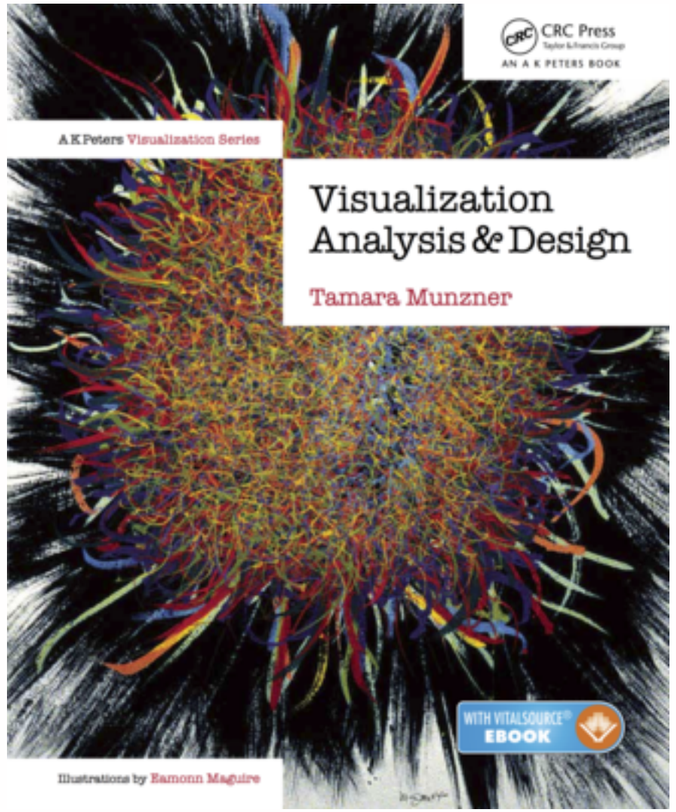
Visualization Analysis & Design

Tamara Munzner
Department of Computer Science
University of British Columbia



D3 Unconference Keynote
November 21 2015, San Francisco CA

http://www.cs.ubc.ca/~tmm/talks.html#vad15d3

@tamaramunzner

Defining visualization (vis)

Computer-based visualization systems provide visual representations of datasets designed to help people carry out tasks more effectively.

Why?...

Why have a human in the loop?

Computer-based visualization systems provide visual representations of datasets designed to help people carry out tasks more effectively.

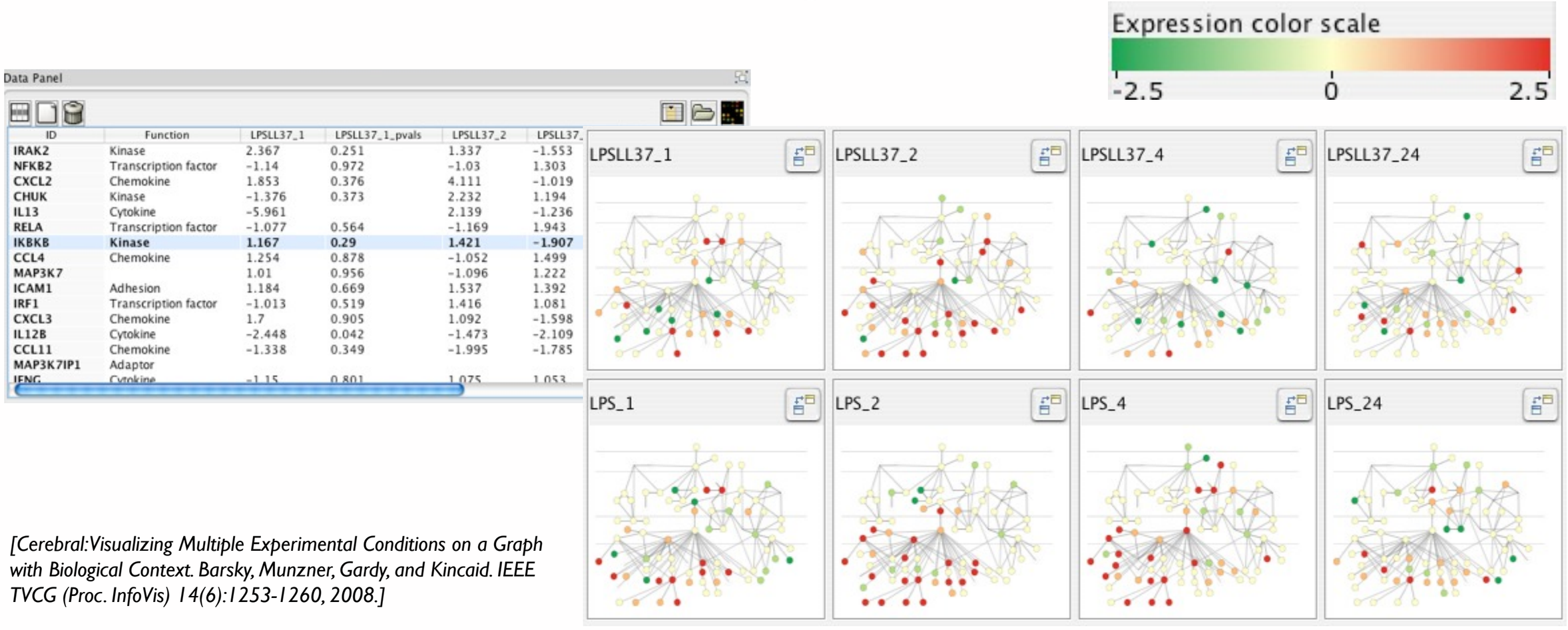
Visualization is suitable when there is a need to augment human capabilities rather than replace people with computational decision-making methods.

- don't need vis when fully automatic solution exists and is trusted
- many analysis problems ill-specified
  - don't know exactly what questions to ask in advance
- possibilities
  - long-term use for end users (e.g. exploratory analysis of scientific data)
  - presentation of known results
  - stepping stone to better understanding of requirements before developing models
  - help developers of automatic solution refine/debug, determine parameters
  - help end users of automatic solutions verify, build trust

Why use an external representation?

Computer-based visualization systems provide visual representations of datasets designed to help people carry out tasks more effectively.

- external representation: replace cognition with perception



[Cerebral:Visualizing Multiple Experimental Conditions on a Graph with Biological Context. Barsky, Munzner, Gardy, and Kincaid. IEEE TVCG (Proc. InfoVis) 14(6):1253-1260, 2008.]

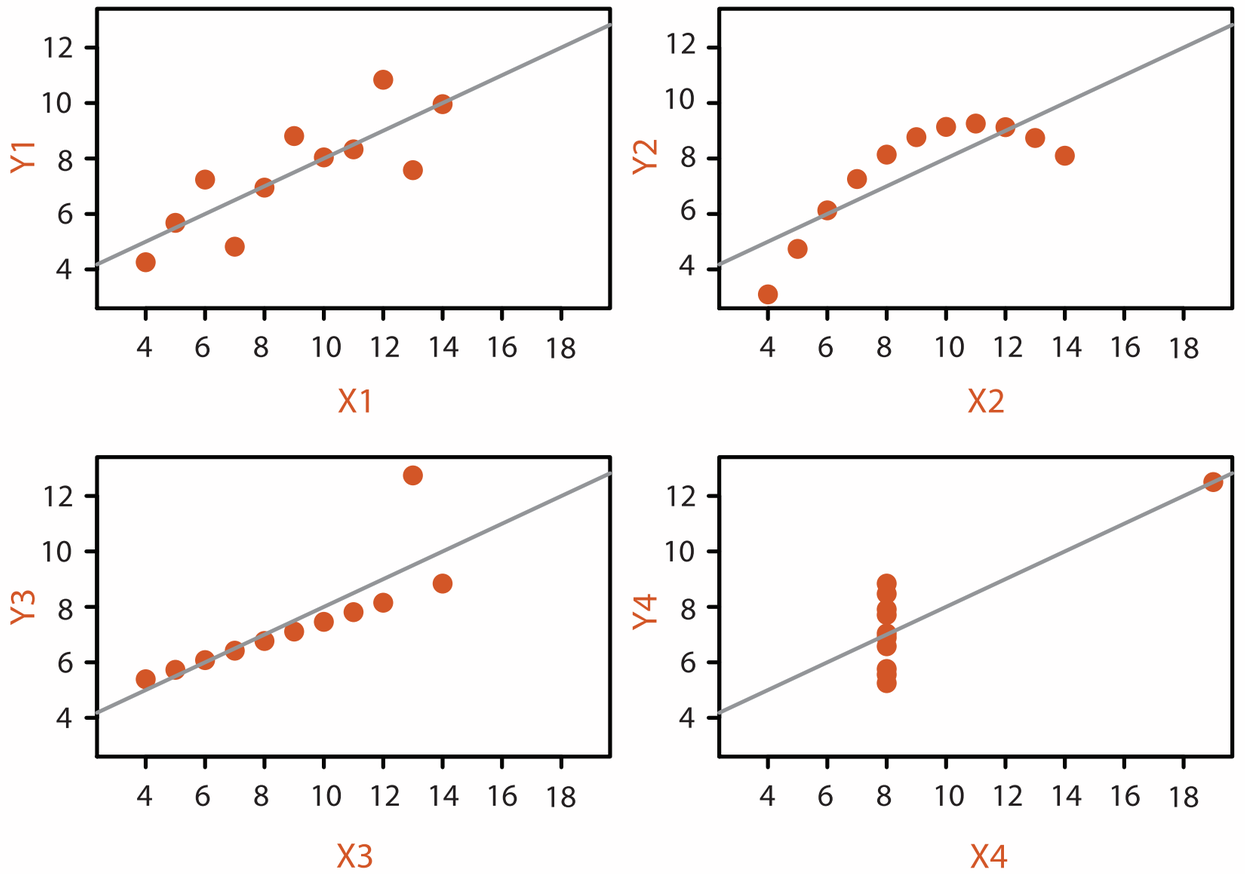
Why represent all the data?

Computer-based visualization systems provide visual representations of datasets designed to help people carry out tasks more effectively.

- summaries lose information, details matter
  - confirm expected and find unexpected patterns
  - assess validity of statistical model

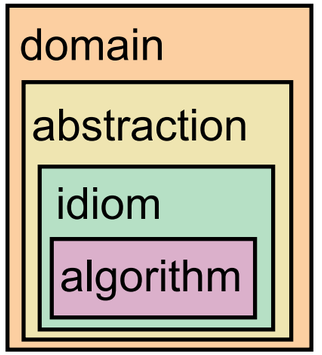
Anscombe's Quartet

Identical statistics	
x mean	9
x variance	10
y mean	8
y variance	4
x/y correlation	1

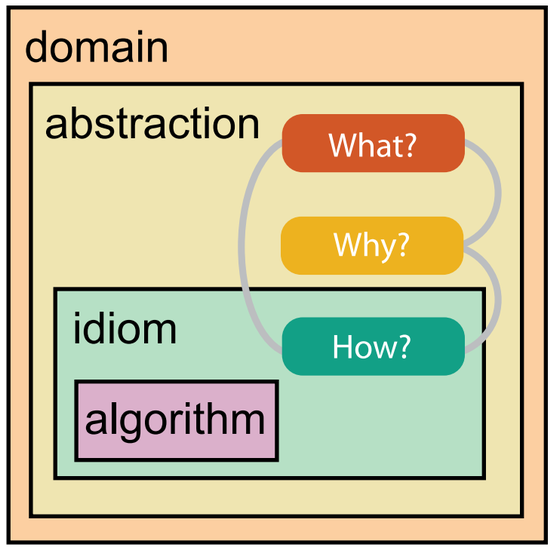


Analysis framework: Four levels, three questions

- *domain* situation
  - who are the target users?
- *abstraction*
  - translate from specifics of domain to vocabulary of vis
  - **what** is shown? **data abstraction**
    - often don't just draw what you're given: transform to new form
  - **why** is the user looking at it? **task abstraction**
- *idiom*
  - **how** is it shown?
    - **visual encoding idiom**: how to draw
    - **interaction idiom**: how to manipulate
- *algorithm*
  - efficient computation



[A Nested Model of Visualization Design and Validation.
Munzner. IEEE TVCG 15(6):921-928, 2009 (Proc. InfoVis 2009).]



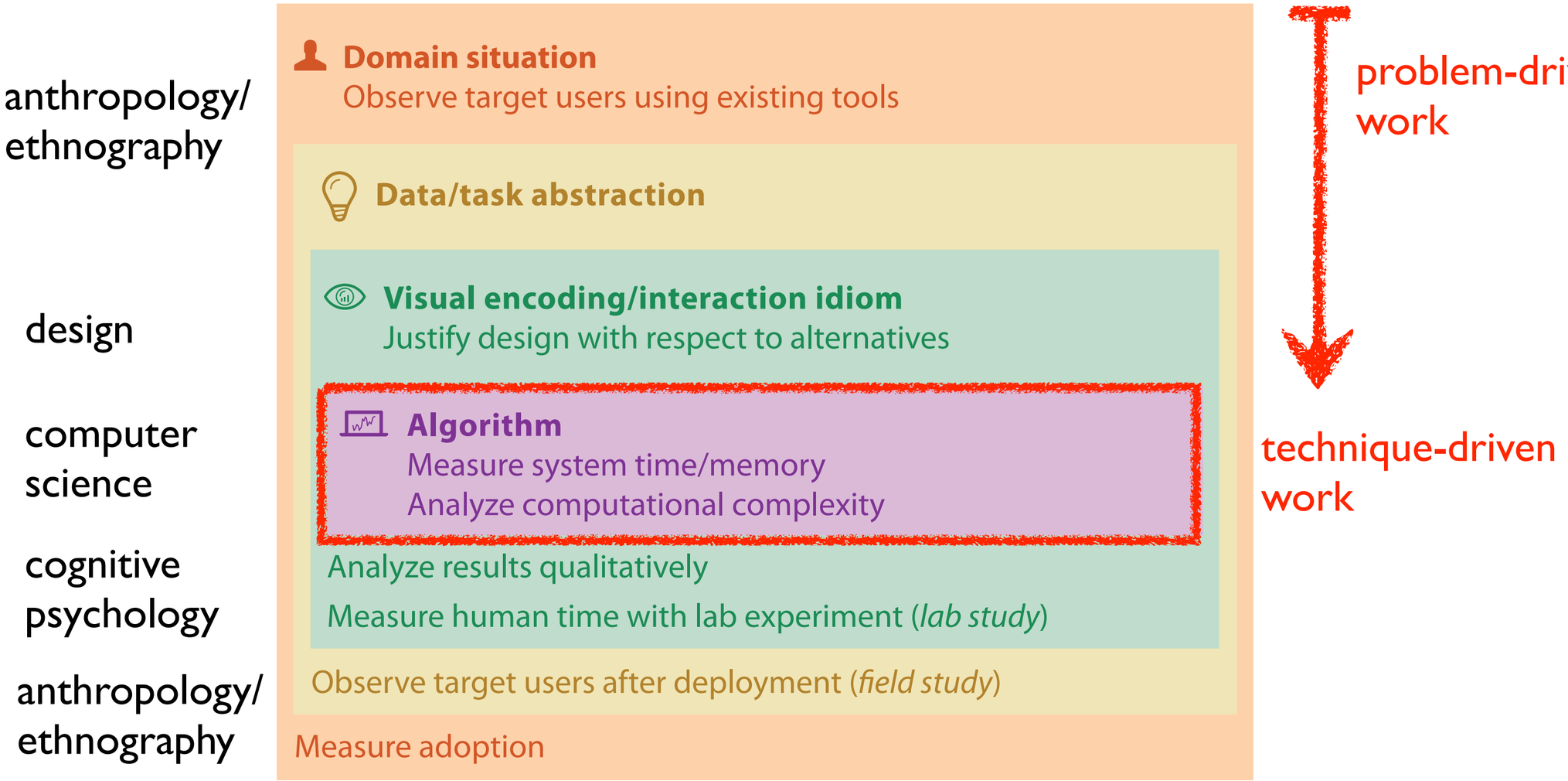
[A Multi-Level Typology of Abstract Visualization Tasks
Brehmer and Munzner. IEEE TVCG 19(12):2376-2385, 2013 (Proc. InfoVis 2013).]

Why is validation difficult?

- different ways to get it wrong at each level

Why is validation difficult?

- solution: use methods from different fields at each level

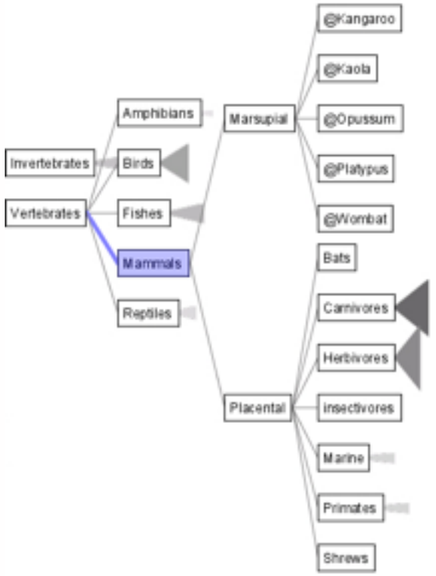


[A Nested Model of Visualization Design and Validation. Munzner. IEEE TVCG 15(6):921-928, 2009 (Proc. InfoVis 2009).]

Why analyze?

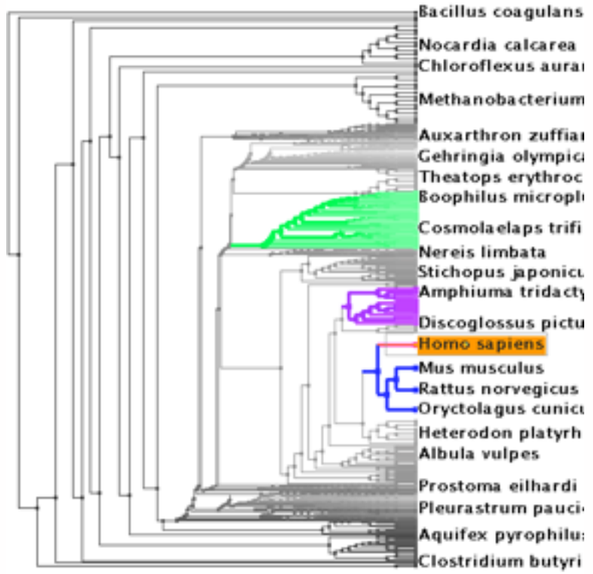
- imposes a structure on huge design space
  - scaffold to help you think systematically about choices
  - analyzing existing as stepping stone to designing new

SpaceTree



[SpaceTree: Supporting Exploration in Large Node Link Tree, Design Evolution and Empirical Evaluation. Grosjean, Plaisant, and Bederson. Proc. InfoVis 2002, p 57–64.]

TreeJuxtaposer



[TreeJuxtaposer: Scalable Tree Comparison Using Focus +Context With Guaranteed Visibility. ACM Trans. on Graphics (Proc. SIGGRAPH) 22:453– 462, 2003.]

What?

- Tree

Why?

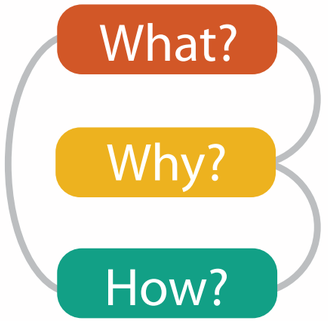
- Actions
  - Present → Locate → Identify

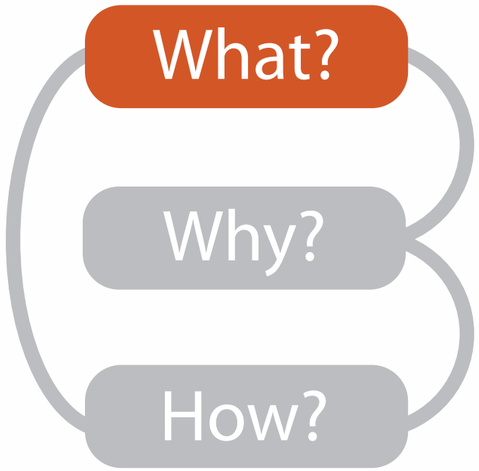
- Targets
  - Path between two nodes

How?

- SpaceTree
  - Encode → Navigate → Select → Filter → Aggregate

- TreeJuxtaposer
  - Encode → Navigate → Select → Arrange





What?

Datasets

Data Types

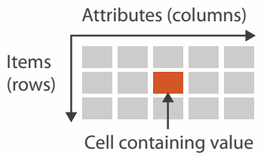
→ Items → Attributes → Links → Positions → Grids

Data and Dataset Types

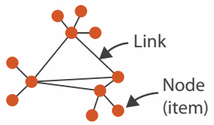
Tables	Networks & Trees	Fields	Geometry	Clusters, Sets, Lists
Items	Items (nodes)	Grids	Items	Items
Attributes	Links	Positions	Positions	
	Attributes	Attributes		

Dataset Types

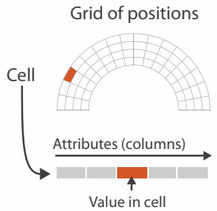
→ Tables



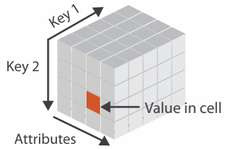
→ Networks



→ Fields (Continuous)



→ *Multidimensional Table*



→ *Trees*

→ Geometry (Spatial)

Dataset Availability

→ Static

→ Dynamic

Attributes

Attribute Types

→ Categorical

→ Ordered

→ *Ordinal*

→ *Quantitative*

Ordering Direction

→ Sequential

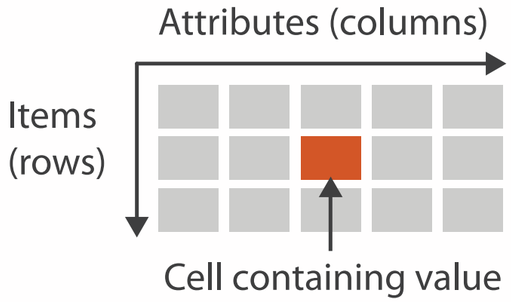
→ Diverging

→ Cyclic

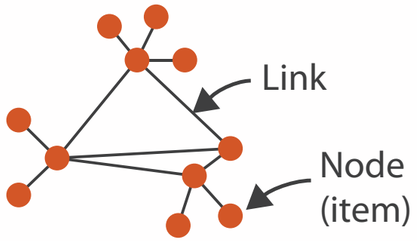
Types: Datasets and data

Dataset Types

Tables

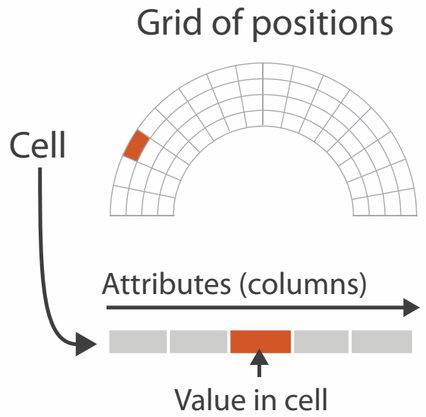


Networks

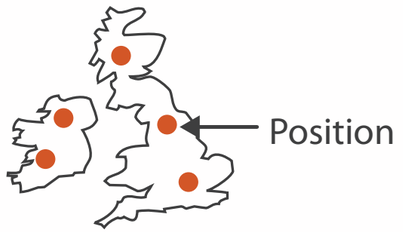


Spatial

Fields (Continuous)



Geometry (Spatial)



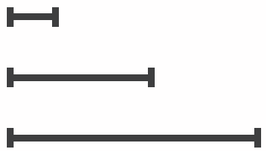
Attribute Types

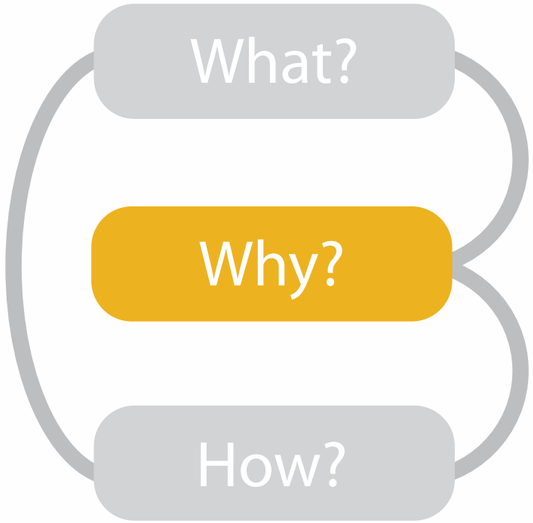
Categorical

Ordered

Ordinal

Quantitative





- {action, target} pairs
  - *discover distribution*
  - *compare trends*
  - *locate outliers*
  - *browse topology*

Why?

Actions

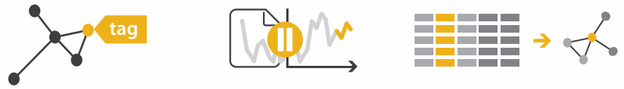
Analyze

→ Consume

→ *Discover* → *Present* → *Enjoy*

→ Produce

→ *Annotate* → *Record* → *Derive*

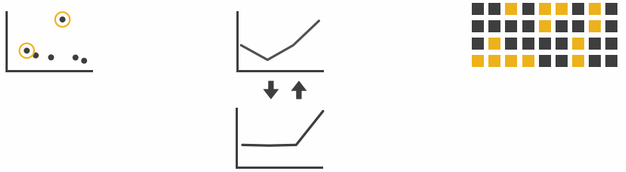


Search

	Target known	Target unknown
Location known	*Lookup*	*Browse*
Location unknown	*Locate*	*Explore*

Query

→ Identify → Compare → Summarize



Targets

All Data

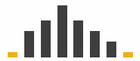
→ Trends → Outliers → Features

Attributes

→ One → Many

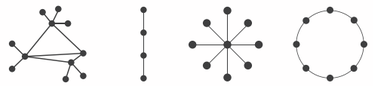
→ *Distribution* → *Dependency* → *Correlation* → *Similarity*

→ *Extremes*



Network Data

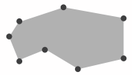
→ Topology

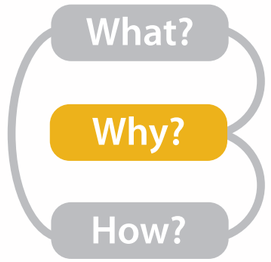


→ *Paths*

Spatial Data

→ Shape





Actions 1: Analyze

- consume
  - discover vs present
    - classic split
    - aka explore vs explain
  - enjoy
    - newcomer
    - aka casual, social
- produce
  - annotate, record
  - derive
    - crucial design choice

➔ **Analyze**

➔ Consume

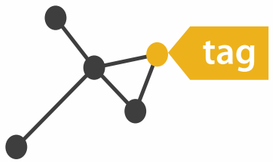
➔ *Discover*

➔ *Present*

➔ *Enjoy*

➔ Produce

➔ *Annotate*

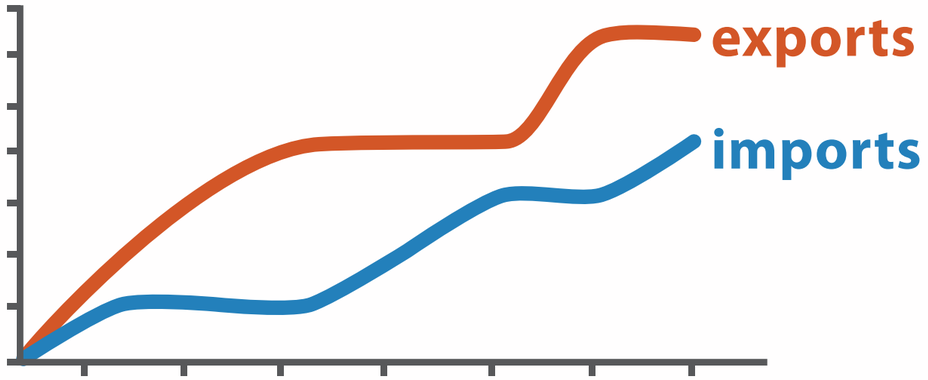


➔ *Record*

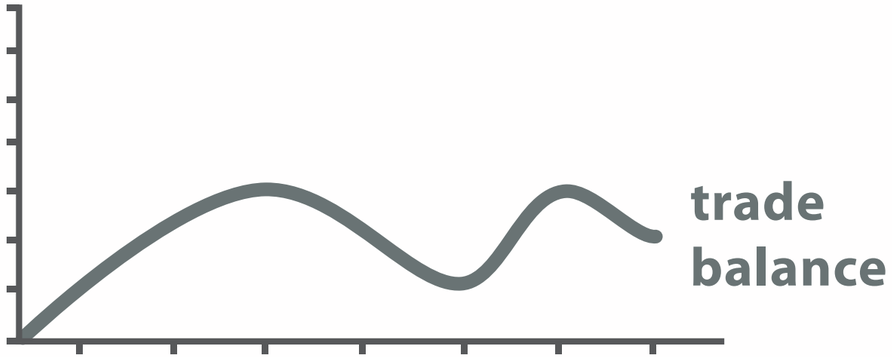
➔ *Derive*

Derive

- don't just draw what you're given!
  - decide what the right thing to show is
  - create it with a series of transformations from the original dataset
  - draw that
- one of the four major strategies for handling complexity



Original Data



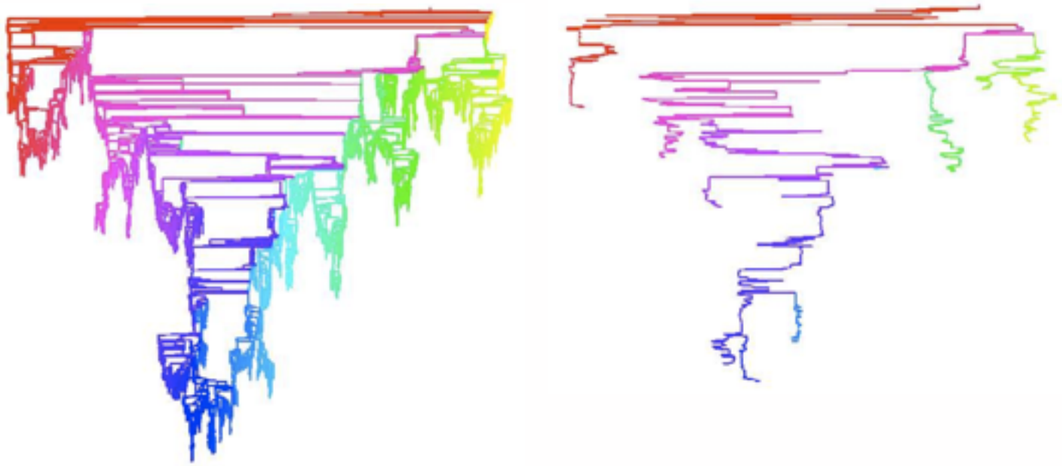
trade balance = *exports* – *imports*

Derived Data

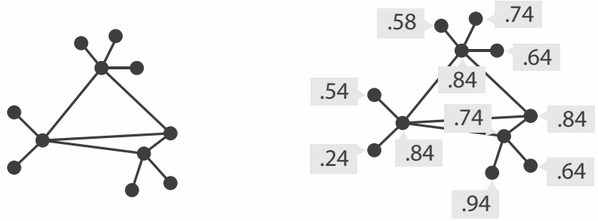
Analysis example: Derive one attribute

- Strahler number
  - centrality metric for trees/networks
  - derived quantitative attribute
  - draw top 5K of 500K for good skeleton

[Using Strahler numbers for real time visual exploration of huge graphs. Auber. Proc. Intl. Conf. Computer Vision and Graphics, pp. 56–69, 2002.]



Task 1



In
Tree

Out
Quantitative attribute on nodes

What?

- In Tree
- Out Quantitative attribute on nodes

Why?

- Derive

Task 2

In
Tree

+

In
Quantitative attribute on nodes

Out
Filtered Tree
Removed unimportant parts

What?

- In Tree
- In Quantitative attribute on nodes
- Out Filtered Tree

Why?

- Summarize
- Topology

How?

- Reduce
- Filter

Actions II: Search

- what does user know?
  - target, location

Search

	Target known	Target unknown
Location known	 *Lookup*	 *Browse*
Location unknown	 *Locate*	 *Explore*

Actions III: Query

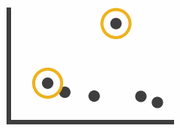
- what does user know?
  - target, location
- how much of the data matters?
  - one, some, all
- analyze, search, query
  - independent choices for each

Search

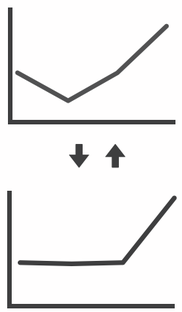
	Target known	Target unknown
Location known	*Lookup*	*Browse*
Location unknown	*Locate*	*Explore*

Query

→ Identify



→ Compare



→ Summarize

Targets

All Data

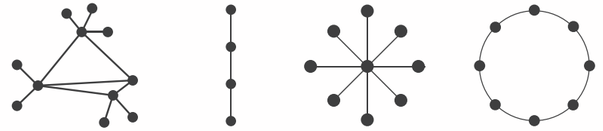
- Trends
- Outliers
- Features

Attributes

- One
  - *Distribution*
  - *Extremes*
- Many
  - *Dependency*
  - *Correlation*
  - *Similarity*

Network Data

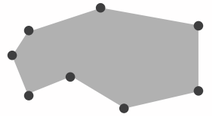
- Topology



- *Paths*

Spatial Data

- Shape



How?

Encode

Arrange

- Express
- Separate
- Order
- Align
- Use

Map

from categorical and ordered attributes

- Color
  - *Hue*
  - *Saturation*
  - *Luminance*
- Size, Angle, Curvature, ...
- Shape
- Motion

Direction, Rate, Frequency, ...

Manipulate

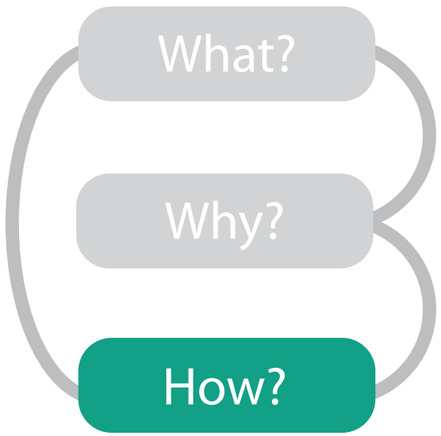
- Change
- Select
- Navigate

Facet

- Juxtapose
- Partition
- Superimpose

Reduce

- Filter
- Aggregate
- Embed



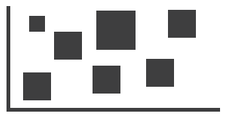
How to encode: Arrange space, map channels

Encode

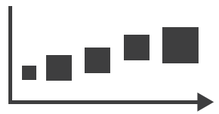
Arrange

- Express

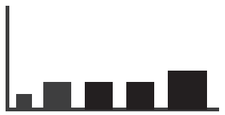
- Separate



- Order



- Align



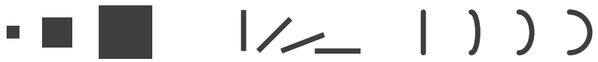
- Use

Map

from categorical and ordered attributes

- Color
  - *Hue*
  - *Saturation*
  - *Luminance*

- Size, Angle, Curvature, ...

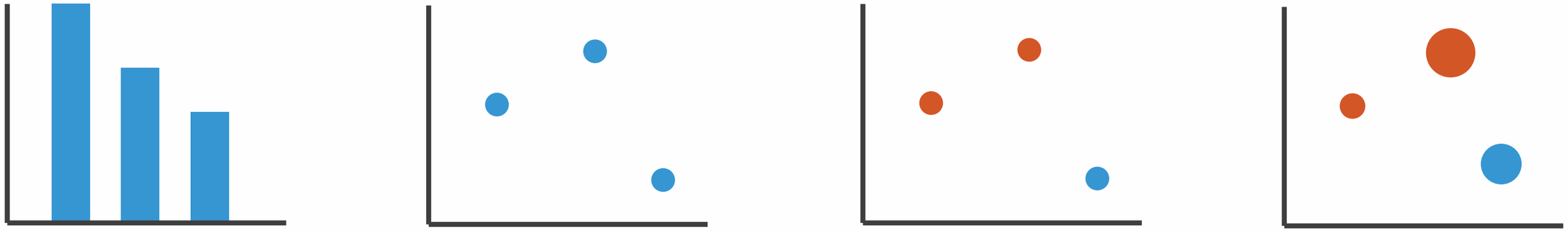


- Shape

- Motion
  Direction, Rate, Frequency, ...

Encoding visually

- analyze idiom structure



Definitions: Marks and channels

- marks
  - geometric primitives

Points Lines Areas

- channels
  - control appearance of marks

Position

Horizontal Vertical Both

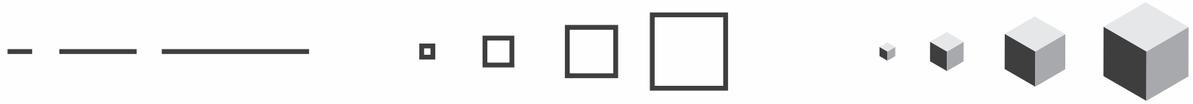
Color

Shape

Tilt

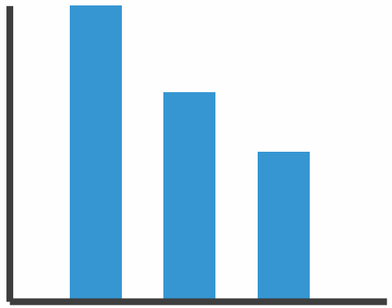
Size

Length Area Volume



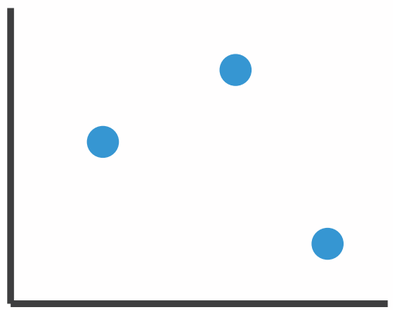
Encoding visually with marks and channels

- analyze idiom structure
  - as combination of marks and channels



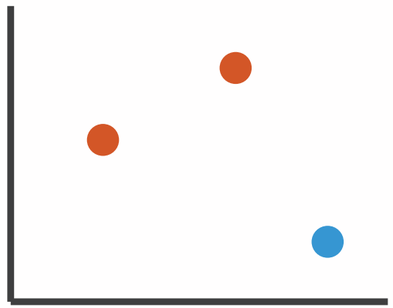
1:
vertical position

mark: line



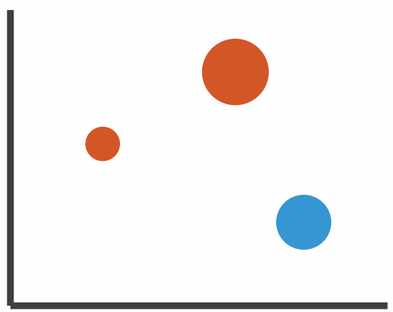
2:
vertical position
horizontal position

mark: point



3:
vertical position
horizontal position
color hue

mark: point



4:
vertical position
horizontal position
color hue
size (area)

mark: point

Channels

Position on common scale

Position on unaligned scale

Length (1D size)

Tilt/angle

Area (2D size)

Depth (3D position)

Color luminance

Color saturation

Curvature

Volume (3D size)

Same

Same

Spatial region

Color hue

Motion

Shape

Channels: Matching Types

Magnitude Channels: Ordered Attributes

Position on common scale

Position on unaligned scale

Length (1D size)

Tilt/angle

Area (2D size)

Depth (3D position)

Color luminance

Color saturation

Curvature

Volume (3D size)

Same

Same

Identity Channels: Categorical Attributes

Spatial region

Color hue

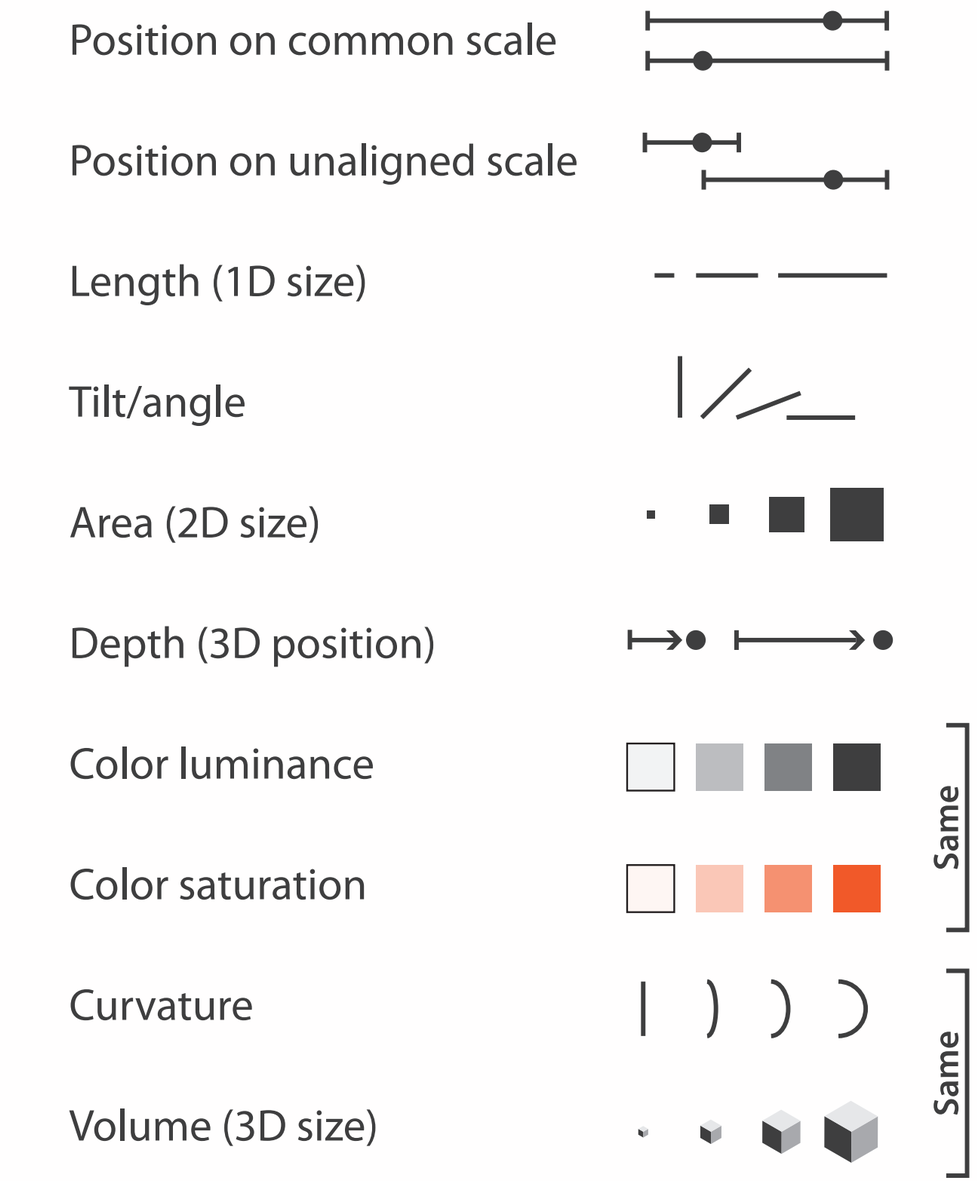
Motion

Shape

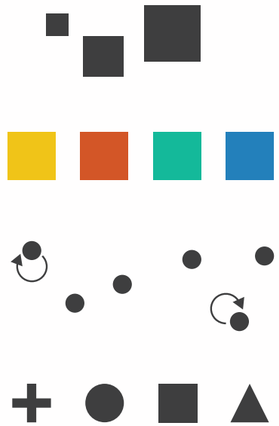
- expressiveness principle
  - match channel and data characteristics

Channels: Rankings

Magnitude Channels: Ordered Attributes



Identity Channels: Categorical Attributes



- expressiveness principle
  - match channel and data characteristics
- effectiveness principle
  - encode most important attributes with highest ranked channels

How?

Encode

Arrange

- Express
- Separate
- Order
- Align
- Use

Map

from categorical and ordered attributes

- Color
  - *Hue*
  - *Saturation*
  - *Luminance*
- Size, Angle, Curvature, ...
- Shape
- Motion

Direction, Rate, Frequency, ...

Manipulate

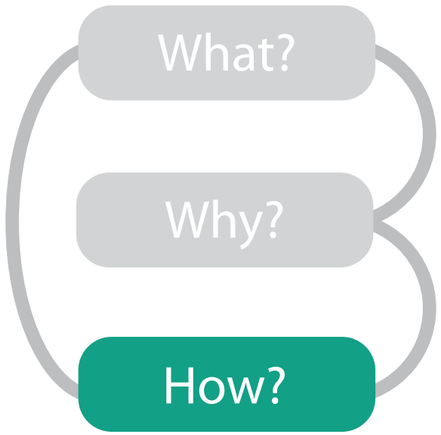
- Change
- Select
- Navigate

Facet

- Juxtapose
- Partition
- Superimpose

Reduce

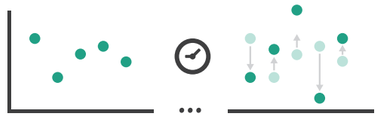
- Filter
- Aggregate
- Embed



How to handle complexity: 3 more strategies + 1 previous

Manipulate

- Change



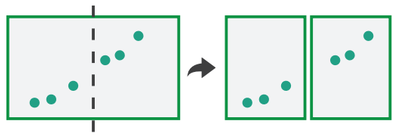
- Select

- Navigate

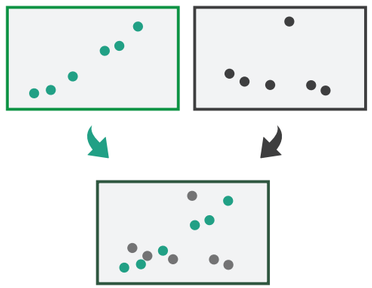
Facet

- Juxtapose

- Partition



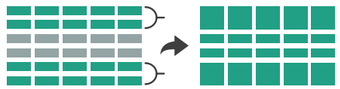
- Superimpose



Reduce

- Filter

- Aggregate



- Embed

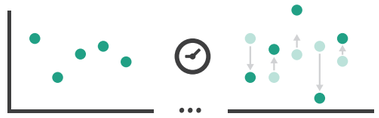
→ *Derive*

- change view over time
- facet across multiple views
- reduce items/attributes within single view
- derive new data to show within view

How to handle complexity: 3 more strategies + 1 previous

Manipulate

- Change



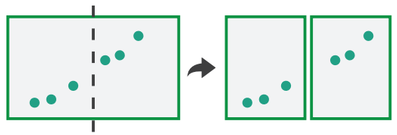
- Select

- Navigate

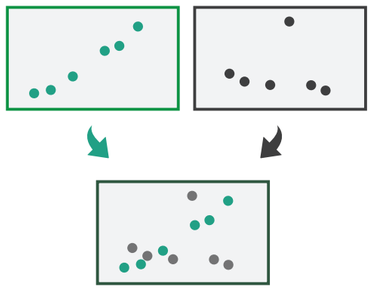
Facet

- Juxtapose

- Partition



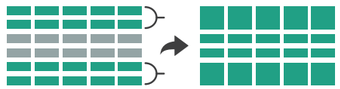
- Superimpose



Reduce

- Filter

- Aggregate



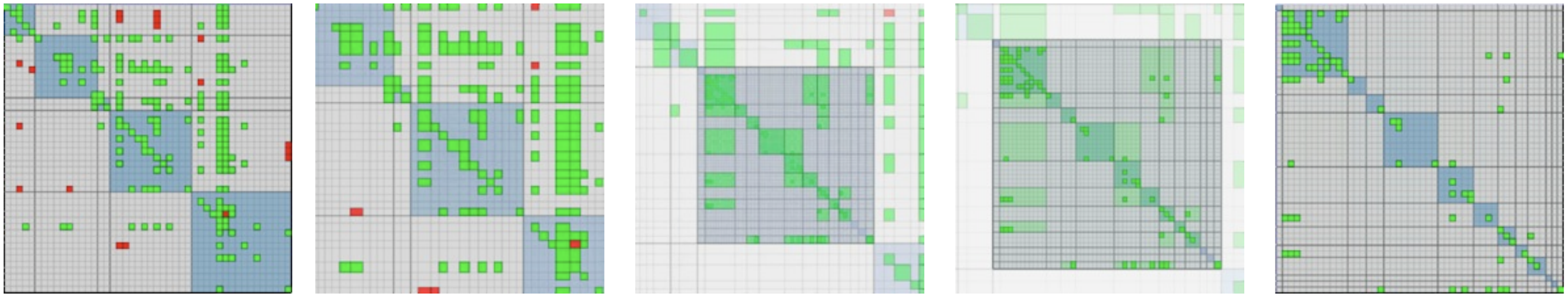
- Embed

→ *Derive*

- change over time
  - most obvious & flexible of the 4 strategies

Idiom: **Animated transitions**

- smooth transition from one state to another
  - alternative to jump cuts
  - support for item tracking when amount of change is limited
- example: multilevel matrix views
  - scope of what is shown narrows down
    - middle block stretches to fill space, additional structure appears within
    - other blocks squish down to increasingly aggregated representations



[Using Multilevel Call Matrices in Large Software Projects. van Ham. Proc. IEEE Symp. Information Visualization (InfoVis), pp. 227–232, 2003.]

How to handle complexity: 3 more strategies + 1 previous

Manipulate

- Change
- Select
- Navigate

Facet

- Juxtapose
- Partition
- Superimpose

Reduce

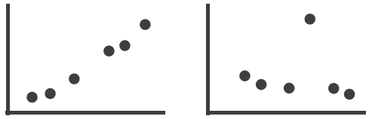
- Filter
- Aggregate
- Embed

→ *Derive*

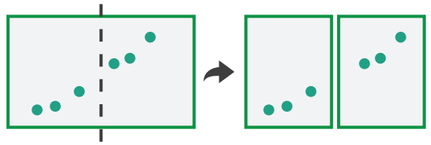
- facet data across multiple views

Facet

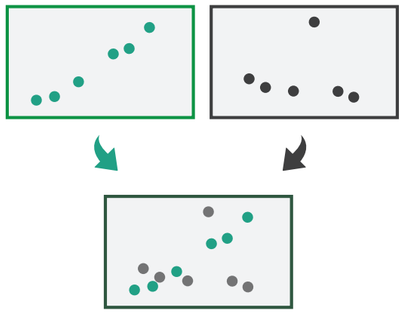
Juxtapose



Partition



Superimpose



Coordinate Multiple Side By Side Views

Share Encoding: Same/Different

Linked Highlighting

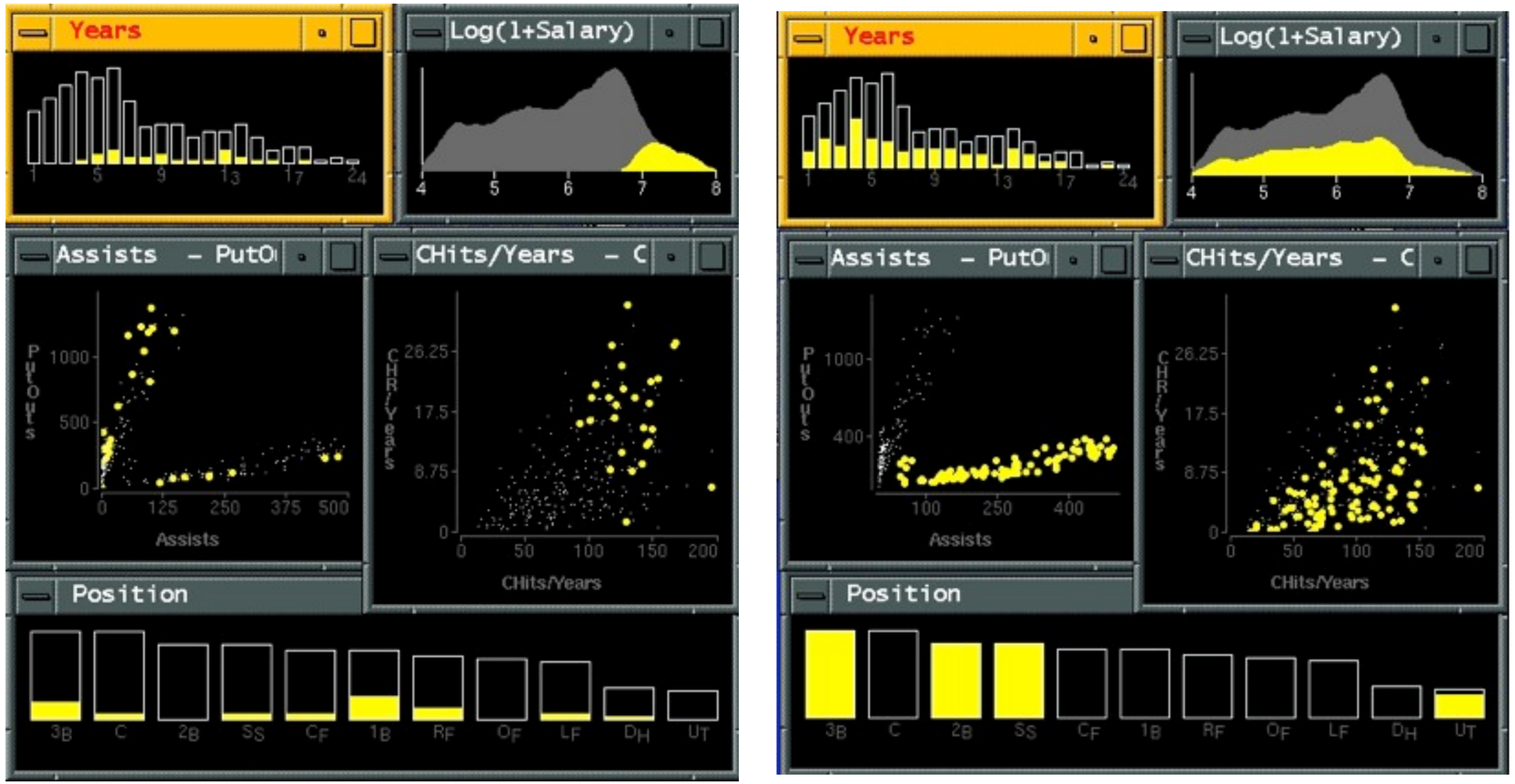
Share Data: All/Subset/None

Share Navigation

Idiom: **Linked highlighting**

System: **EDV**

- see how regions contiguous in one view are distributed within another
  - powerful and pervasive interaction idiom
- encoding: different
  - ***multiform***
- data: all shared



[Visual Exploration of Large Structured Datasets. Wills. Proc. New Techniques and Trends in Statistics (NTTS), pp. 237–246. IOS Press, 1995.]

Idiom: **bird's-eye maps**

System: **Google Maps**

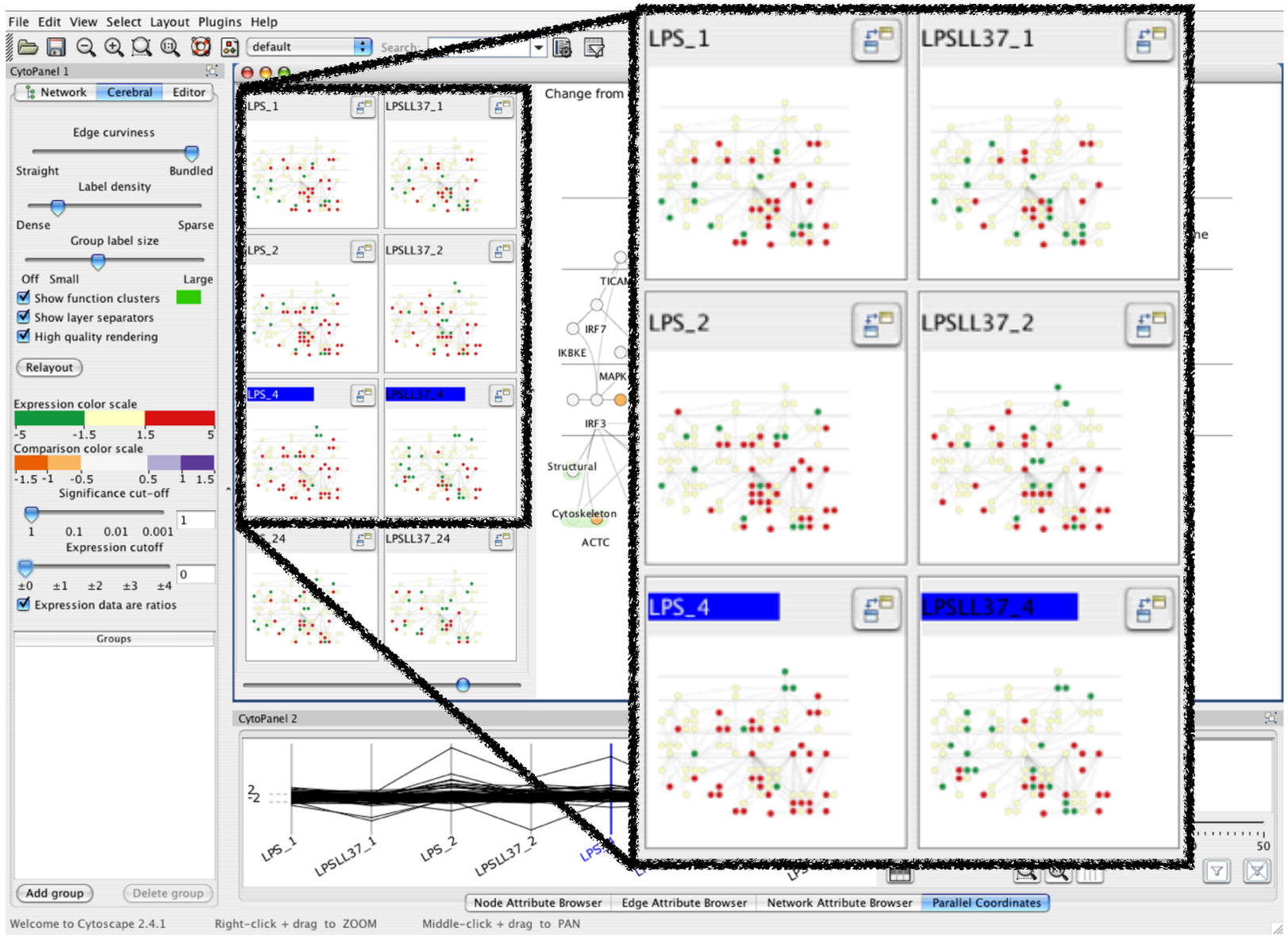
- encoding: same
- data: subset shared
- navigation: shared
  - bidirectional linking
- differences
  - viewpoint
  - (size)
- ***overview-detail***

[A Review of Overview+Detail, Zooming, and Focus+Context Interfaces. Cockburn, Karlson, and Bederson. ACM Computing Surveys 41:1 (2008), 1–31.]

Idiom: **Small multiples**

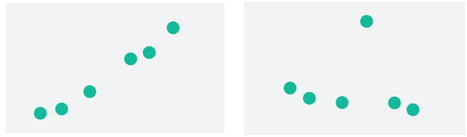
System: **Cerebral**

- encoding: same
- data: none shared
  - different attributes for node colors
  - (same network layout)
- navigation: shared



[Cerebral:Visualizing Multiple Experimental Conditions on a Graph with Biological Context. Barsky, Munzner, Gardy, and Kincaid. IEEE Trans. Visualization and Computer Graphics (Proc. InfoVis 2008) 14:6 (2008), 1253–1260.]

Coordinate views: Design choice interaction

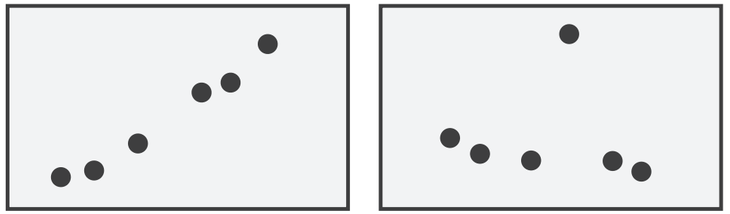
		Data		
		All	Subset	None
Encoding	Same	Redundant	 Overview/ Detail	 Small Multiples
	Different	 Multiform	 Multiform, Overview/ Detail	No Linkage

- why juxtapose views?
  - benefits: eyes vs memory
    - lower cognitive load to move eyes between 2 views than remembering previous state with single changing view
  - costs: display area, 2 views side by side each have only half the area of one view

Partition into views

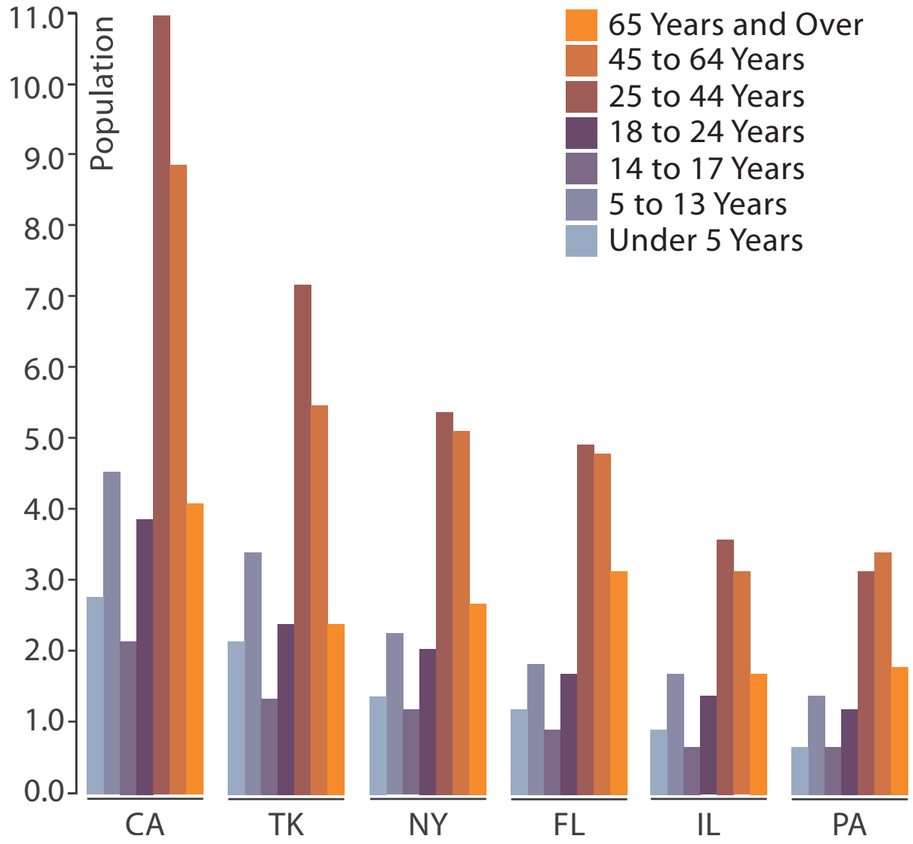
- how to divide data between views
  - encodes association between items using spatial proximity
  - major implications for what patterns are visible
  - split according to attributes
- design choices
  - how many splits
    - all the way down: one mark per region?
    - stop earlier, for more complex structure within region?
  - order in which attribs used to split
  - how many views

➔ **Partition into Side-by-Side Views**



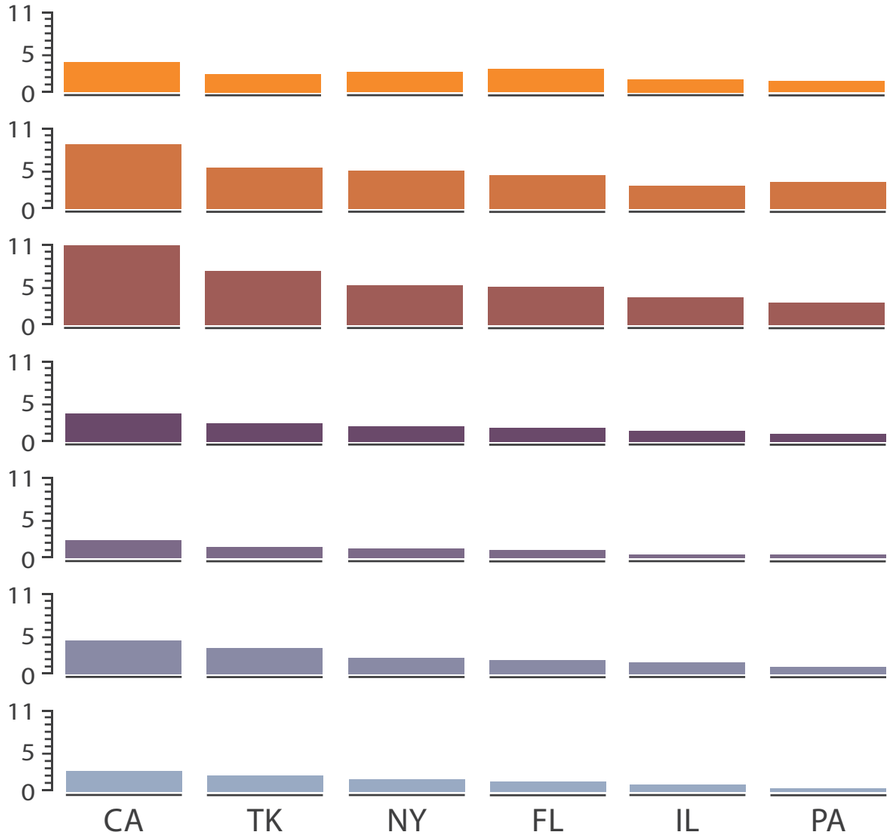
Partitioning: List alignment

- single bar chart with grouped bars
  - split by state into regions
    - complex glyph within each region showing all ages
  - compare: easy within state, hard across ages



http:/bl.ocks.org/mbostock/3887051 *http:/bl.ocks.org/mbostock/4679202*

- small-multiple bar charts
  - split by age into regions
    - one chart per region
  - compare: easy within age, harder across states

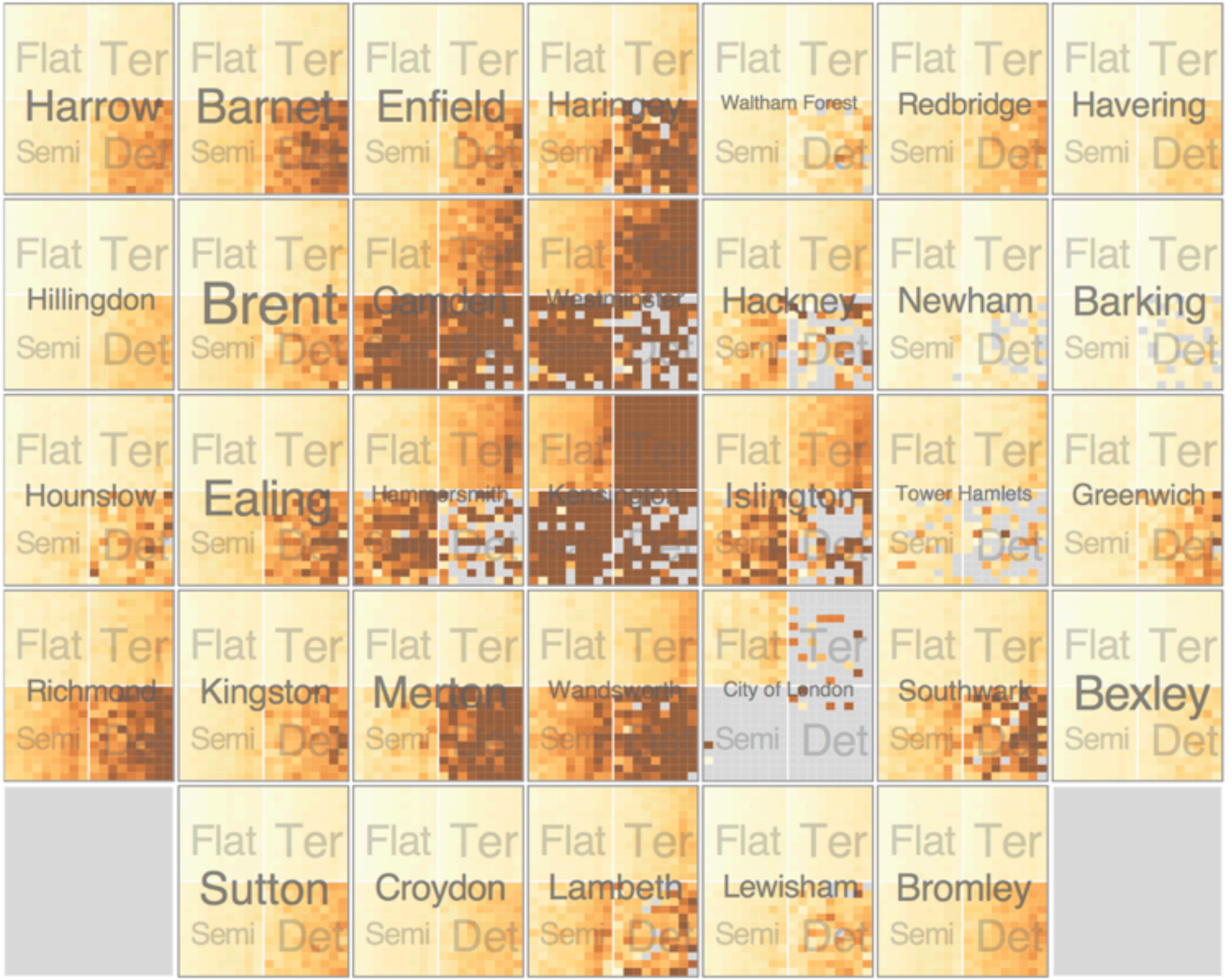


Partitioning: Recursive subdivision

System: **HIVE**

- split by neighborhood
- then by type
- then time
  - years as rows
  - months as columns
- color by price

- neighborhood patterns
  - where it's expensive
  - where you pay much more for detached type



[Configuring Hierarchical Layouts to Address Research Questions. Slingsby, Dykes, and Wood. IEEE Transactions on Visualization and Computer Graphics (Proc. InfoVis 2009) 15:6 (2009), 977–984.]

Partitioning: Recursive subdivision

System: **HIVE**

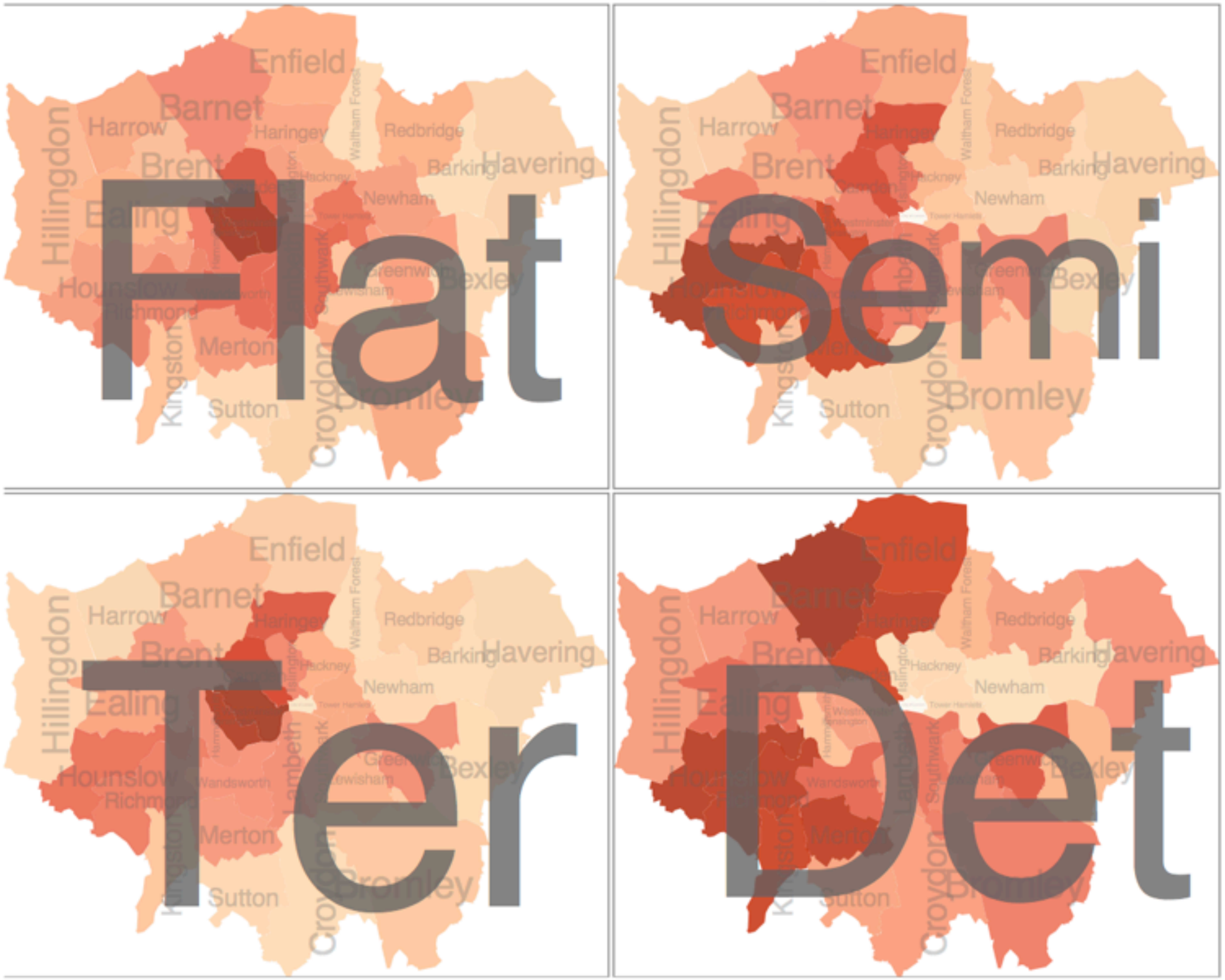
- switch order of splits
  - type then neighborhood
- switch color
  - by price variation
- type patterns
  - within specific type, which neighborhoods inconsistent

[Configuring Hierarchical Layouts to Address Research Questions. Slingsby, Dykes, and Wood. IEEE Transactions on Visualization and Computer Graphics (Proc. InfoVis 2009) 15:6 (2009), 977–984.]

Partitioning: Recursive subdivision

System: **HIVE**

- different encoding for second-level regions
  - choropleth maps



[Configuring Hierarchical Layouts to Address Research Questions. Slingsby, Dykes, and Wood. IEEE Transactions on Visualization and Computer Graphics (Proc. InfoVis 2009) 15:6 (2009), 977–984.]

How to handle complexity: 3 more strategies + 1 previous

Manipulate

- Change
- Select
- Navigate

Facet

- Juxtapose
- Partition
- Superimpose

Reduce

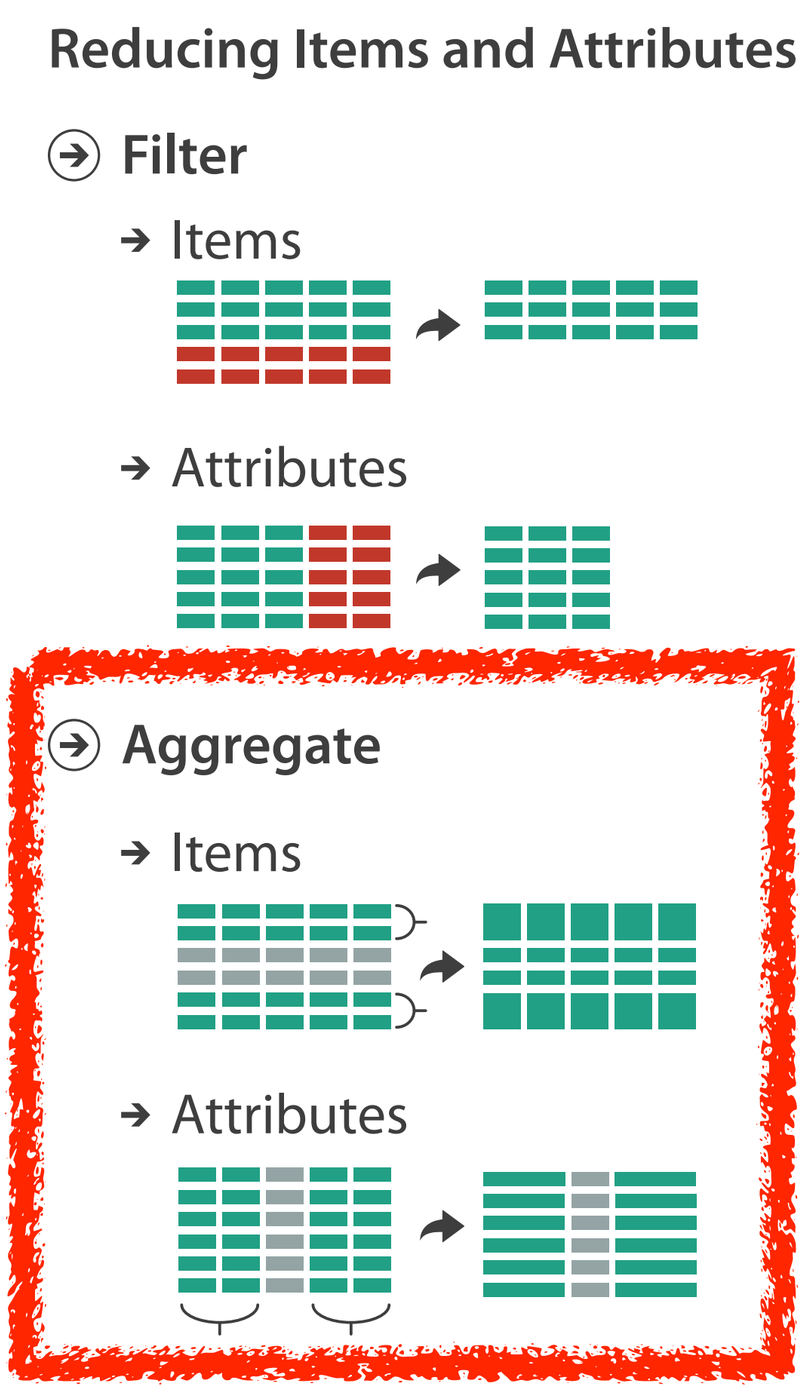
- Filter
- Aggregate
- Embed

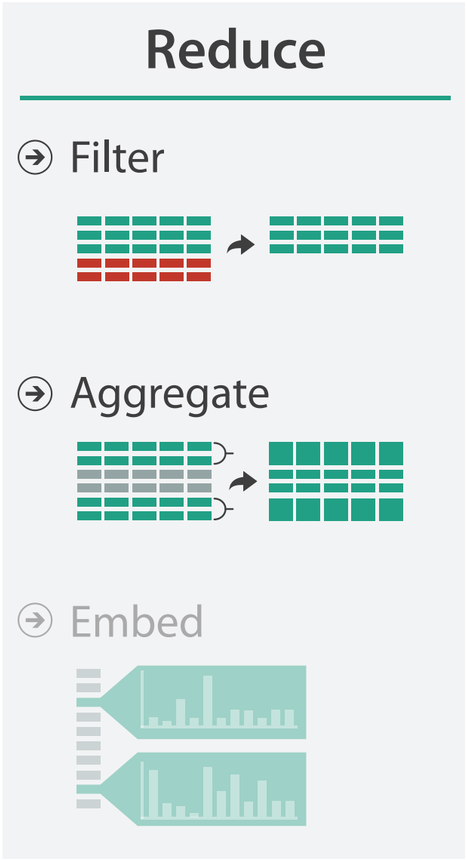
→ *Derive*

- reduce what is shown within single view

Reduce items and attributes

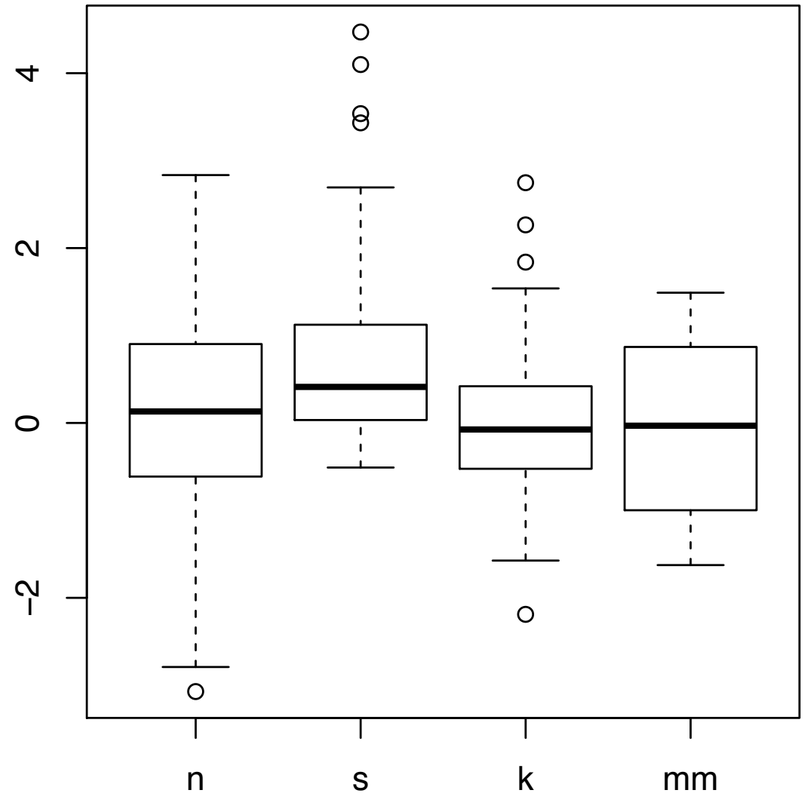
- reduce/increase: inverses
- filter
  - pro: straightforward and intuitive
    - to understand and compute
  - con: out of sight, out of mind
- aggregation
  - pro: inform about whole set
  - con: difficult to avoid losing signal
- not mutually exclusive
  - combine filter, aggregate
  - combine reduce, facet, change, derive





Idiom: **boxplot**

- static item aggregation
- task: find distribution
- data: table
- derived data
  - 5 quant attribs
    - median: central line
    - lower and upper quartile: boxes
    - lower upper fences: whiskers
      - values beyond which items are outliers
  - outliers beyond fence cutoffs explicitly shown



[40 years of boxplots. Wickham and Stryjewski. 2012. had.co.nz]

Idiom: **Dimensionality reduction for documents**

- attribute aggregation
  - derive low-dimensional target space from high-dimensional measured space

Task 1

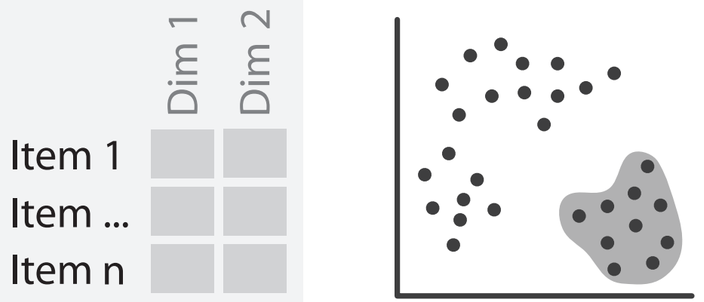
In
HD data

Out
2D data

What?
- In High-dimensional data
- Out 2D data

Why?
- Produce
- Derive

Task 2



In
2D data

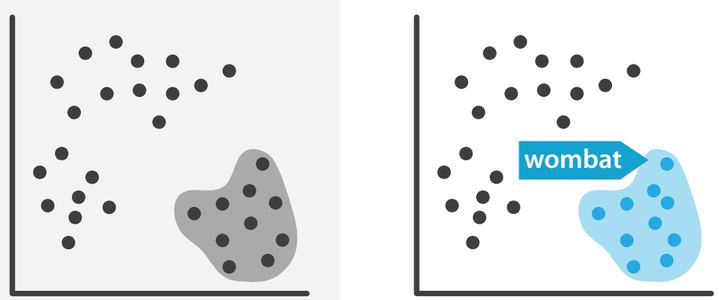
Out
Scatterplot
Clusters & points

What?
- In 2D data
- Out Scatterplot
- Out Clusters & points

Why?
- Discover
- Explore
- Identify

How?
- Encode
- Navigate
- Select

Task 3



In
Scatterplot
Clusters & points

Out
Labels for clusters

What?
- In Scatterplot
- In Clusters & points
- Out Labels for clusters

Why?
- Produce
- Annotate

What?

Datasets | Attributes

- Data Types
  - Items
- Data and D
  - Tables
    - Items
    - Attributes
- Dataset Typ
  - Tables
  - Multidim
  - Geometr

Why?

Actions

- Analyze
  - Consume
    - Discover
    - Present
    - Enjoy
  - Produce
    - Annotate
  - Search
  - Query
    - Identify

Targets

- All Data
  - Trends
  - Outliers
  - Features

How?

Encode

- Arrange
  - Express
  - Separate
  - Order
  - Align
  - Use
- Map
  from categorical and ordered attributes
  - Color
    - Hue
    - Saturation
    - Luminance
  - Size, Angle, Curvature, ...
  - Shape
  - Motion
    Direction, Rate, Frequency, ...

Manipulate

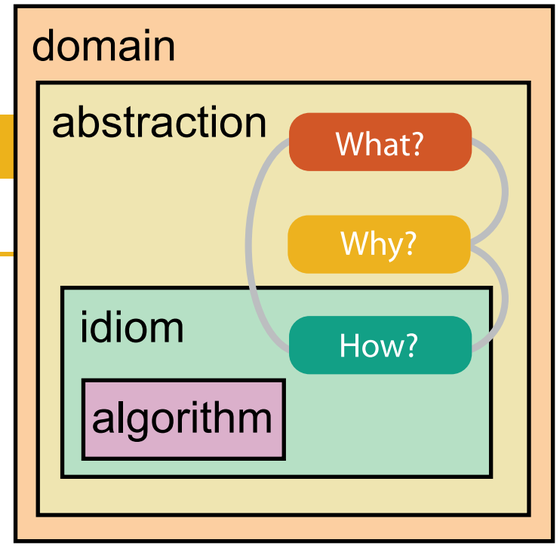
- Change
- Select
- Navigate

Facet

- Juxtapose
- Partition
- Superimpose

Reduce

- Filter
- Aggregate
- Embed



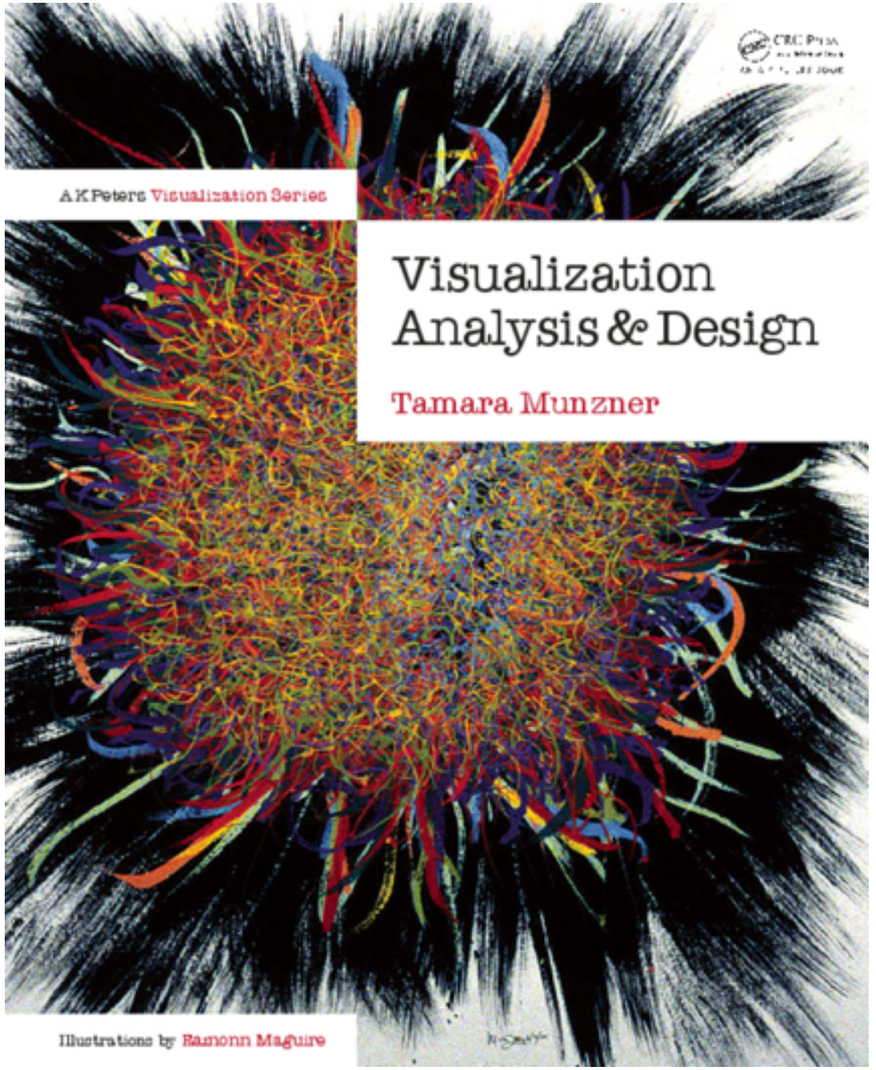
More Information

@tamaramunzner

- this talk
  http://www.cs.ubc.ca/~tmm/talks.html#vad15d3

- book page (including tutorial lecture slides)
  http://www.cs.ubc.ca/~tmm/vadbook
  - 20% promo code for book+ebook combo: HVN17
  - http://www.crcpress.com/product/isbn/9781466508910
  - illustrations: Eamonn Maguire

- papers, videos, software, talks, full courses
  http://www.cs.ubc.ca/group/infovis
  http://www.cs.ubc.ca/~tmm



Visualization Analysis and Design.
Munzner. A K Peters Visualization Series, CRC Press, Visualization Series, 2014.