effect of `op1` by transforming it into an identity operation. Of course, this is an arbitrary choice, other solutions are possible such as the insertion of both nodes.

- If the two additions operate on different parent nodes, then the previous execution of `op2` might move the parent node of `op1`. This situation occurs when the parent node of `op1` is a child of the parent node of `op2`.

To illustrate, consider the initial XML tree given in the figure 4 and two concurrent operations `op2 = addNode([],1,X)` and `op1 = addNode(p1,n1,v1)` and `op2 = addNode(p2,n2,v2)`. If the two additions operate on the same parent node, then `T` compares their insertion positions.

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addNode([2], 1, Y). The execution of the operation op2 moves the parent node on which the operation op1 has to be executed. In other words, the transformation of the operation op1 regarding of the operation op2 must give the operation op1′ = addNode([2 + 1], 1, Y). To compute this operation, T has to compare and may update the position in the path of op1. This is achieved by using getPos() and incPos() functions. The resulting tree is depicted in figure 5.

In the same way, we wrote transformation functions for couples of operations delNode – delNode, addNode – delNode. In these cases, there is a critical point to consider: what to do when an operation removes a subtree while another concurrent one appends a node to this subtree? This is clearly a case of conflict. The solution we choose is to remove the subtree even if in this case the concurrent changes performed on this subtree are lost. This solution allows to ensure data convergence. To avoid this lost update, we assume that the system should provide an undo feature in order to restore lost changes if the convergent state is not suitable for users. This undo feature is subject to many research efforts(Sun, 2002).

Writing correct transformation functions regarding the TP1 property is not an easy task. The safety of the operational transformation approach relies on the correctness of transformation functions. If transformation functions do not verify TP1 then the integration algorithm cannot ensure convergence of copies. Proving TP1 property is error prone, time consuming and part of an iterative process. It is nearly impossible to do this by hand. In order to achieve this task, we used our VOTE environment (Imine et al., 2006) which is based on an automatic theorem prover. The input of this environment is exactly the definition of the transformation functions given in this paper. Describing our environment for verifying correctness of transformation functions is out of the scope of this paper, a more detailed description is available in (Imine et al., 2006; Imine et al., 2003).

In the following, we present a scenario illustrating how the So6 framework is working. It considers two users who are cooperating in the writing of an XML document. They are working in their own workspace respectively called site1 and site2. Each workspace contains a copy of the shared XML document. At the beginning, both copies are identical.

The different steps of this scenario are summarized as follows:

<table>
<thead>
<tr>
<th>site1</th>
<th>site2</th>
</tr>
</thead>
<tbody>
<tr>
<td>op1</td>
<td>op3</td>
</tr>
<tr>
<td>op2</td>
<td>commit (send op3)</td>
</tr>
<tr>
<td>update (compute op1′, op2′, op3)</td>
<td>commit (send op1′, op2′)</td>
</tr>
<tr>
<td>update (exec. op1′, op2′)</td>
<td></td>
</tr>
</tbody>
</table>

Users work concurrently to edit the document. The first user produces operations op1 and op2 while the second produces the operation op3. The states of the copies of the document including these modifications are depicted by the Figure 6. After that, the second user commits their modifications i.e. the operation op3 is sent to the timestamper. Later, the first user updates their workspace in order to integrate modifications published by the second user. During the update, the transformed operations op1′, op2′, op3′ are calculated. At this step, only the operation op1′ is locally executed. Then, the first user commits his modifications. During this step, op1′ and op2′ are sent to the timestamper. When the second user calls the update
procedure $op_1'$ and $op_2'$ are executed as-is on the local copy of the workspace $site_2$ (remember that this user does not perform new operation). At the end of the execution, both copies of the document converge towards a unique value.

5 RELATED WORK

Configuration Management (CM) tools (Berliner, 1990) are widely used for asynchronous collaborative editing. Users work in parallel, produce data divergence and reconcile later using the Copy-Modify-Merge paradigm. Reconciliation is performed by tight cooperation between version manager and merge tools. When a reconciliation is required, i.e. usually when a user updates their workspace, version manager provides required versions to merge tools (Munson and Dewan, 1994). Merge is performed locally in the workspace of the user. Merge tools extract from different versions concurrent logs of operations using differentiation algorithms (Chawathe and Garcia-Molina, 1997). These differentiation algorithms are specific to data types. Finally, concurrent operations are merged using ad-hoc algorithms specific to data types. An XML merge tool such as DeltaXML (Fontaine, 2002) or XyDiff (Cobena et al., 2002) can be used in conjunction with CM tools for supporting collaboration on XML data. However, in this approach, several merge tools are used: one for file systems, another one for text files and another one for XML files. Each merge tool has its own merge algorithm. They might not be consistent together if they do not apply the same strategy. For example, in CVS, the merge tool used for text files relies allows compensation contrary to the merge tool used at the file system level. Thus, whatever are the changes performed on a text file, they will always be merged into the new file version; even conflicting changes are put in the text file – they are delimited with special markups. After the merging, a user can compensate what has been performed by the merge tool by editing the content of the text file. Whereas the merge tool used at the file system level does not apply this principle, in the case it detects a conflict, the reconciliation process is stopped and the user is asked to solve the conflict. The operational transformation (OT) model is more general, more uniform and safer than the model used in CM tools. In the OT approach, the merge algorithm is shared by all transformation functions. It ensures convergence if underlying transformation functions ensure the $TP_1$ property. By this way, we can extend the reconciliation engine by adding new transformation functions without violating consistency.

Some propositions have been done in the OT model to work with XML data. Davis and al. (Davis et al., 2002) defined some transformation functions for SGML. These functions present some similarities with our transformations for XML. However, Davis and al. functions do not verify the $TP_1$ property. Thus, using these transformation functions in our framework will not ensure convergence of copies of shared data.

In (Shen and Sun, 2002), Shen et al. proposed a framework similar to our So6 framework. The main difference is when a conflict occurs between two concurrent operations, the operation coming from the repository is cancelled, and the local operation is preserved. Firstly, this choice is not acceptable since cancelling an operation means losing some previously published work. Secondly, the authors do not provide any information concerning the editing of a tree structure such as an XML document. In parallel to our work, Ignat et al. (Ignat and Norrie, 2006) extended the Shen et al.’s approach to a tree structured document. The main idea is to distribute the log of operations through the tree. Thus, each node is associated with a log containing the operations performed on its content, insertion and deletion of child nodes. Using this model, they are able to use transformation functions defined for a linear structure such as the one proposed for a string of characters by Ressel et al. (Ressel et al., 1996). Their proposition constitutes an alternative to our approach.

IceCube (Kermarrec et al., 2001) is a generic approach for reconciling divergent copies of documents. It handles reconciliation as a constraints optimisation problem: the one of executing an optimal combination of concurrent changes. IceCube uses semantic constraints between operations that the reconciliation algorithm has to preserve. Basically, IceCube explores all possible combinations of concurrent operations and reject all combinations violating constraints. This approach is interesting because, IceCube is looking for the combinations of concurrent operations that minimize conflicts of reconciliation. Maybe, on this point, the operational transformation approach will not find the optimal reconciliation. On the other hand, IceCube has some intrinsic drawbacks: Combinatorial explosion can occur during the first stage of reconciliation.

The Harmony project (Foster et al., 2005) is a generic framework for reconciling divergent copies. In this framework, the reconciliation process exploits schema of the structures being synchronized to achieve a better accuracy. This framework relies on a state-based approach which means three copies of the document – the two divergent copies and the com-
mon ancestor document – are required for reconciliation. As most state-based synchronizer, the goal of the reconciliation engine is to make divergent copies more similar. In other words, convergence of copies is not achieved in all cases, but changes performed by a user will never be backed up. Indeed, in case conflicting changes are detected between two copies, the conflicts are marked but the copies remain divergent. On the contrary, our framework will always ensure convergence of copies. Simply, in a case of conflicting changes, these changes will be transformed to be integrated as conflicting changes in the copies. This allows every participant to solve later the conflict. We think sharing conflicts is useful, because sometimes the user who gets the conflict is not the user who has the knowledge to solve it.

6 CONCLUSION

We have presented the SO6 framework for supporting cooperative writing over documents. This framework relies on a theoretical model called operational transformation approach. Our framework is generic in the sense it can be instantiated to manage multiple types of document. In order to illustrate these feature, we explained how to enable cooperative writing of XML documents. This framework and the presented transformation functions are integrated in the SO6 revision management tool included in the LibreSource (http://www.libresource.org/) collaborative platform. This tool is able to reconcile copies of a file system containing text documents and XML documents.

If our framework ensures convergence, the convergence state may violate the DTD. For example suppose two users add concurrently a "title" element in an XML document. From the point of view of an ordered tree, two title nodes can appear under the root. However, from the point of view of the DTD, only one title is allowed. Finally, the SO6 framework is able to compute a convergence state, but this state may violate the DTD. This is clearly an open issue for the SO6 framework and for XML merge tools.

REFERENCES


