Lectures 1&2:
Manipulate & Interact

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DSCI 532, Data Visualization 2
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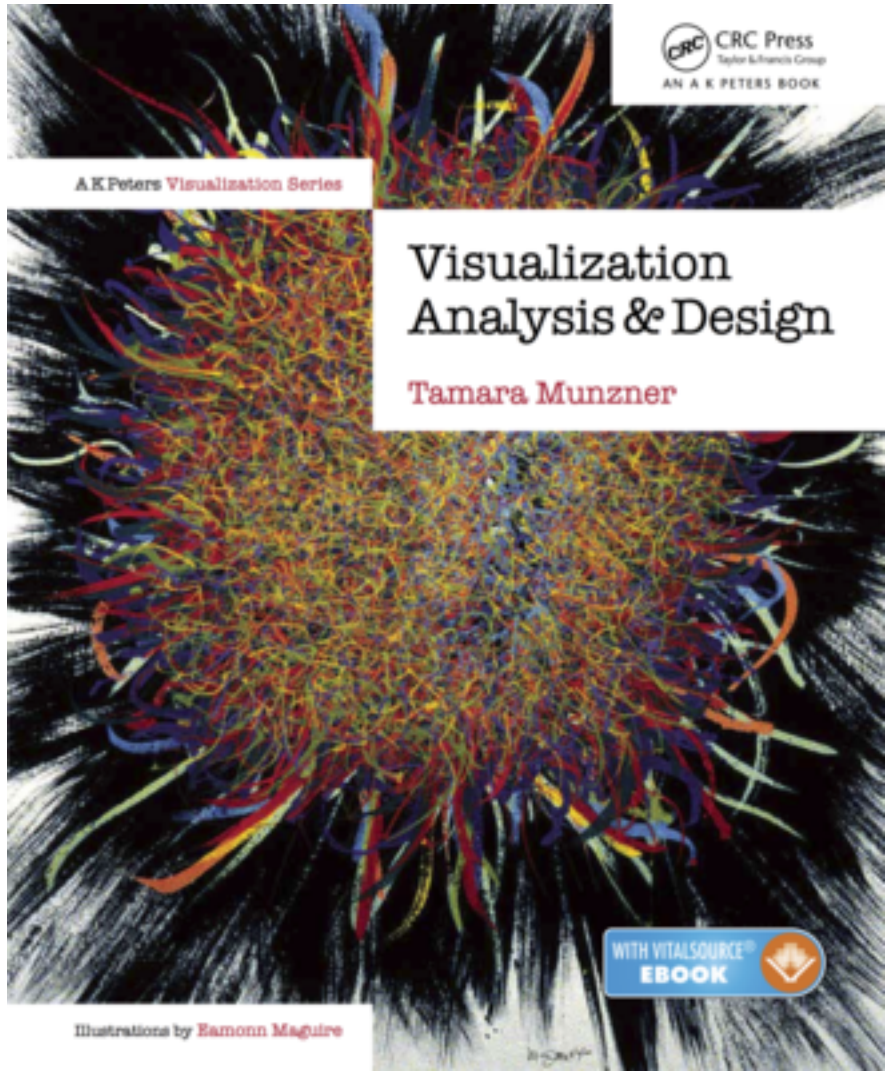


www.cs.ubc.ca/~tmm/courses/mds-viz2-17

@tamaramunzner

Visualization (vis) defined & motivated

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

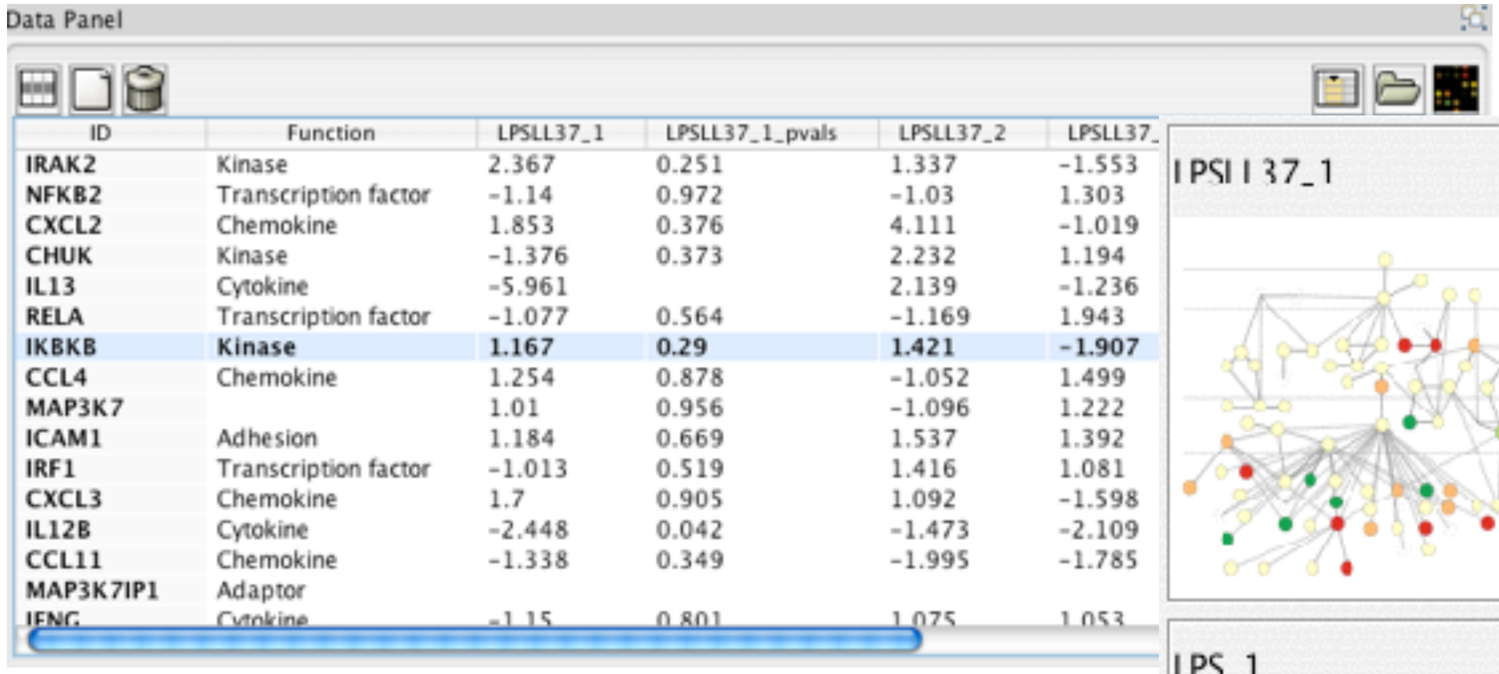
Visualization is suitable when there is a need to augment human capabilities rather than replace people with computational decision-making methods.

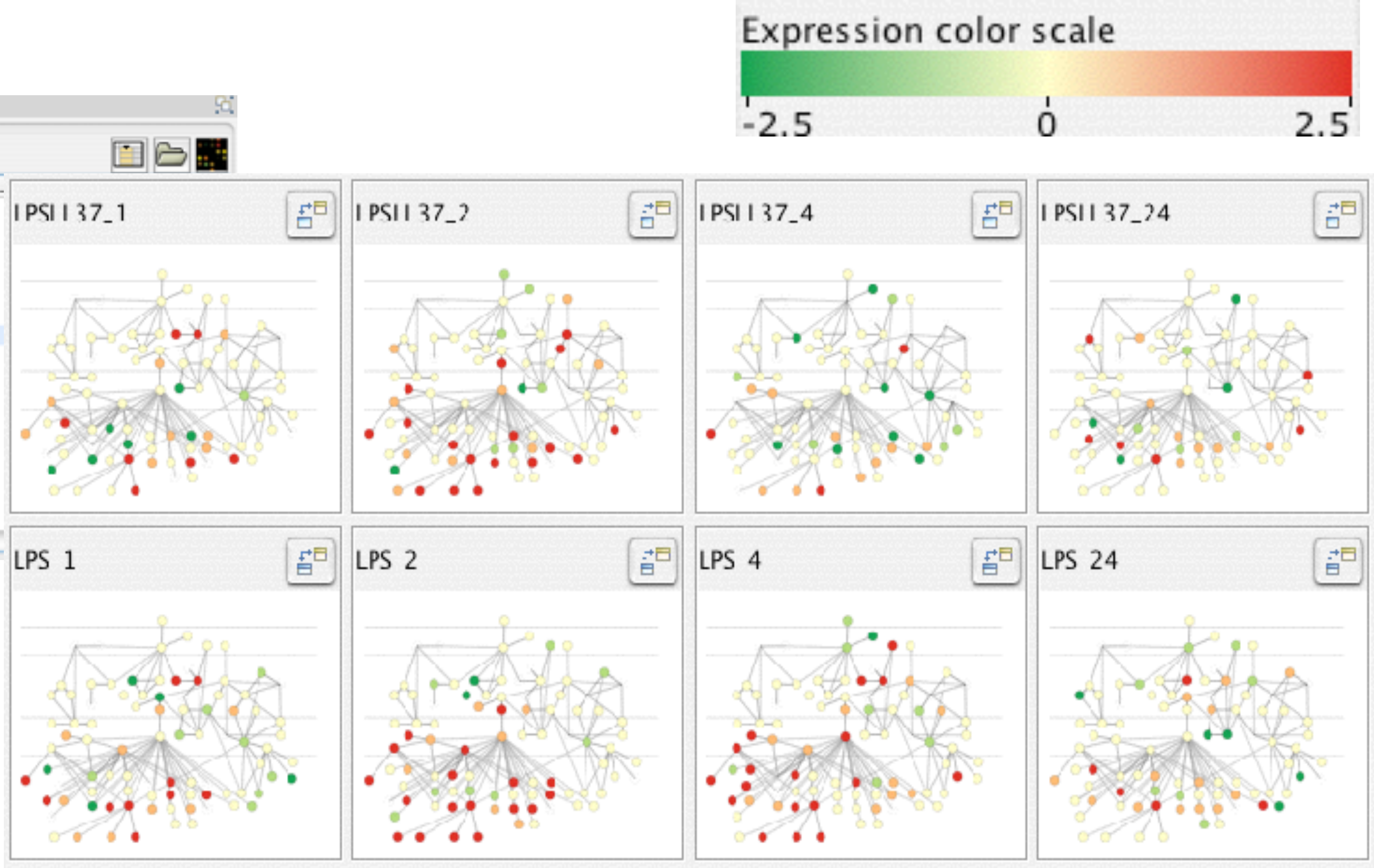
- human in the loop needs the details & no trusted automatic solution exists
  - doesn't know exactly what questions to ask in advance
  - exploratory data analysis
    - *speed up* through human-in-the-loop visual data analysis
  - present known results to others
  - stepping stone towards automation
    - before model creation to provide understanding
    - during algorithm creation to refine, debug, set parameters
    - before or during deployment to build trust and monitor

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.]

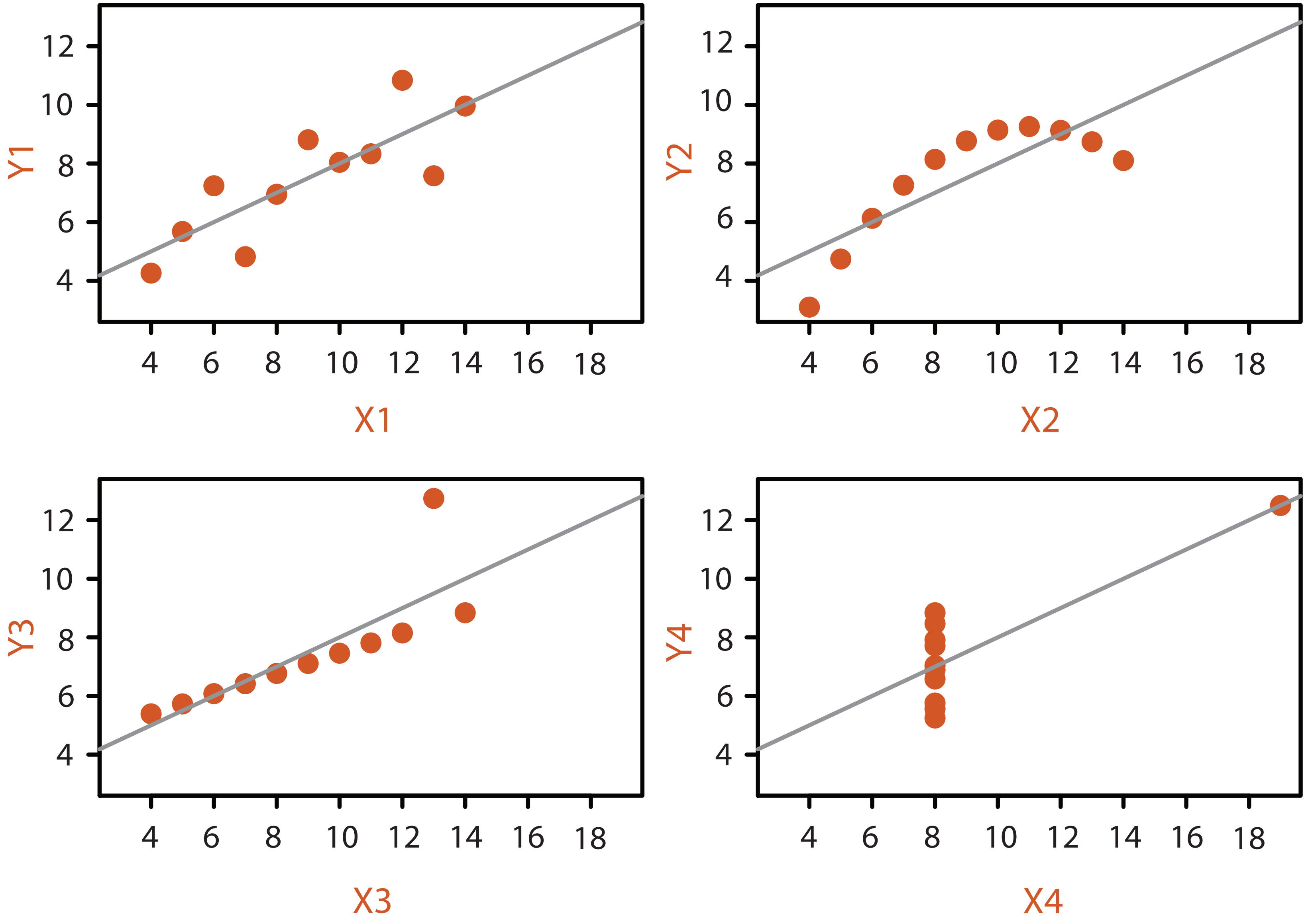
Why represent all the data?

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	7.5
y variance	3.75
x/y correlation	0.816



https://www.youtube.com/watch?v=DbJyPELmhJc

Same Stats, Different Graphs

Why focus on tasks and effectiveness?

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

- effectiveness requires match between data/task and representation
  - set of representations is huge
  - many are ineffective mismatch for specific data/task combo
  - increases chance of finding good solutions if you understand full space of possibilities
- what counts as effective?
  - novel: enable entirely new kinds of analysis
  - faster: speed up existing workflows
- how to validate effectiveness
  - many methods, must pick appropriate one for your context

What resource limitations are we faced with?

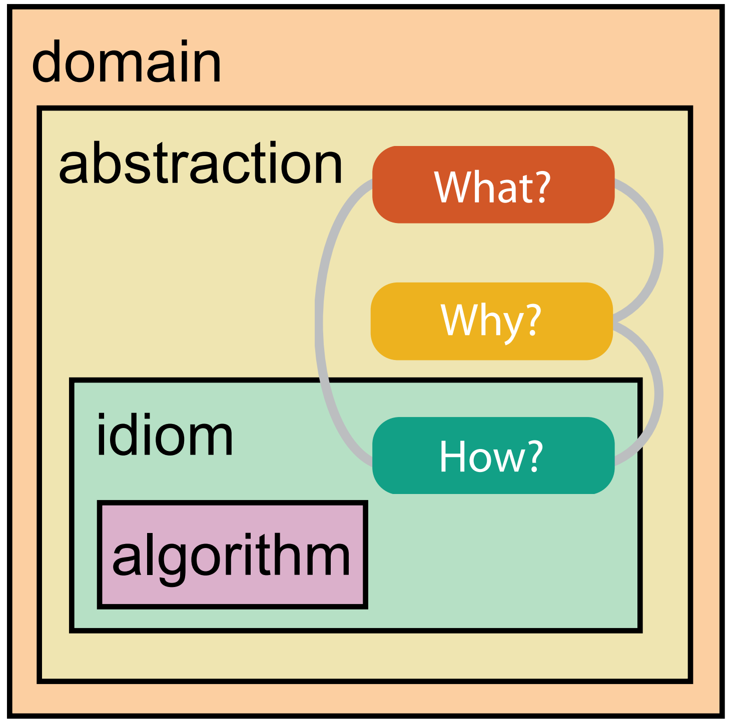
Vis designers must take into account three very different kinds of resource limitations: those of computers, of humans, and of displays.

- computational limits
  - processing time
  - system memory
- human limits
  - human attention and memory
- display limits
  - pixels are precious resource, the most constrained resource
  - **information density**: ratio of space used to encode info vs unused whitespace
    - tradeoff between clutter and wasting space, find sweet spot between dense and sparse

Nested model: Four levels of vis design

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

- *domain situation*
  - who are the target users?
- *abstraction*
  - translate from specifics of domain to vocabulary of vis
    - what is shown? **data** abstraction
    - 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



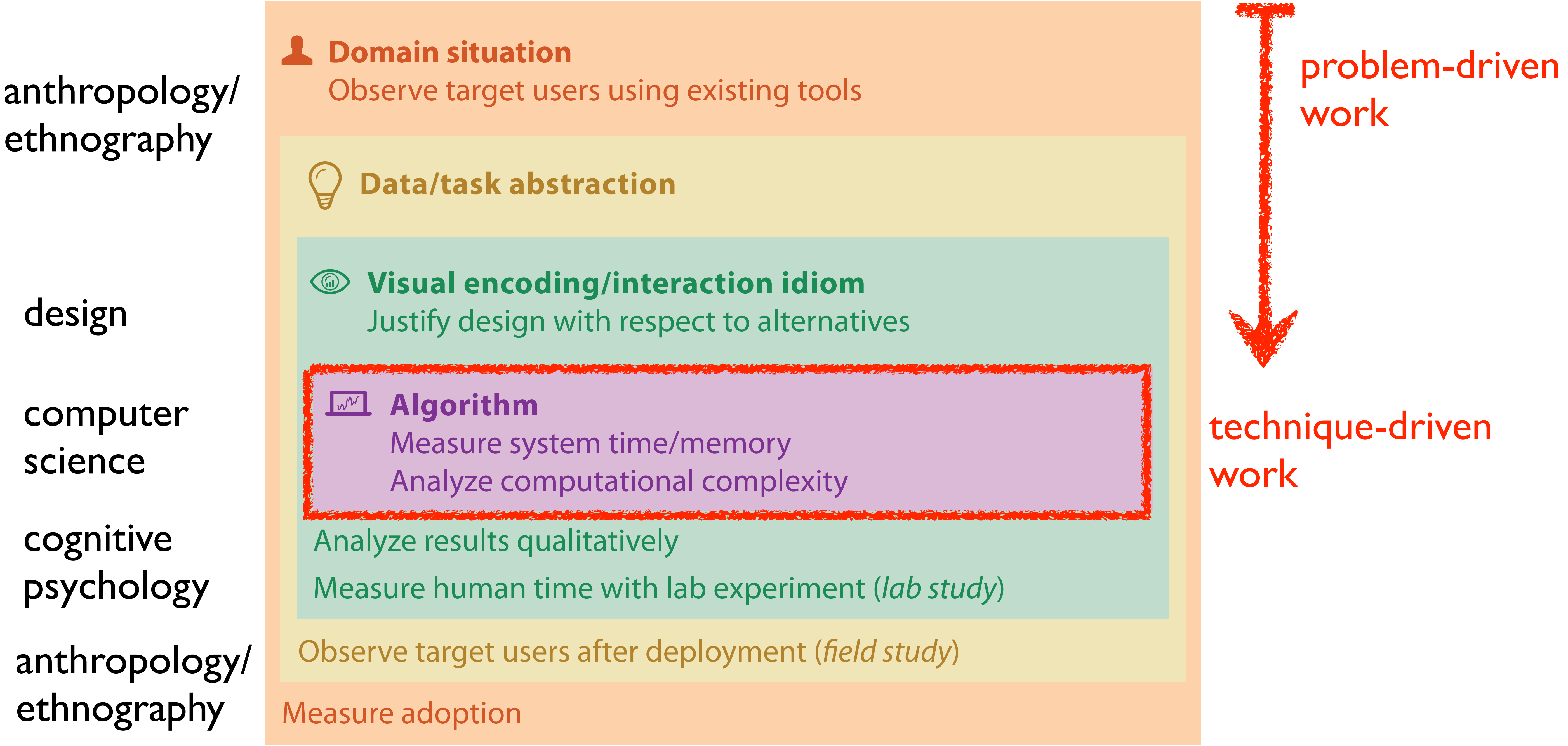
[A Multi-Level Typology of Abstract Visualization Tasks *Brehmer and Munzner. IEEE TVCG 19(12):2376-2385, 2013 (Proc. InfoVis 2013).*]

Why is validation difficult?

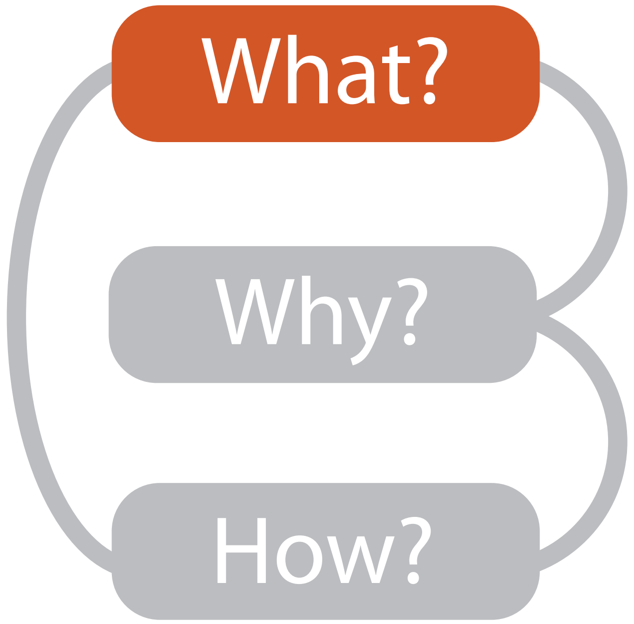
- different ways to get it wrong at each level

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).]



What?

Datasets

Data Types

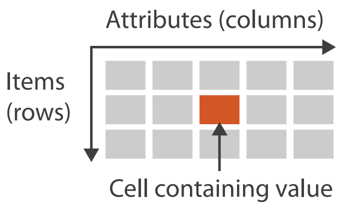
- Items
- Attributes
- Links
- Positions
- Grids

Data and Dataset Types

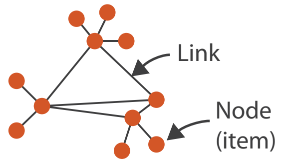
Tables	Networks & Trees	Fields	Geometry	Clusters, Sets, Lists
Items	Items (nodes)	Grids	Items	Items
Attributes	Links	Positions	Positions	
	Attributes	Attributes		

Dataset Types

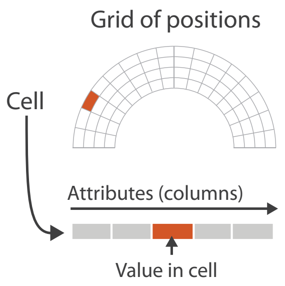
- Tables



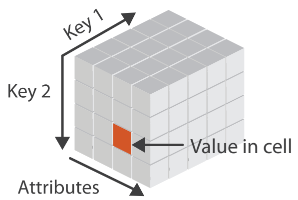
- Networks



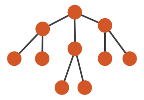
- Fields (Continuous)



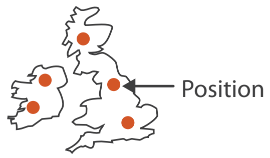
- *Multidimensional Table*



- *Trees*



- Geometry (Spatial)



Dataset Availability

- Static

- Dynamic

Attributes

Attribute Types

- Categorical

- Ordered
  - *Ordinal*

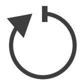
  - *Quantitative*

Ordering Direction

- Sequential

- Diverging

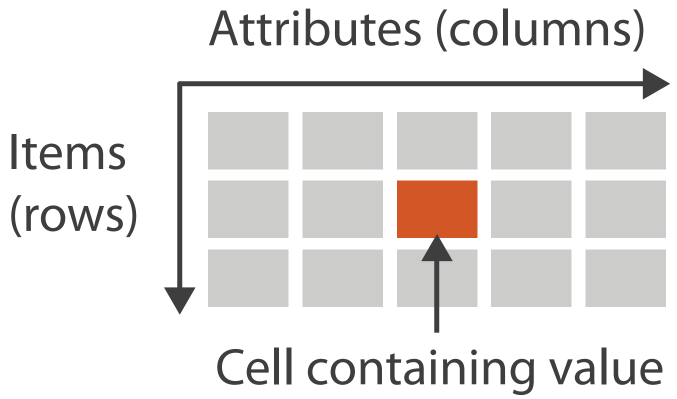
- Cyclic



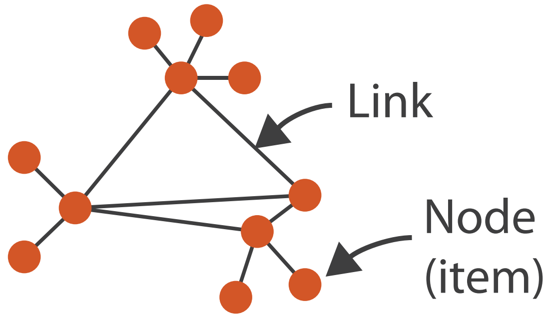
Types: Datasets and data

Dataset Types

→ Tables

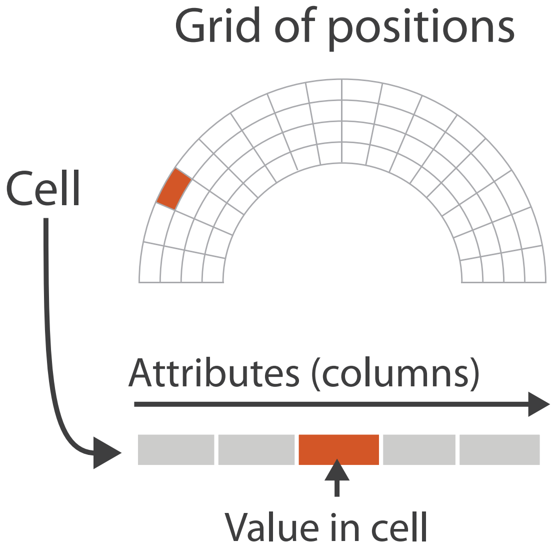


→ Networks

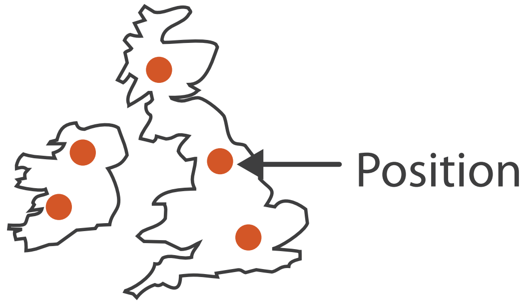


→ Spatial

→ Fields (Continuous)



→ Geometry (Spatial)

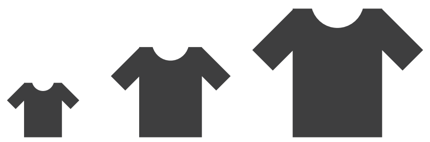


Attribute Types

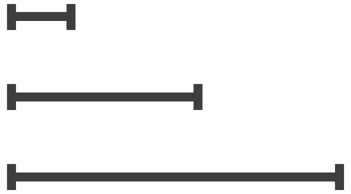
→ Categorical

→ Ordered

→ *Ordinal*



→ *Quantitative*

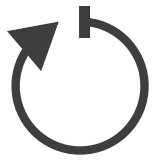


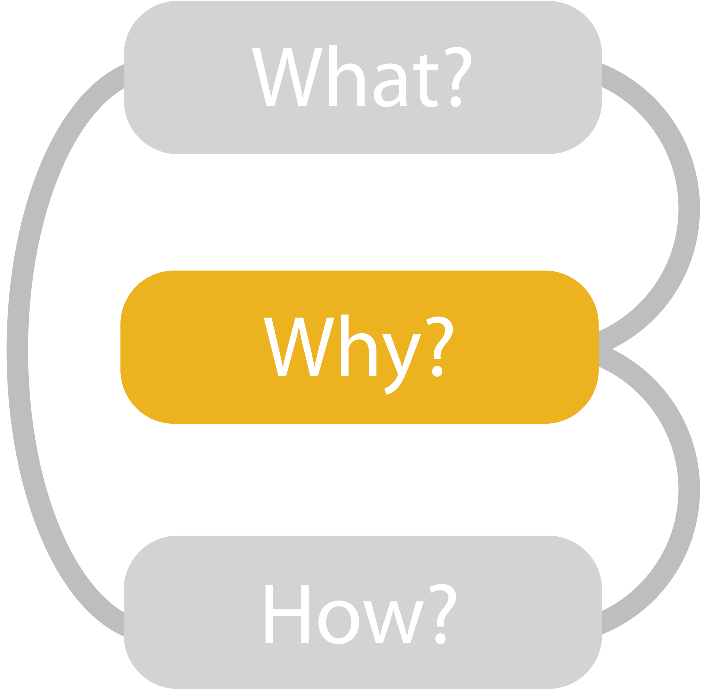
Ordering Direction

→ Sequential

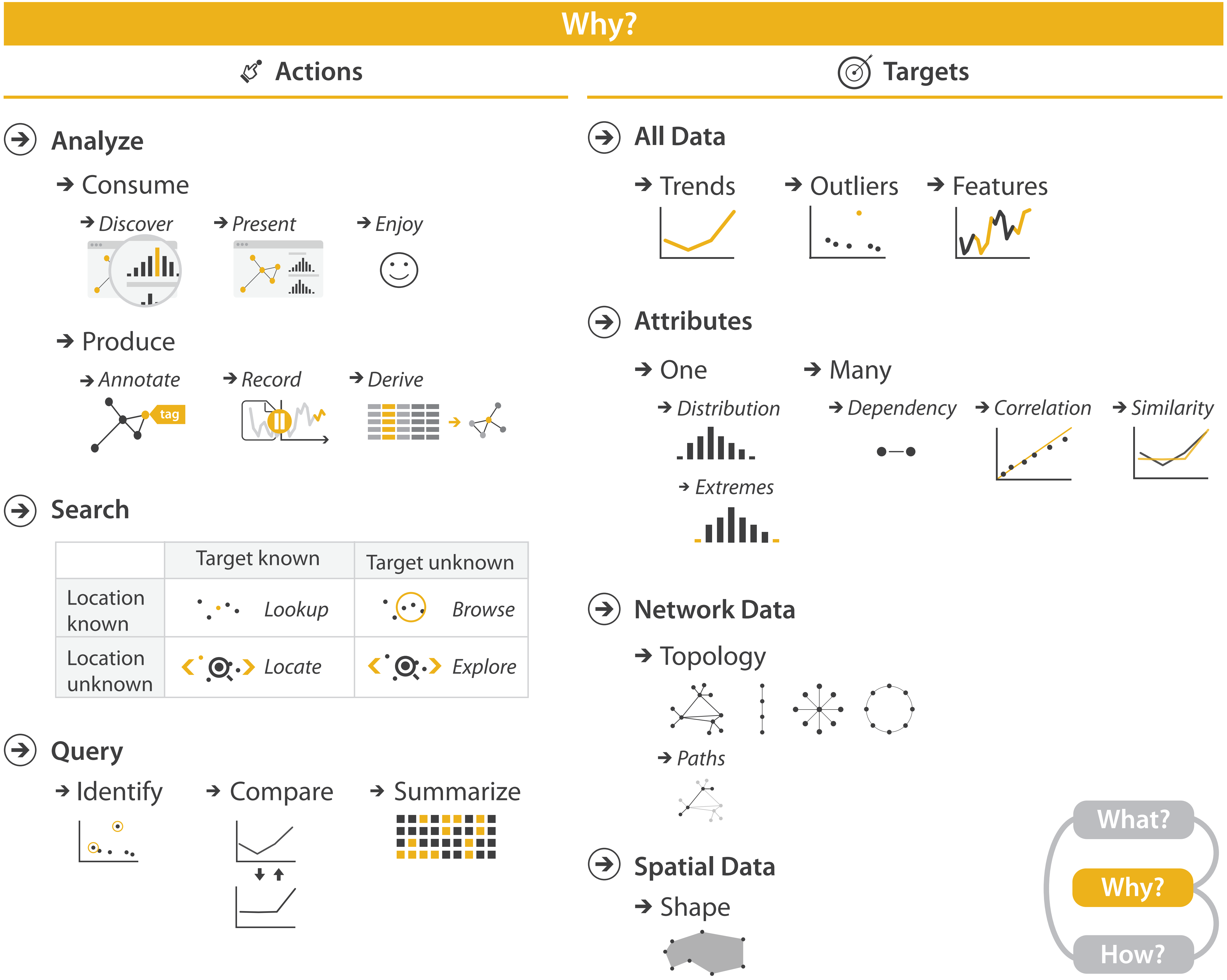
→ Diverging

→ Cyclic





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

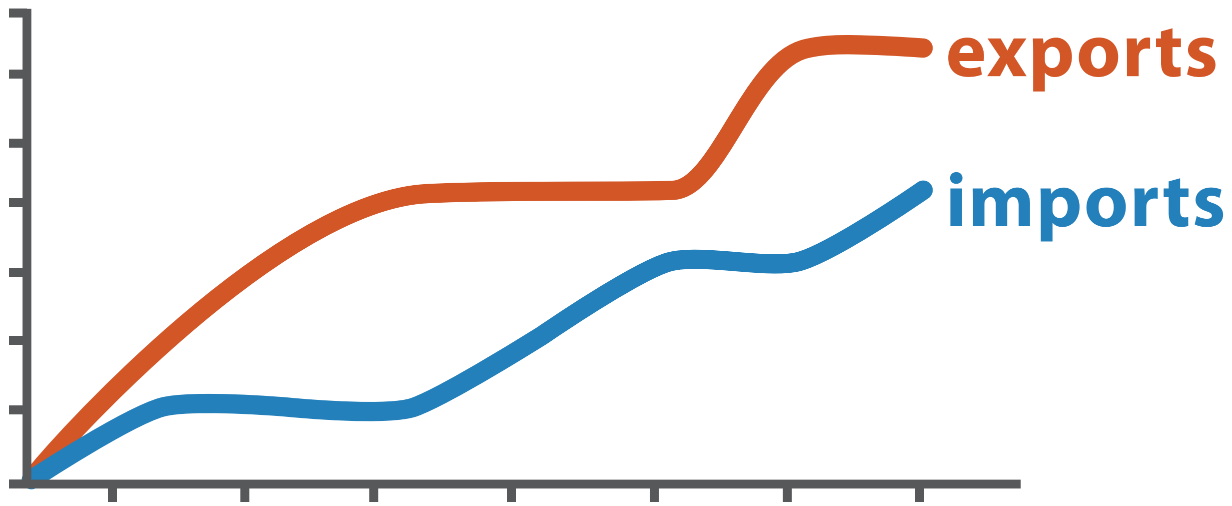


Actions: Analyze, Query

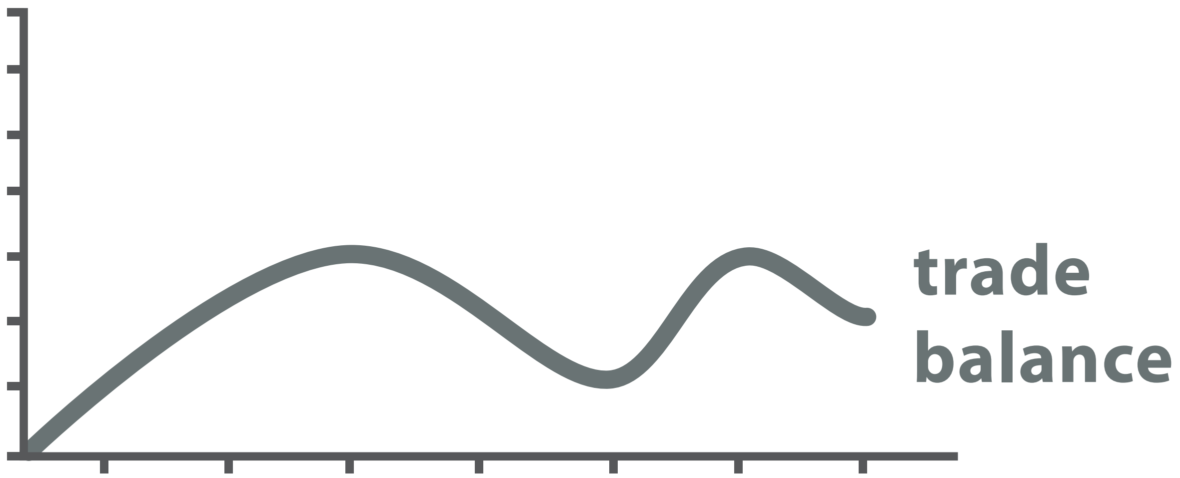
- analyze
  - consume
    - discover vs present
      - aka explore vs explain
    - enjoy
      - aka casual, social
  - produce
    - annotate, record, derive
- query
  - how much data matters?
    - one, some, all
- independent choices
  - analyze, query, (search)

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



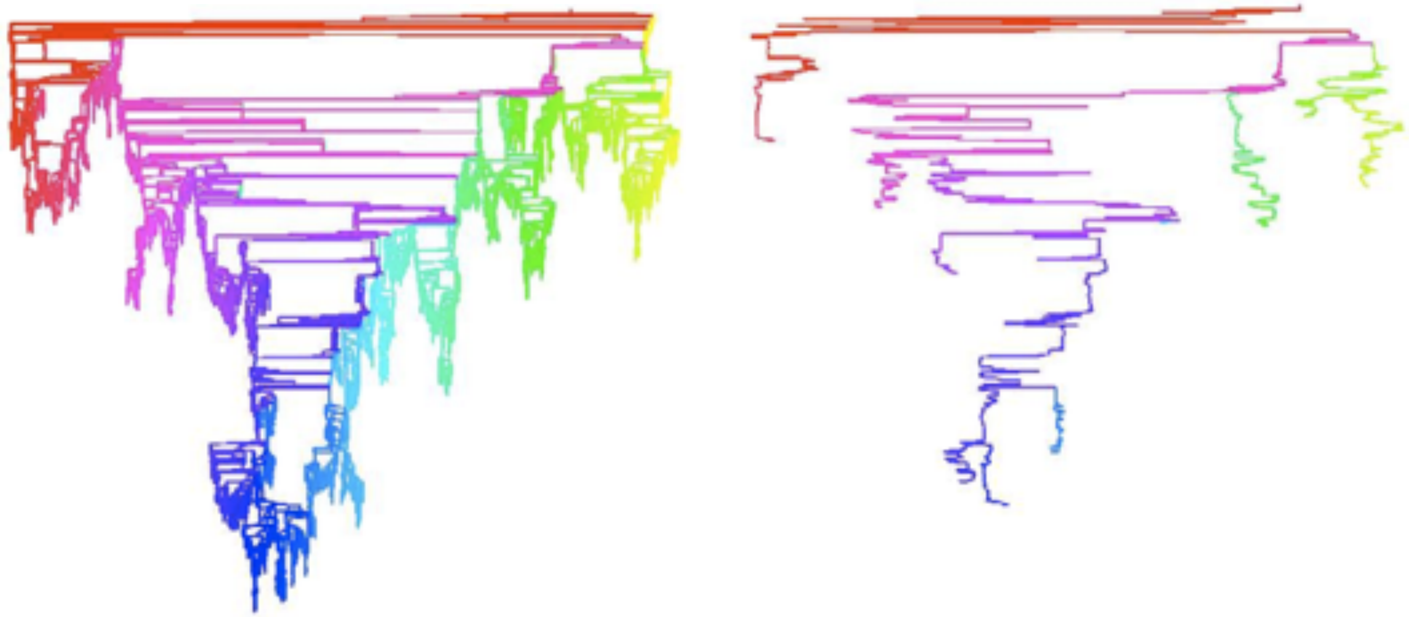
trade balance = exports − imports

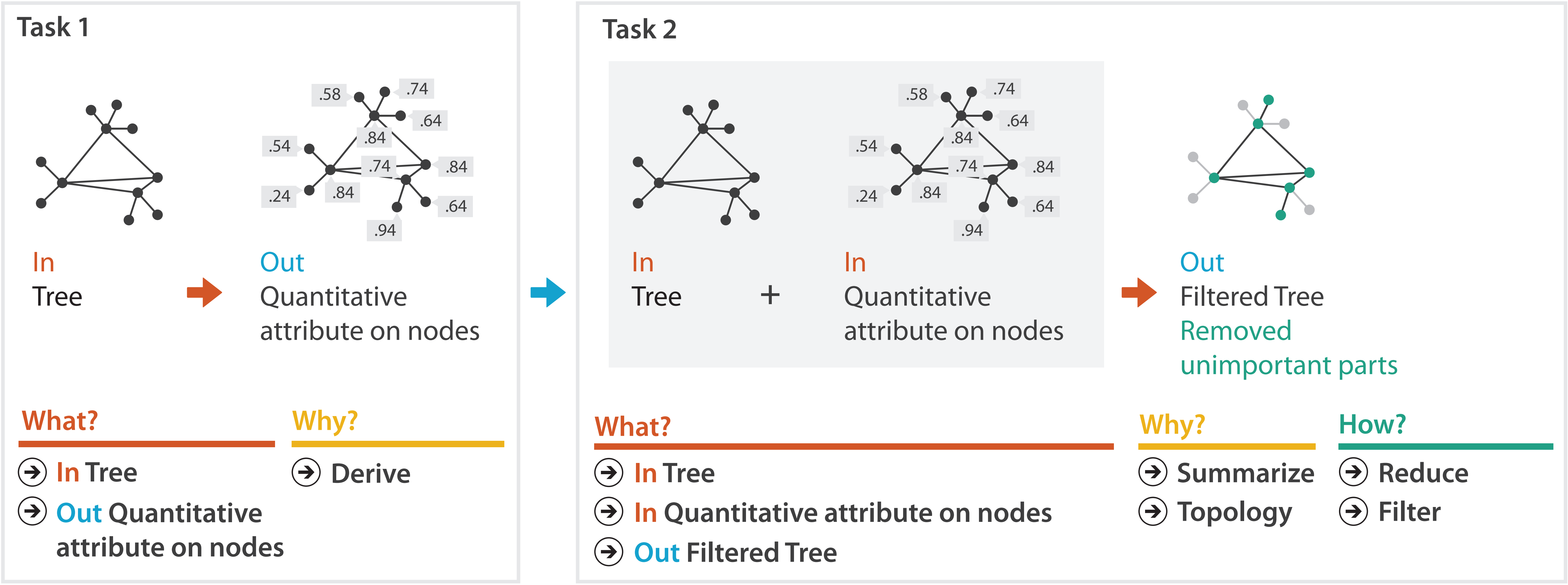
Derived Data

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.]

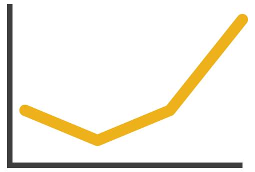




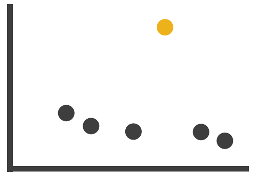
Why: Targets

➔ All Data

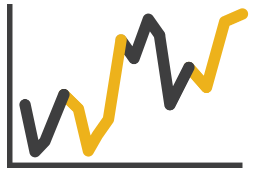
→ Trends



→ Outliers



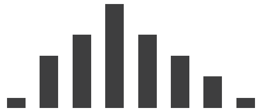
→ Features



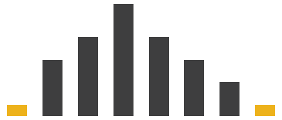
➔ Attributes

→ One

→ *Distribution*



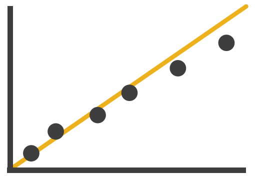
→ *Extremes*



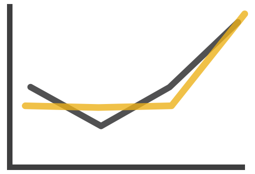
→ Many

→ *Dependency*

→ *Correlation*

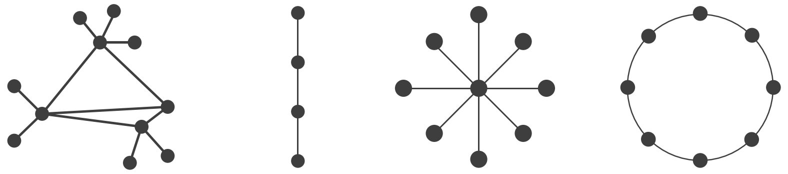


→ *Similarity*

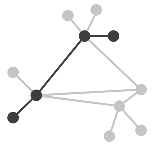


➔ Network Data

→ Topology

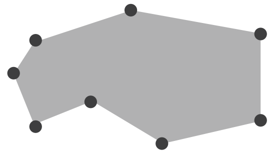


→ *Paths*



➔ 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

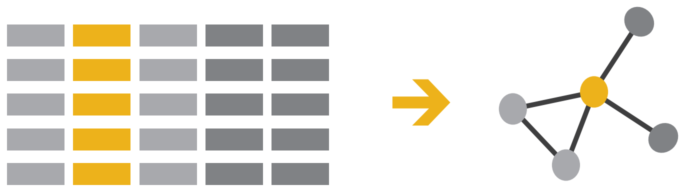
What?

Why?

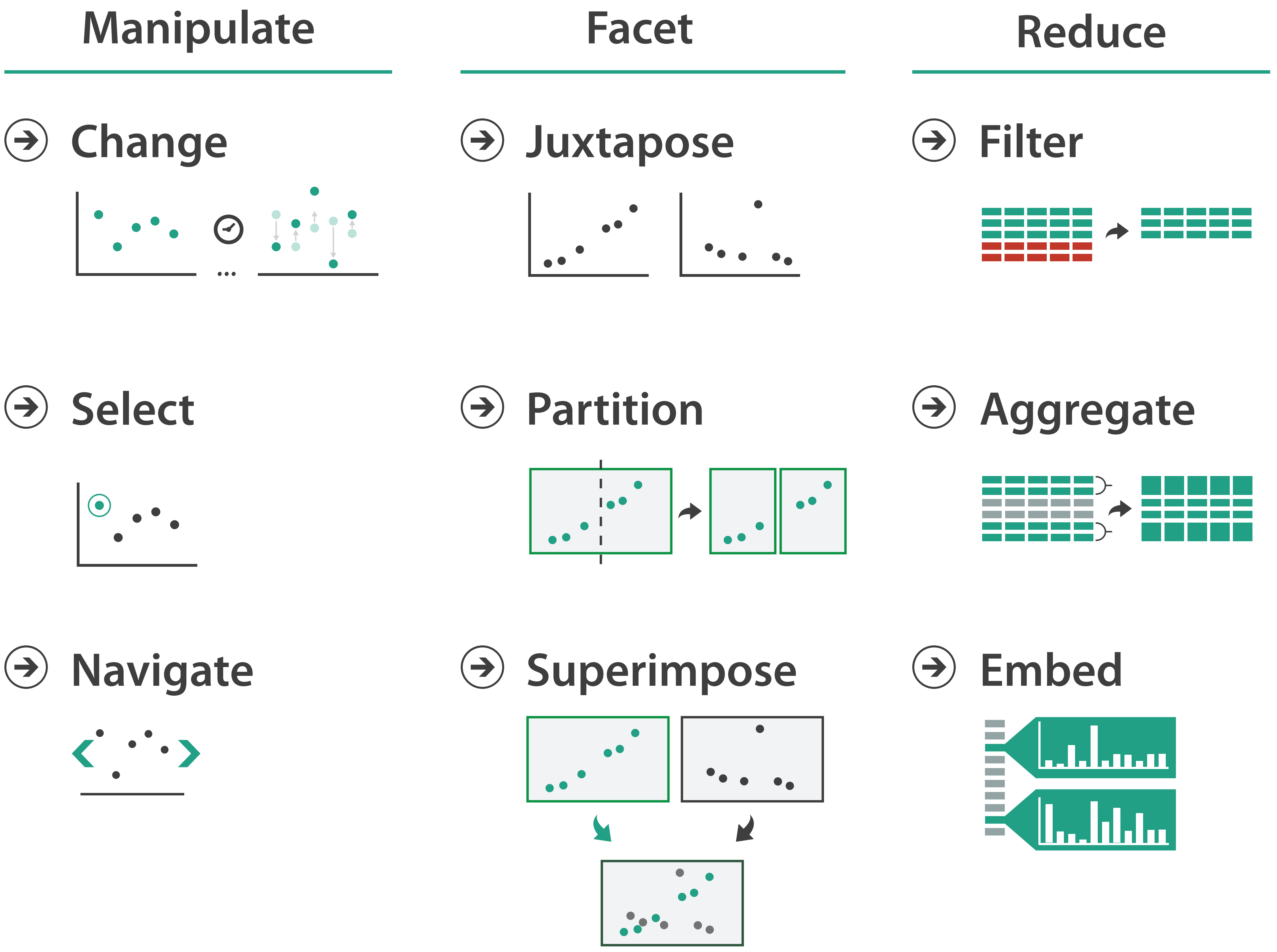
How?

How to handle complexity: 1 previous strategy + 3 more

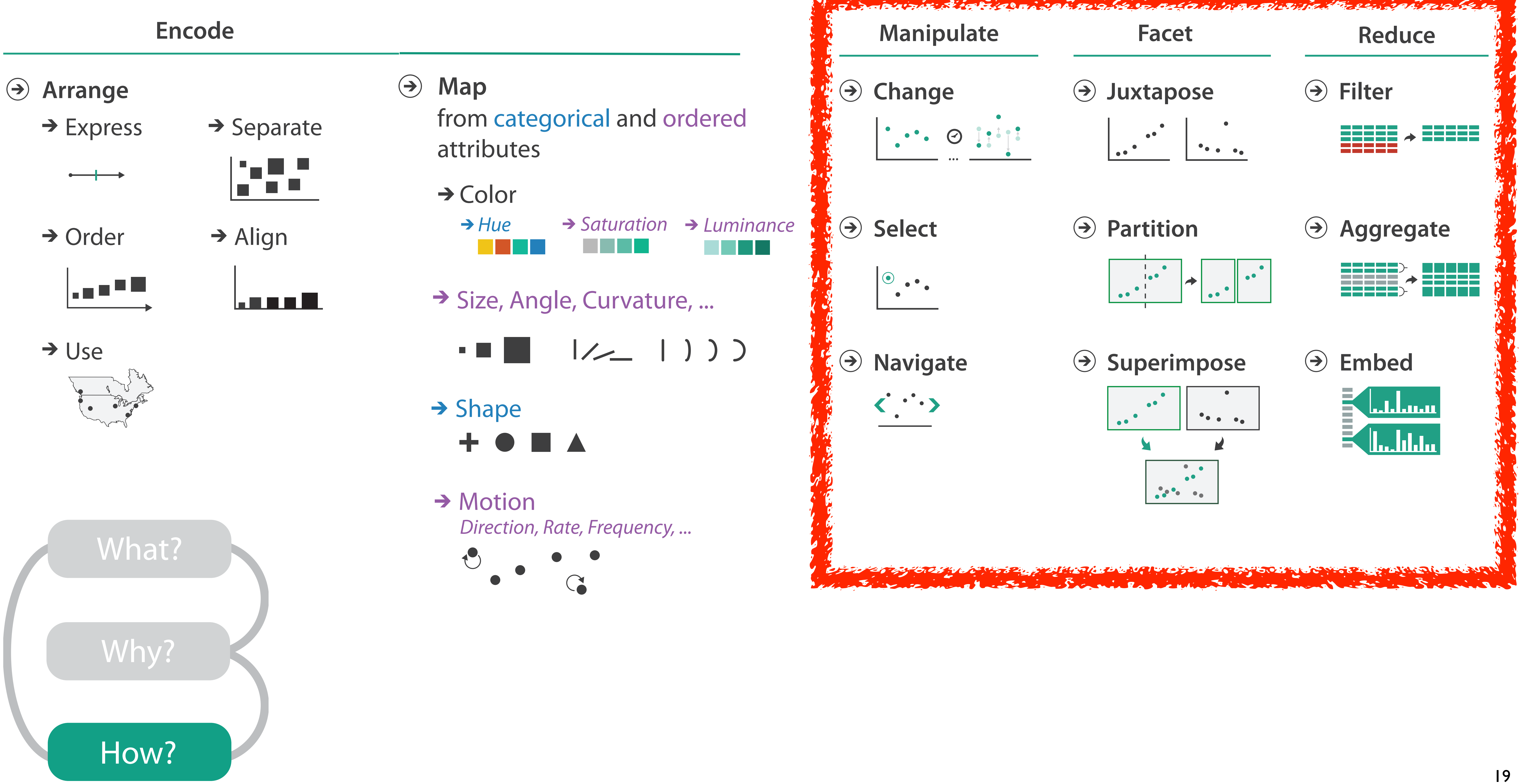
→ *Derive*



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



How?


Encode
Arrange
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Separate
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from categorical and ordered attributes
Color
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Luminance
Size, Angle, Curvature, ...
Shape
Motion
Direction, Rate, Frequency, ...
Manipulate
Change
Select
Navigate
Facet
Juxtapose
Partition
Superimpose
Reduce
Filter
Aggregate
Embed
What?
Why?
How?

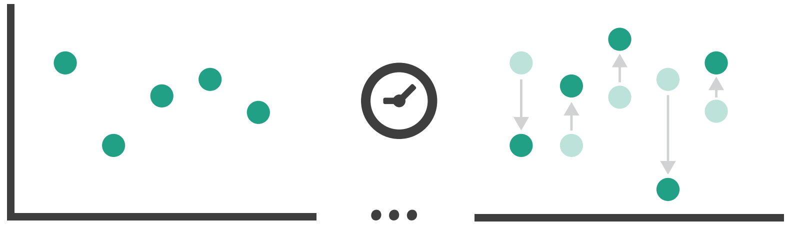
Further reading

- Visualization Analysis and Design. Munzner. AK Peters Visualization Series, CRC Press, 2014.
  - *Chap 1: What's Vis and Why Do It?*
  - *Chap 2: What: Data Abstraction*
  - *Chap 3: Why: Task Abstraction*
  - *Chap 4: Analysis: Four Levels for Validation*
- *Low-Level Components of Analytic Activity in Information Visualization.* Amar, Eagan, and Stasko. Proc. IEEE InfoVis 2005, p 111–117.
- *A taxonomy of tools that support the fluent and flexible use of visualizations.* Heer and Shneiderman. Communications of the ACM 55:4 (2012), 45–54.
- Visualization of Time-Oriented Data. Aigner, Miksch, Schumann, and Tominski. Springer, 2011.

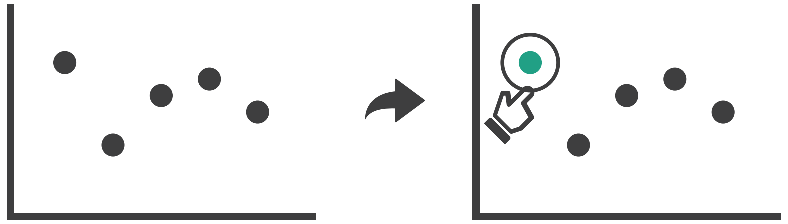
Manipulate / Interact

Manipulate

Change over Time



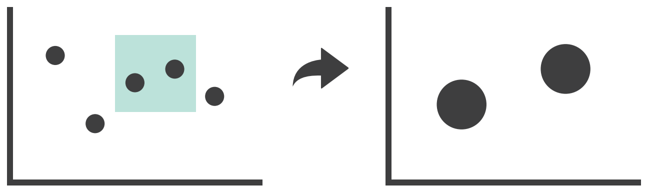
Select



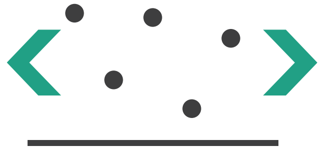
Navigate

Item Reduction

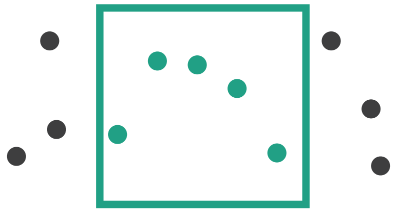
- *Zoom*
  Geometric or *Semantic*



- *Pan/Translate*



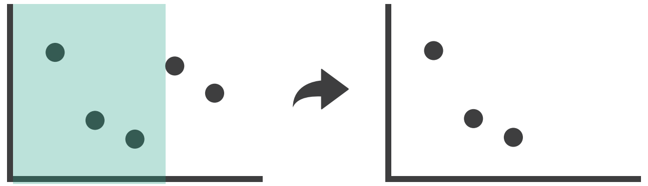
- *Constrained*



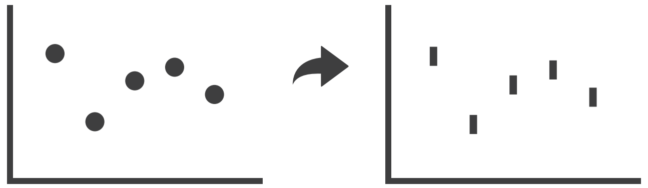
Attribute Reduction

- *Slice*

- *Cut*



- *Project*

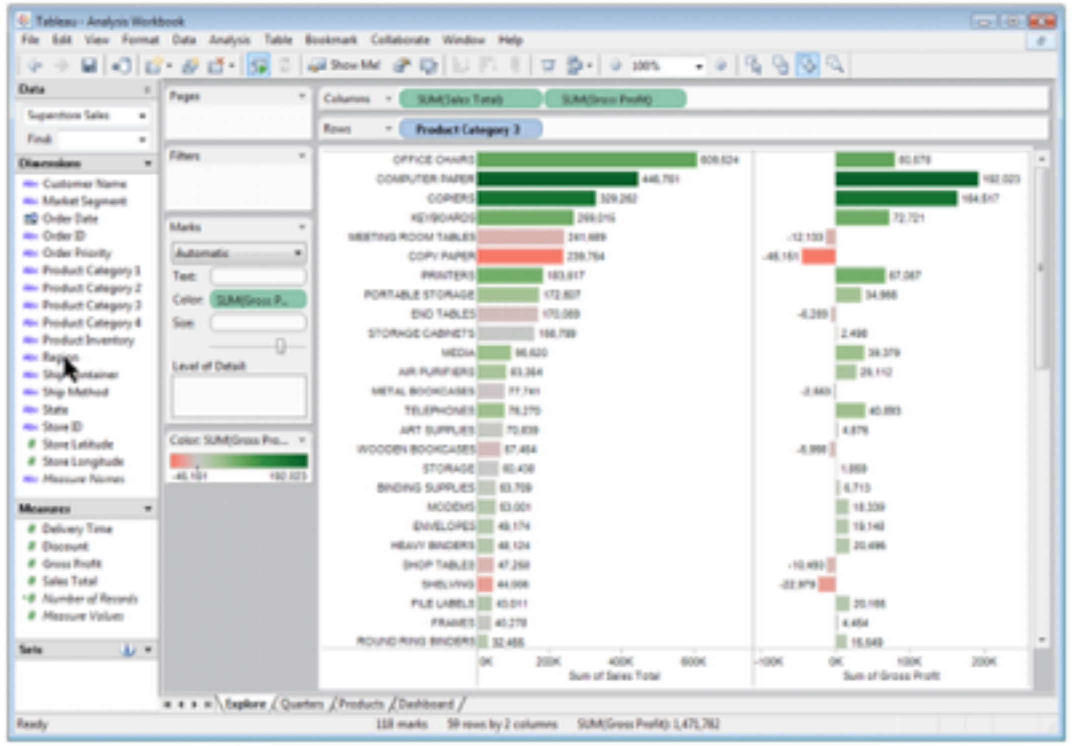


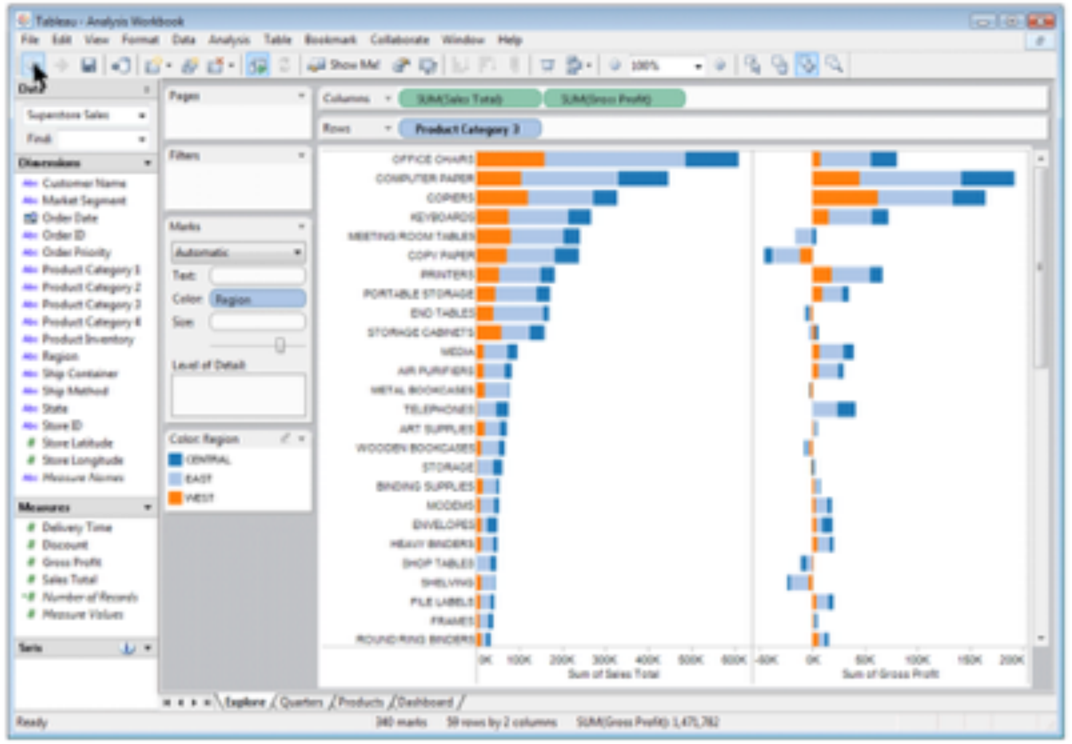
Change over time

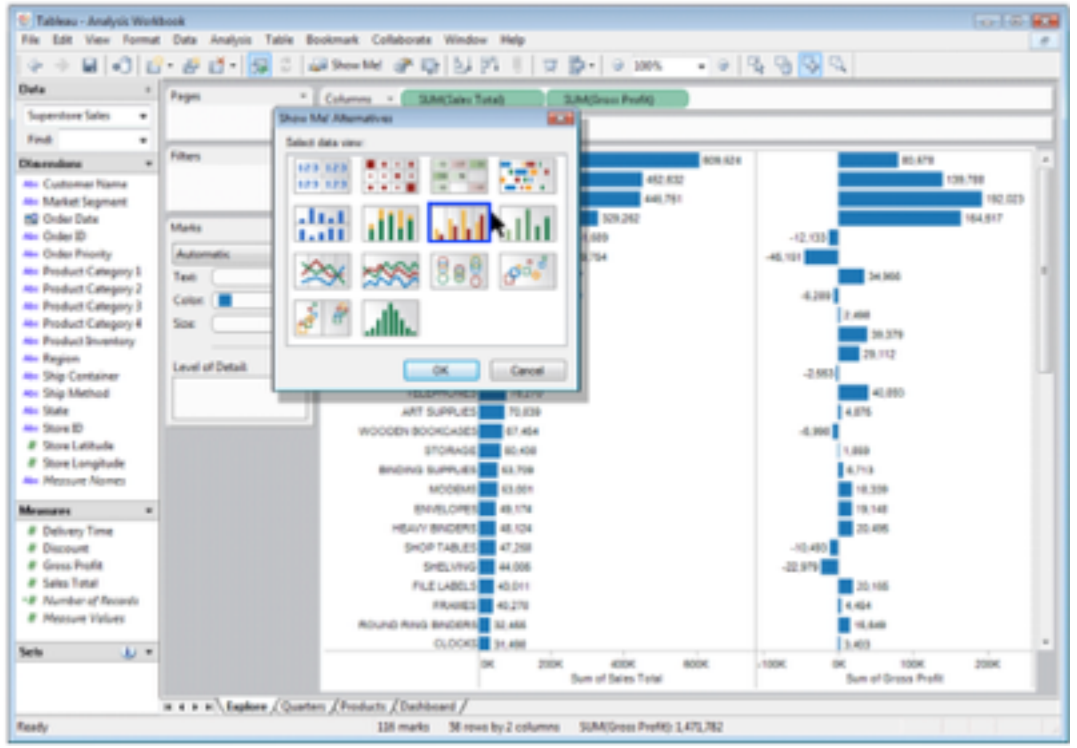
- change any of the other choices
  - encoding itself
  - parameters
  - arrange: rearrange, reorder
  - aggregation level, what is filtered...

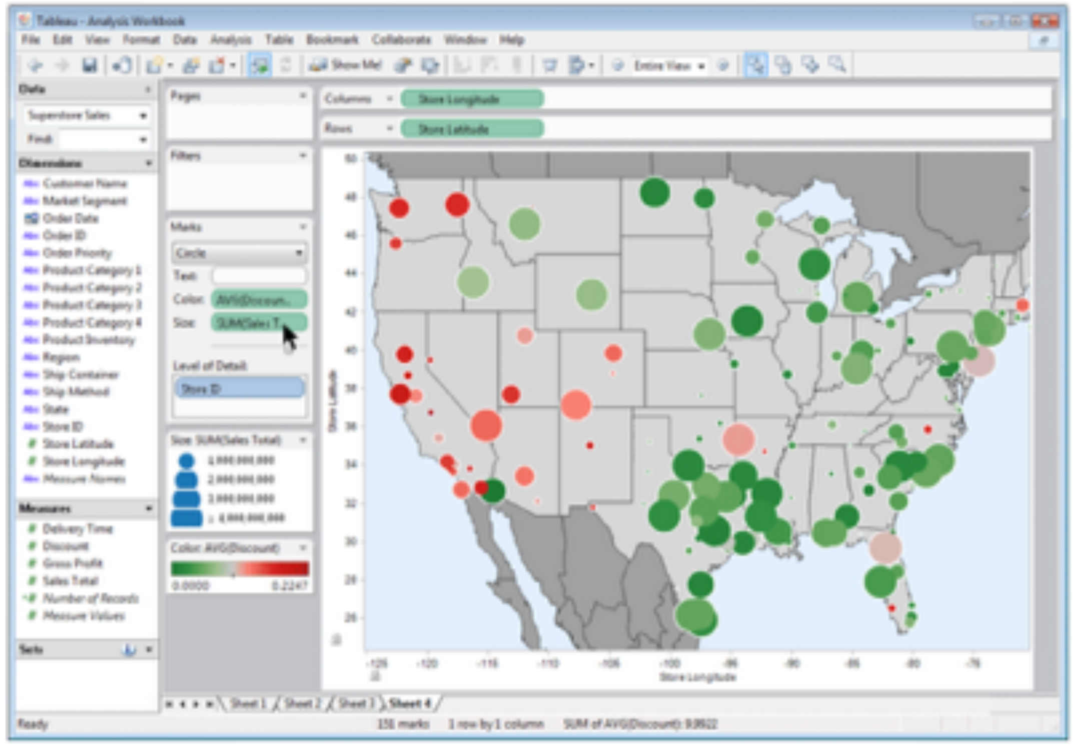
  - interaction entails change

Idiom: **Re-encode** System: **Tableau**





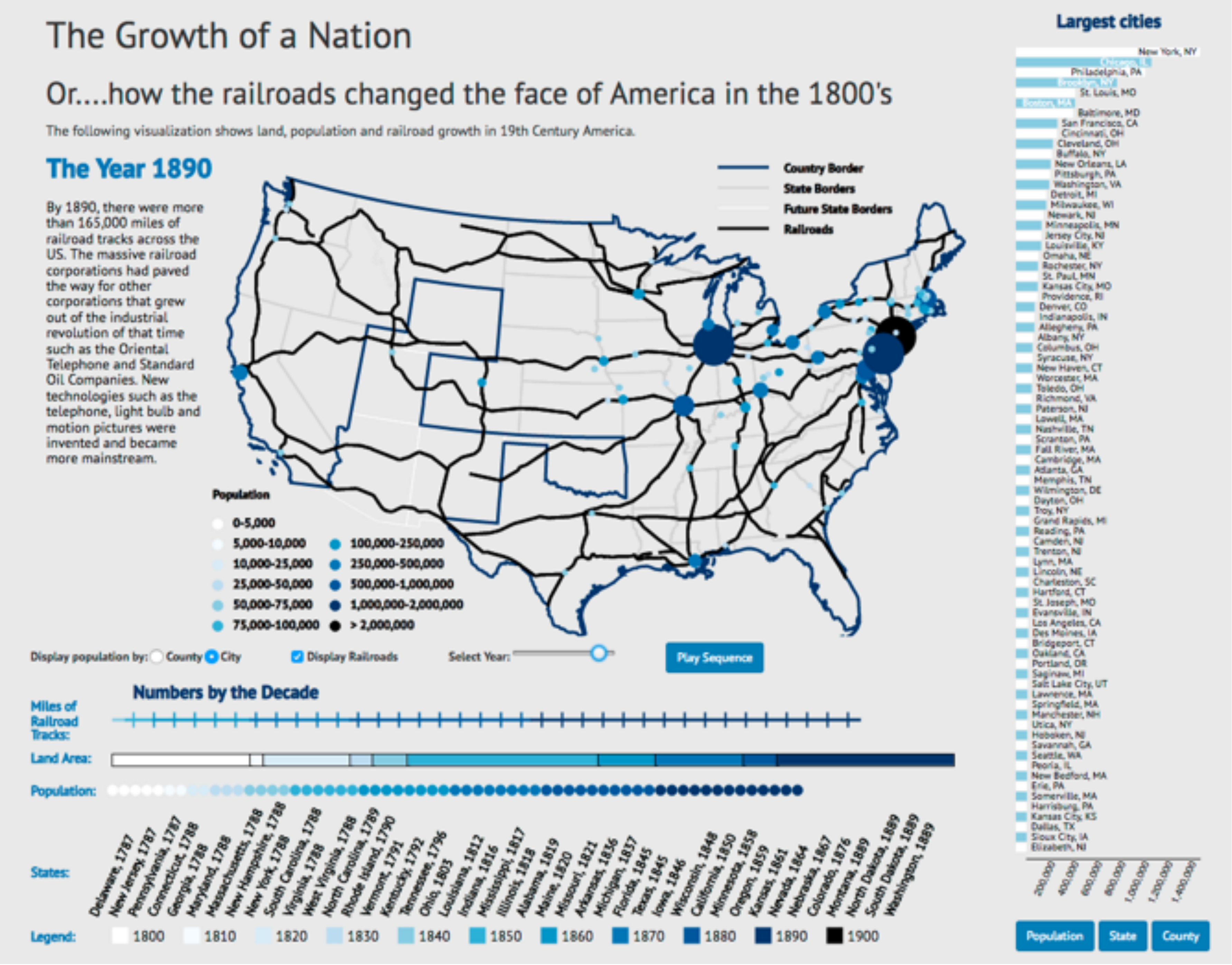




made using Tableau, http://tableausoftware.com

Idiom: **Change parameters**

- widgets and controls
  - sliders, buttons, radio buttons, checkboxes, dropdowns/comboboxes
- pros
  - clear affordances, self-documenting (with labels)
- cons
  - uses screen space
- design choices
  - separated vs interleaved
    - controls & canvas

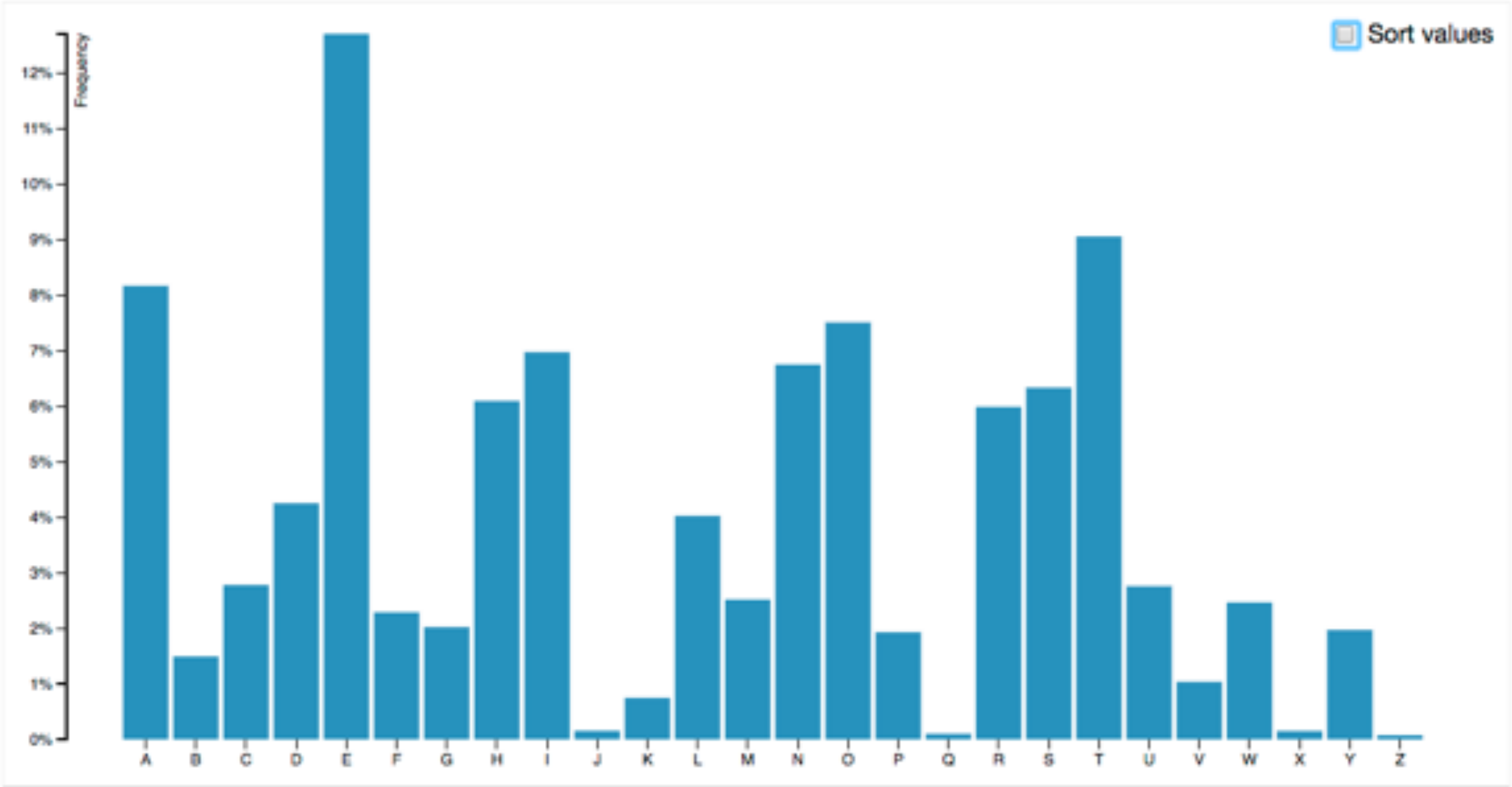


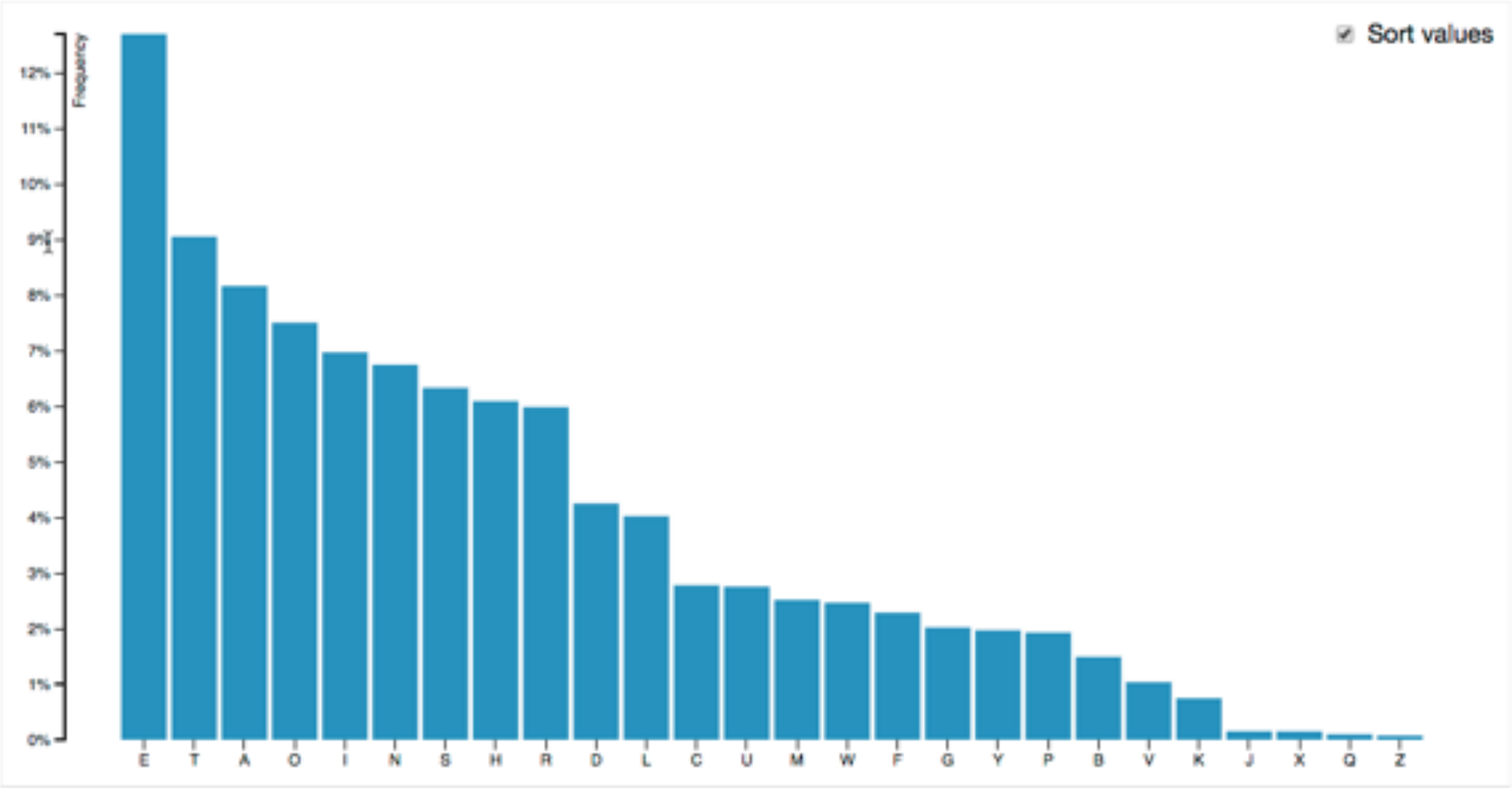
[Growth of a Nation](http://laurenwood.github.io/)

slide inspired by: Alexander Lex, Utah

Idiom: **Change order/arrangement**

- what: simple table
- how: data-driven reordering
- why: find extreme values, trends



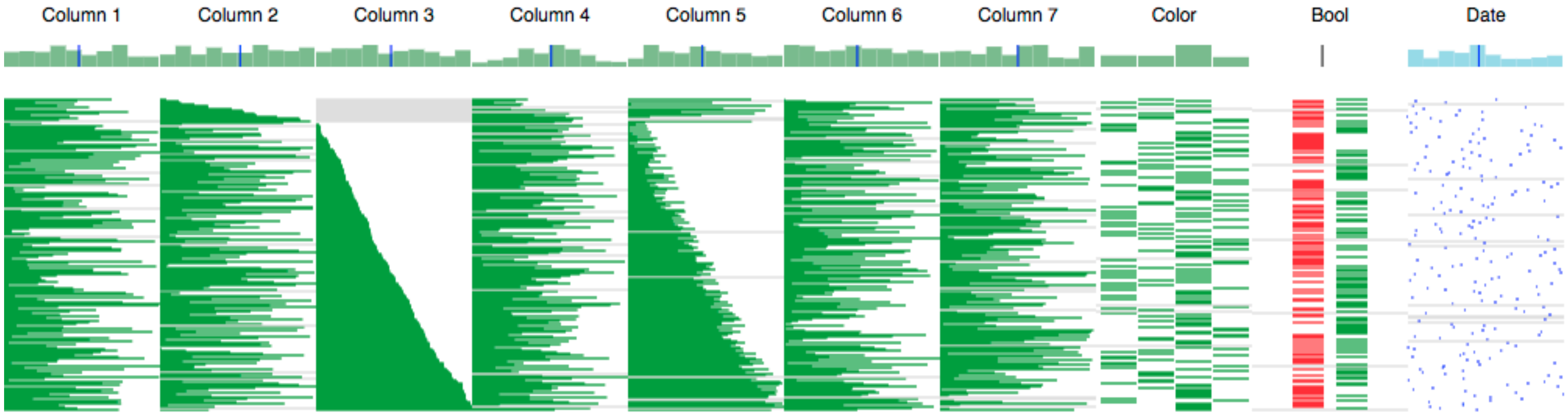


[Sortable Bar Chart](https://bl.ocks.org/mbostock/3885705)

Idiom: **Reorder**

System: **DataStripes**

- what: table with many attributes
- how: data-driven reordering by selecting column
- why: find correlations between attributes

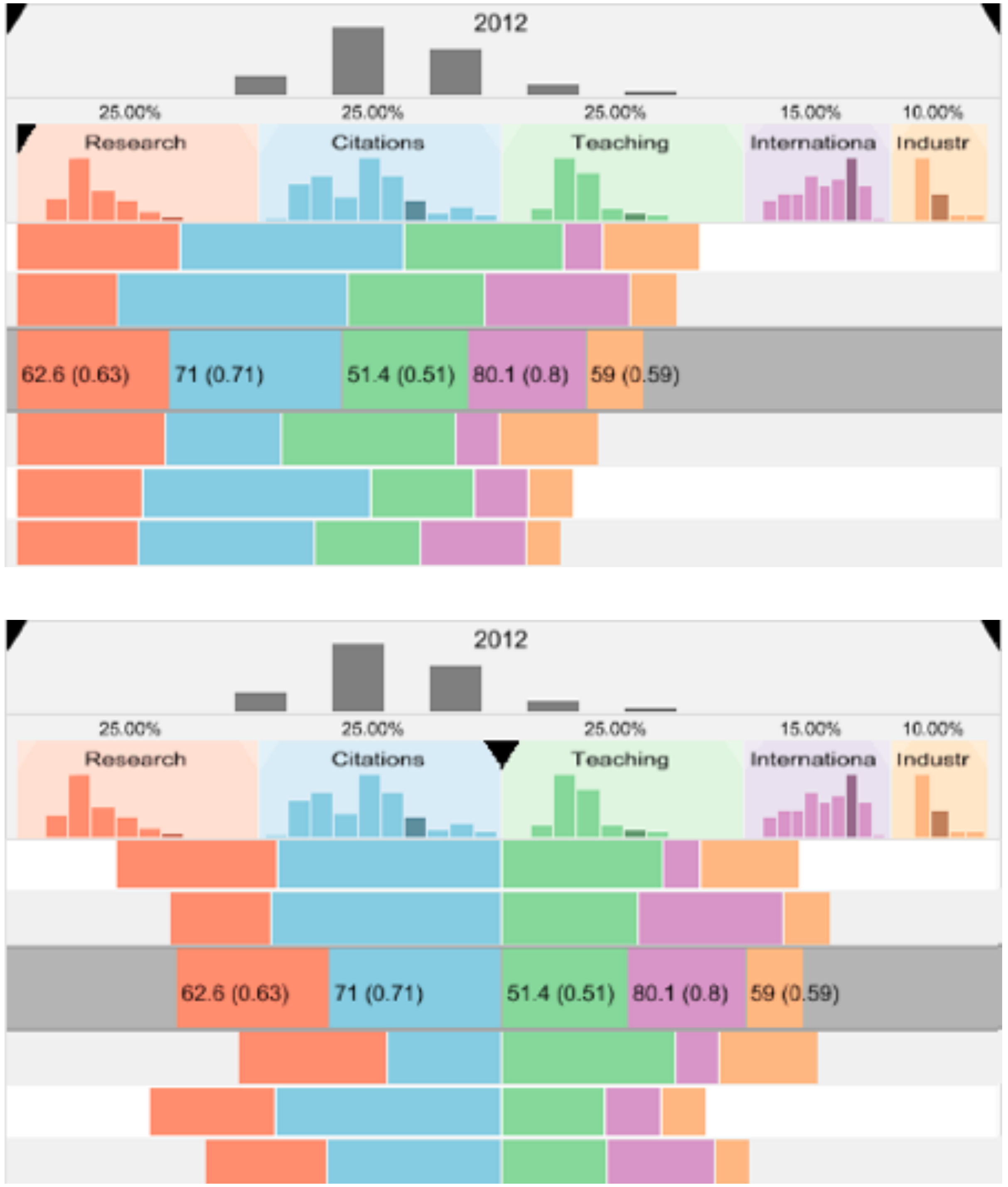


[*http://carlmanaster.github.io/datastripes/*]

Idiom: **Change alignment**

System: **LineUp**

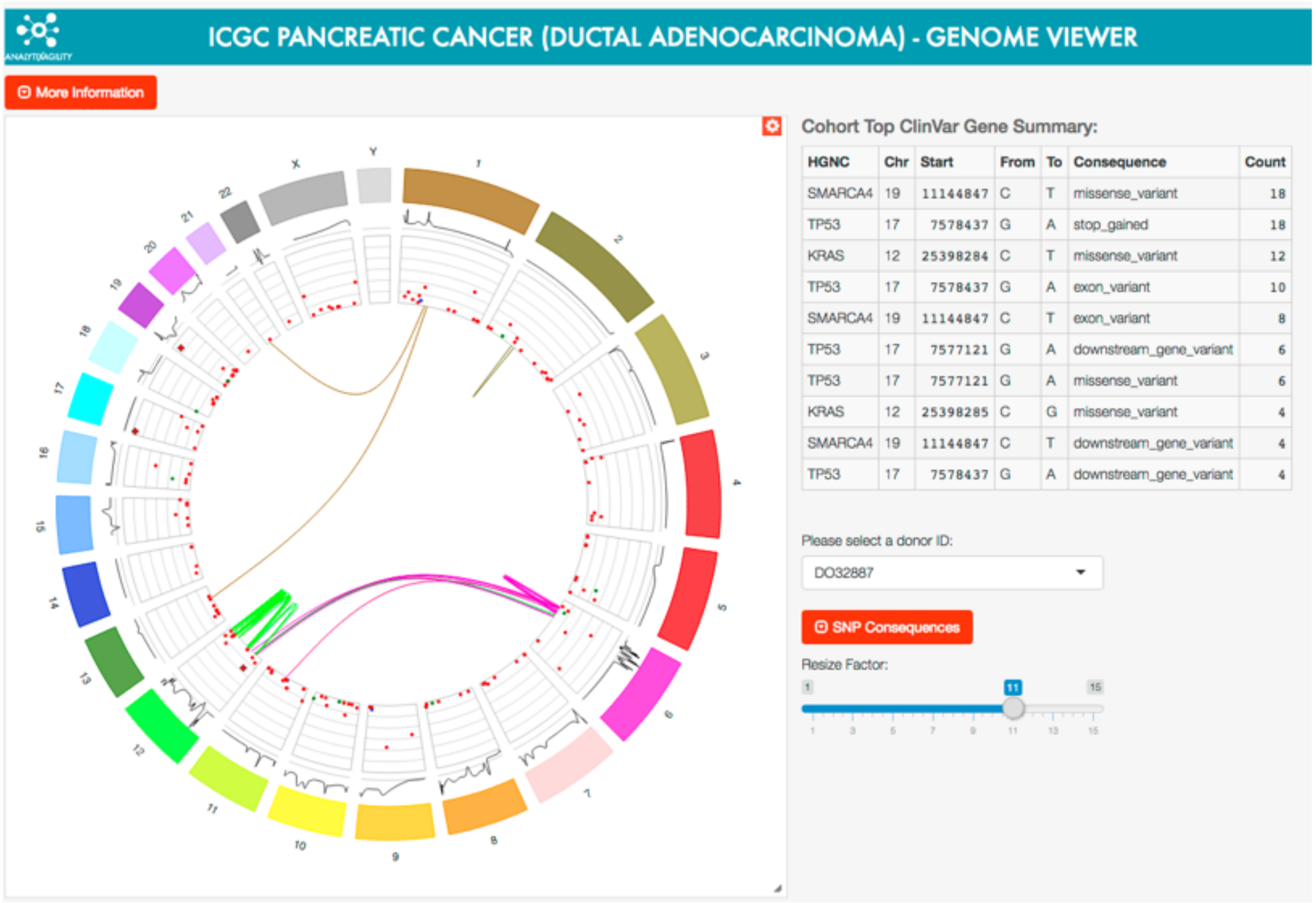
- stacked bars
  - easy to compare
    - first segment
    - total bar
- align to different segment
  - supports flexible comparison



[LineUp: Visual Analysis of Multi-Attribute Rankings. Gratzl, Lex, Gehlenborg, Pfister, and Streit. IEEE Trans. Visualization and Computer Graphics (Proc. InfoVis 2013) 19:12 (2013), 2277–2286.]

Shiny example

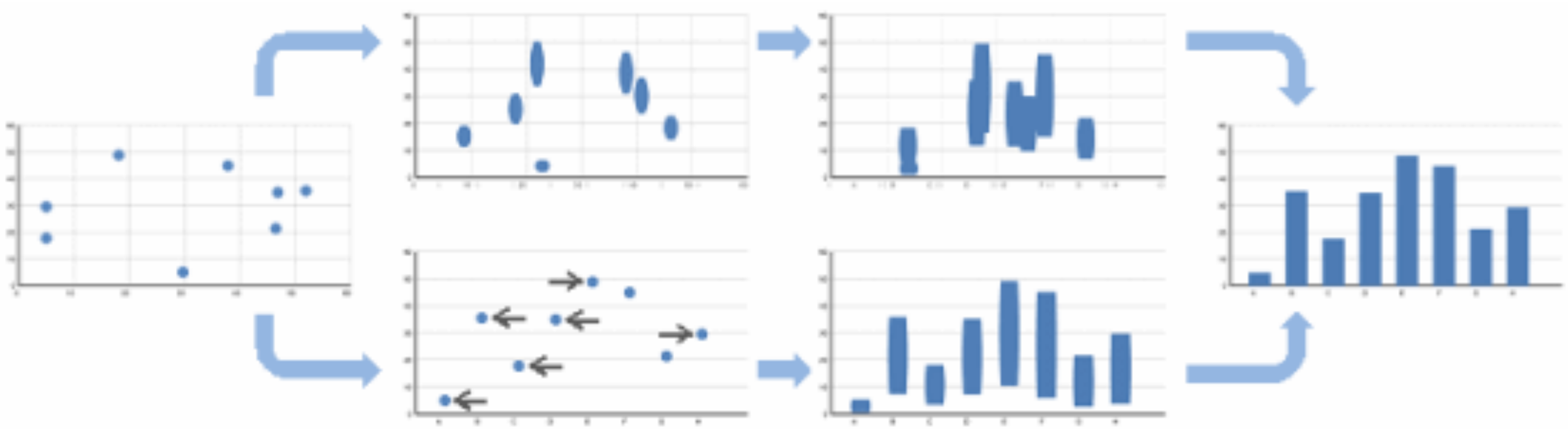
- APGI genome browser
  - tooling: R/Shiny
  - interactivity
    - tooltip detail on demand on hover
    - expand/contract chromosomes
    - expand/contract control panes



https://gallery.shinyapps.io/genome_browser/

Idiom: **Animated transitions**

- smooth interpolation from one state to another
  - alternative to jump cuts, supports item tracking
    - best case for animation
  - staging to reduce cognitive load
- example: animated transitions in statistical data graphics

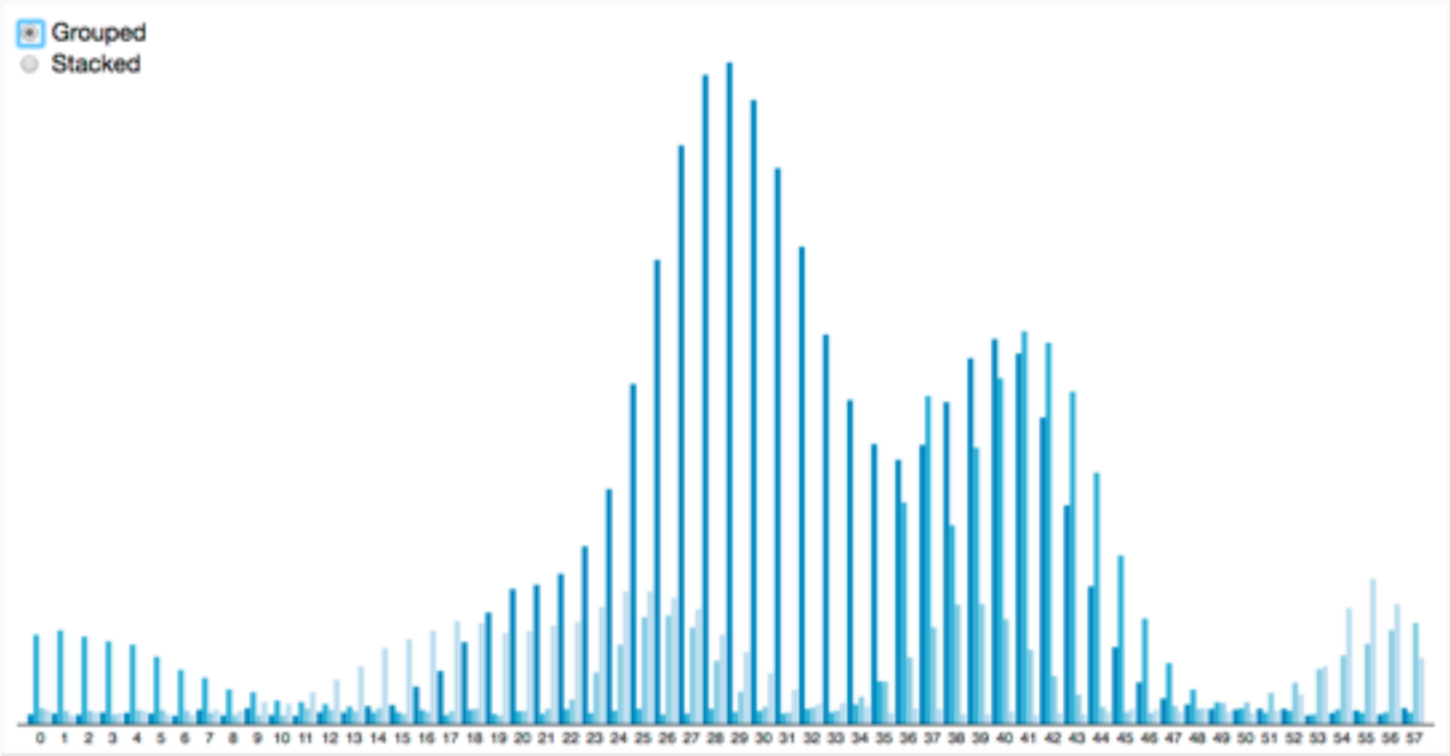


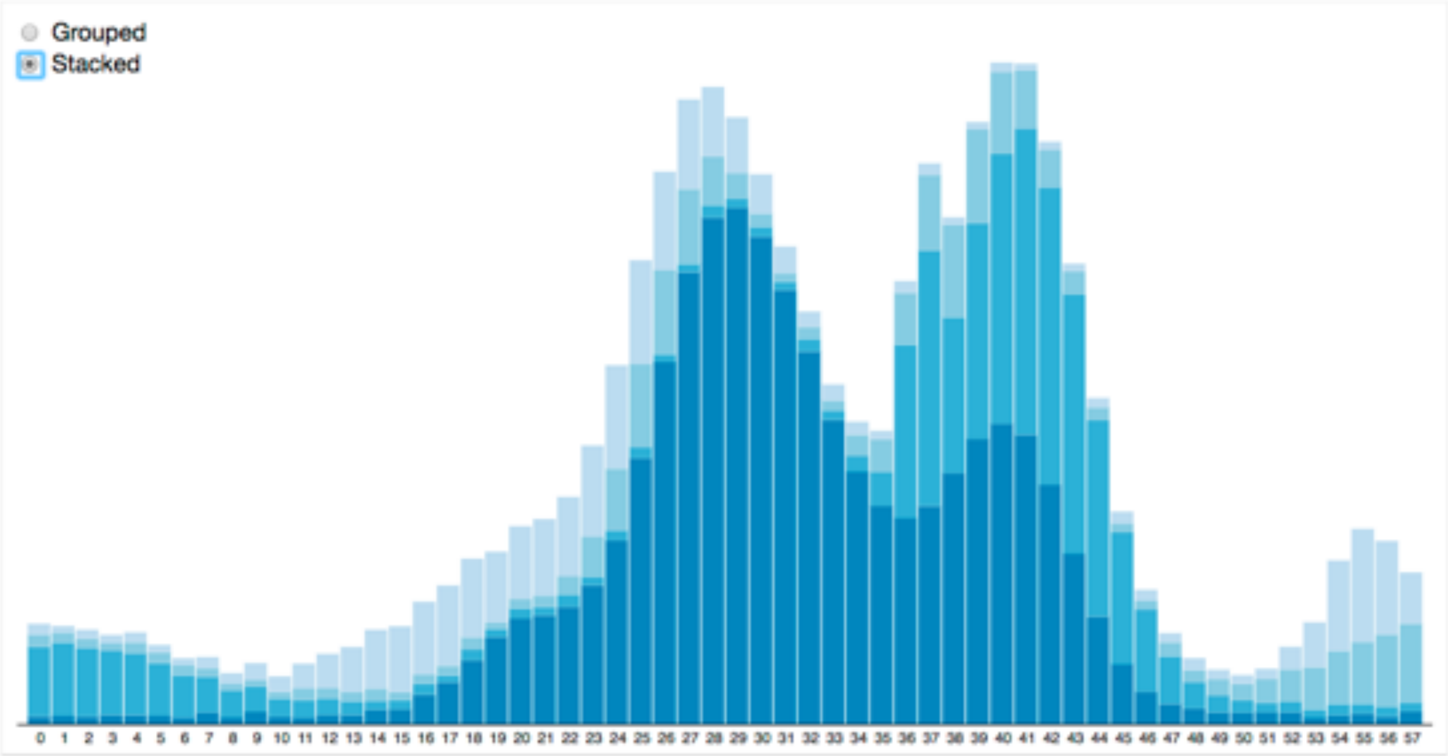
video: vimeo.com/19278444

[Animated Transitions in Statistical Data Graphics. Heer and Robertson. IEEE TVCG (Proc InfoVis 2007) 13(6):1240-1247, 2007]

Idiom: **Animated transitions - visual encoding change**

- smooth transition from one state to another
  - alternative to jump cuts, supports item tracking
    - best case for animation
  - staging to reduce cognitive load

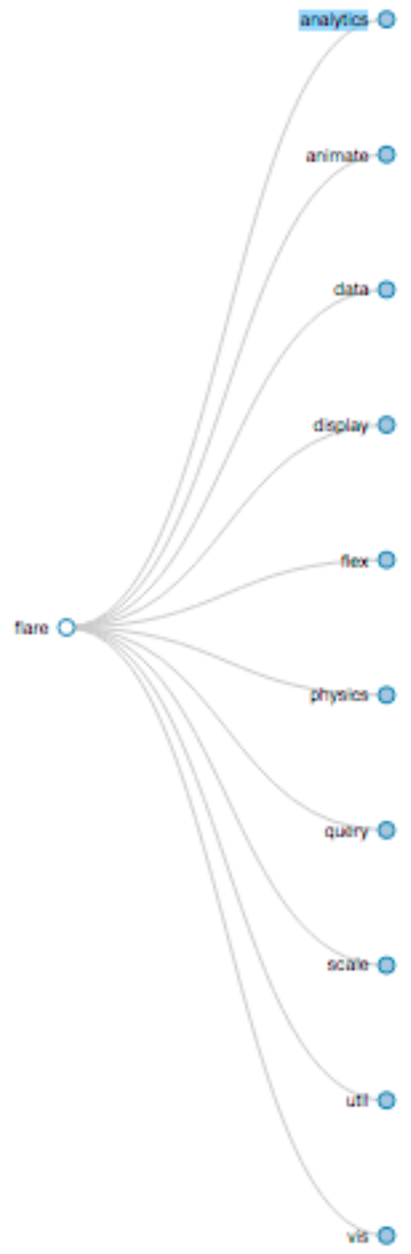


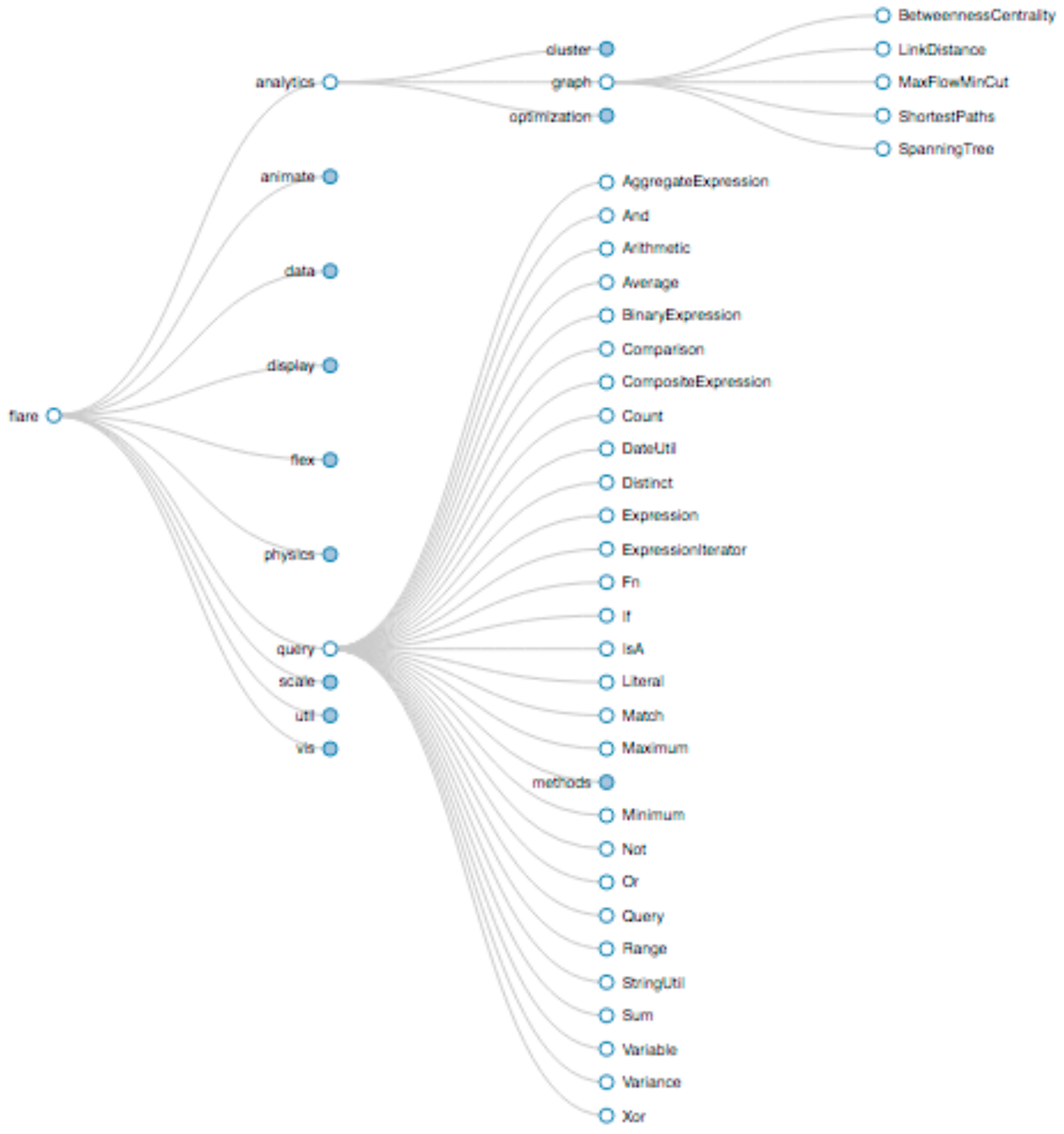


[Stacked to Grouped Bars](http://bl.ocks.org/mbostock/3943967)

Idiom: **Animated transition - tree detail**

- animated transition
  - network drilldown/rollup

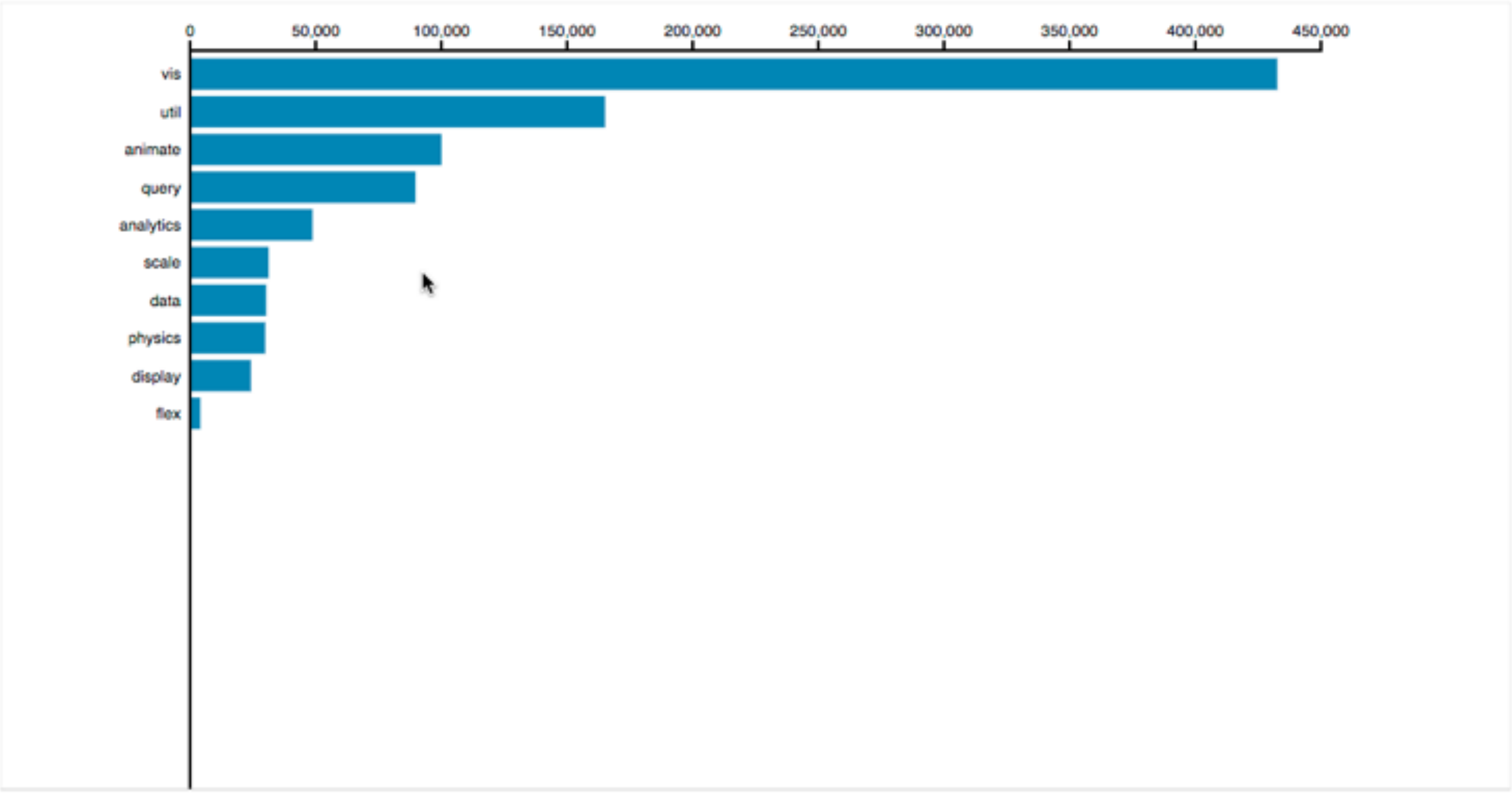




[Collapsible Tree](https://bl.ocks.org/mbostock/4339083)

Idiom: **Animated transition - bar detail**

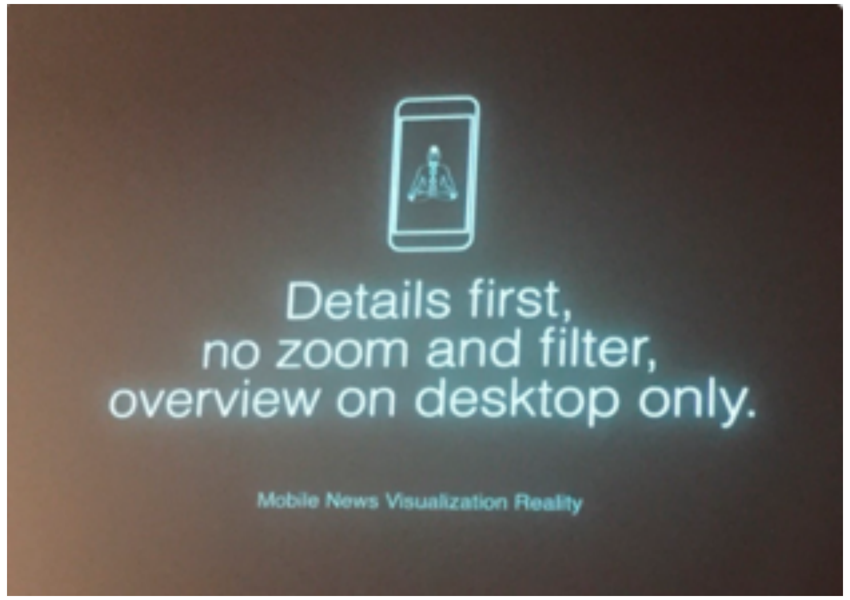
- example: hierarchical bar chart
  - add detail during transition to new level of detail



[Hierarchical Bar Chart](https://bl.ocks.org/mbostock/1283663)

Interaction technology

- what do you design for?
  - mouse & keyboard on desktop?
    - large screens, hover, multiple clicks
  - touch interaction on mobile?
    - small screens, no hover, just tap
  - gestures from video / sensors?
    - ergonomic reality vs movie bombast
  - eye tracking?

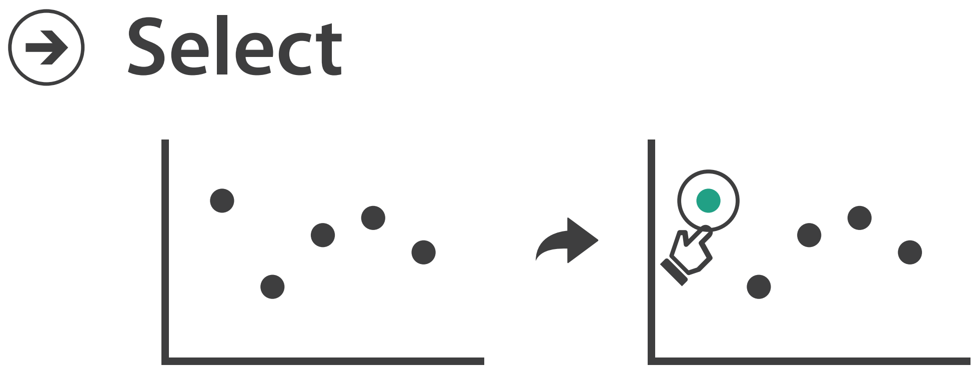


Data visualization and the news - Gregor Aisch (37 min)
vimeo.com/182590214

I Hate Tom Cruise - Alex Kauffmann (5 min)
www.youtube.com/watch?v=QXLfT9sFcbc

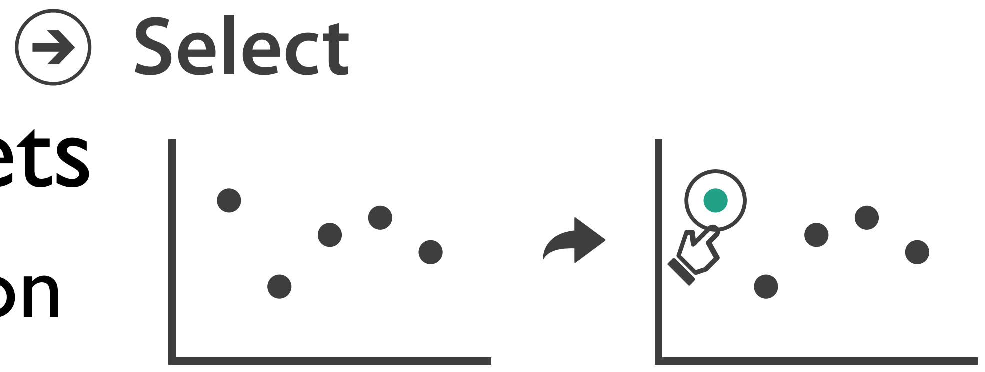
slide inspired by: Alexander Lex, Utah

Selection



- selection: basic operation for most interaction
- design choices
  - how many selection types?
    - interaction modalities
      - click/tap (heavyweight) vs hover (lightweight but not available on most touchscreens)
      - multiple click types (shift-click, option-click, …)
      - proximity beyond click/hover (touching vs nearby vs distant)
    - application semantics
      - adding to selection set vs replacing selection
      - can selection be null?
        - ex: toggle so nothing selected if click on background
      - primary vs secondary (ex: source/target nodes in network)
      - group membership (add/delete items, name group, …)

Highlighting



- highlight: change visual encoding for selection targets
  – visual feedback closely tied to but separable from selection (interaction)
- design choices: typical visual channels
  – change item color
    - but hides existing color coding
  – add outline mark
  – change size (ex: increase outline mark linewidth)
  – change shape (ex: from solid to dashed line for link mark)
- unusual channels: motion
  – motion: usually avoid for single view
    - with multiple views, could justify to draw attention to other views

Tooltips

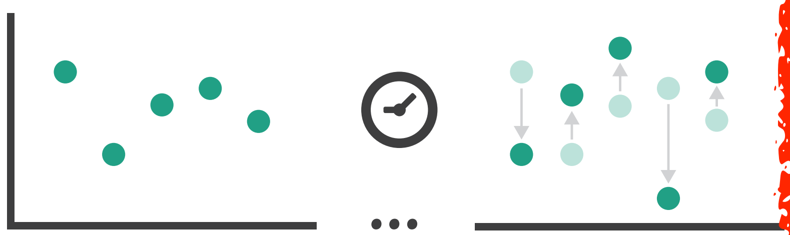
- popup information for selection
  - hover or click
  - can provide useful additional detail on demand
  - beware: does not support overview!
    - always consider if there's a way to visually encode directly to provide overview
    - "If you make a rollover or tooltip, assume nobody will see it. If it's important, make it explicit."
      - Gregor Aisch, NYTimes

Rule of thumb: **Responsiveness is required**

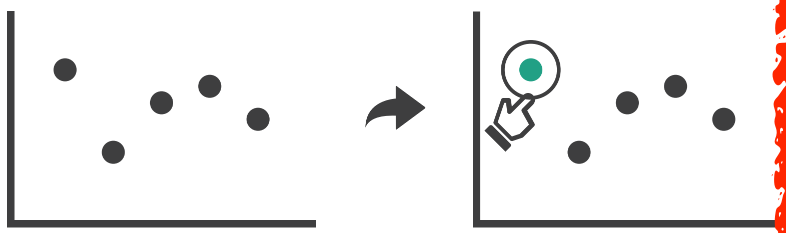
- *visual feedback: three rough categories*
  - *0.1 seconds: perceptual processing*
    - subsecond response for mouseover highlighting - ballistic motion
  - *1 second: immediate response*
    - fast response after mouseclick, button press - Fitts' Law limits on motor control
  - *10 seconds: brief tasks*
    - bounded response after dialog box - mental model of heavyweight operation (file load)
- scalability considerations
  - highlight selection without complete redraw of view (graphics frontbuffer)
  - show hourglass for multi-second operations (check for cancel/undo)
  - show progress bar for long operations (process in background thread)
  - rendering speed when item count is large (guaranteed frame rate)

Manipulate

Change over Time



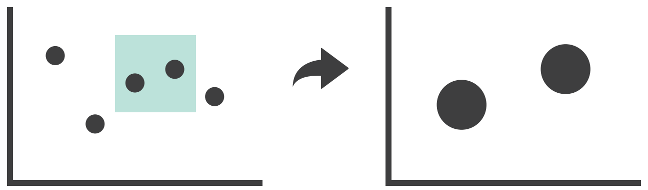
Select



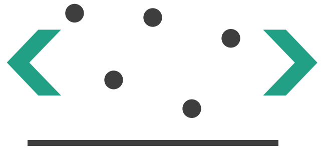
Navigate

Item Reduction

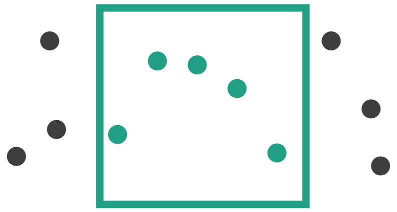
- *Zoom*
  Geometric or *Semantic*



- *Pan/Translate*



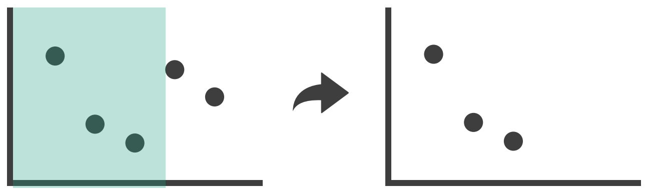
- *Constrained*



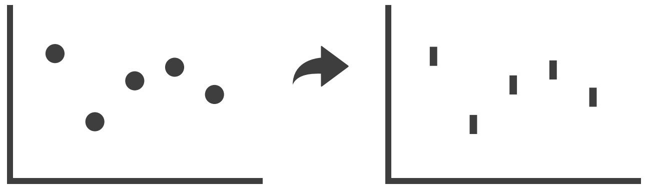
Attribute Reduction

- *Slice*

- *Cut*

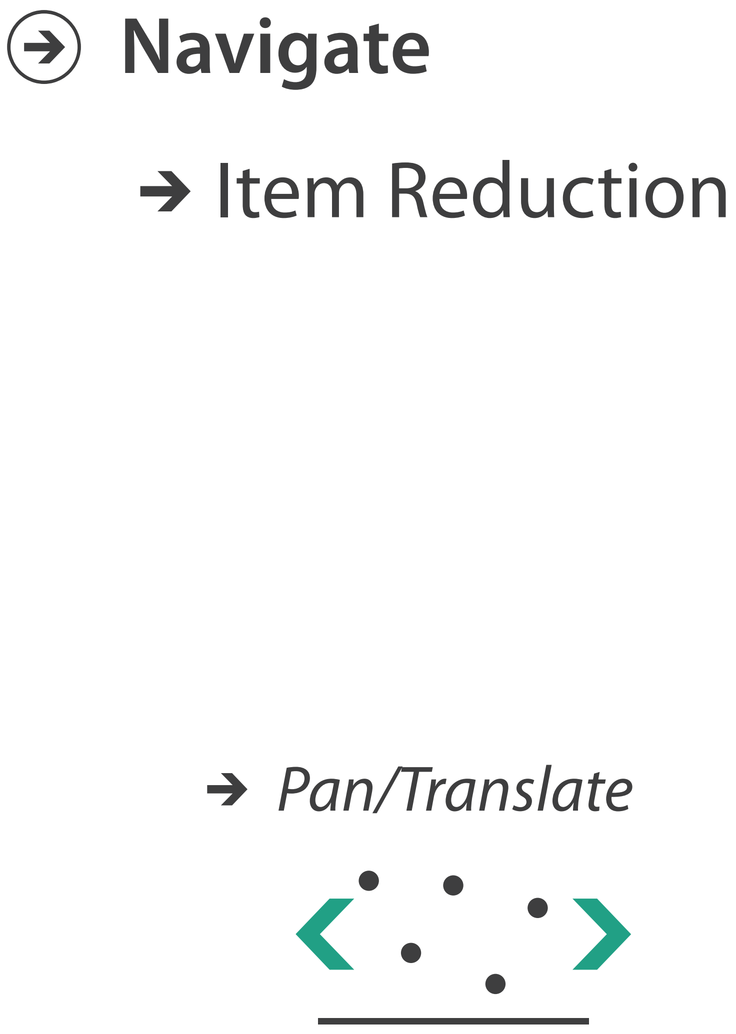


- *Project*



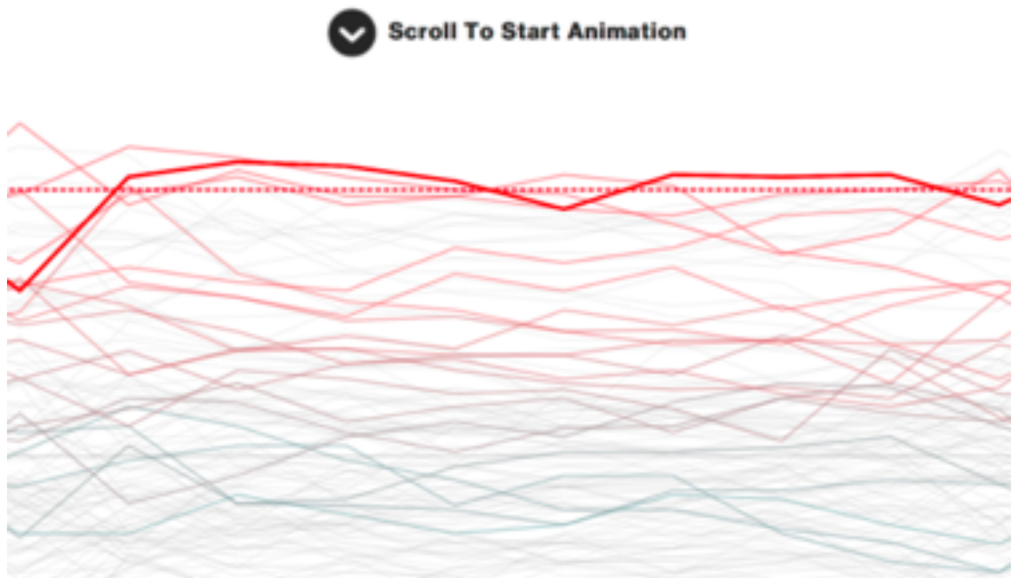
Navigate: Changing viewpoint/visibility

- change viewpoint
  - changes which items are visible within view
- camera metaphor
  - pan/translate/scroll
    - move up/down/sideways



Idiom: **Scrollytelling**

- how: navigate page by scrolling (panning down)
- pros:
  - familiar & intuitive, from standard web browsing
  - linear (only up & down) vs possible overload of click-based interface choices
- cons:
  - full-screen mode may lack affordances
  - scrolljacking, no direct access
  - unexpected behaviour
  - continuous control for discrete steps

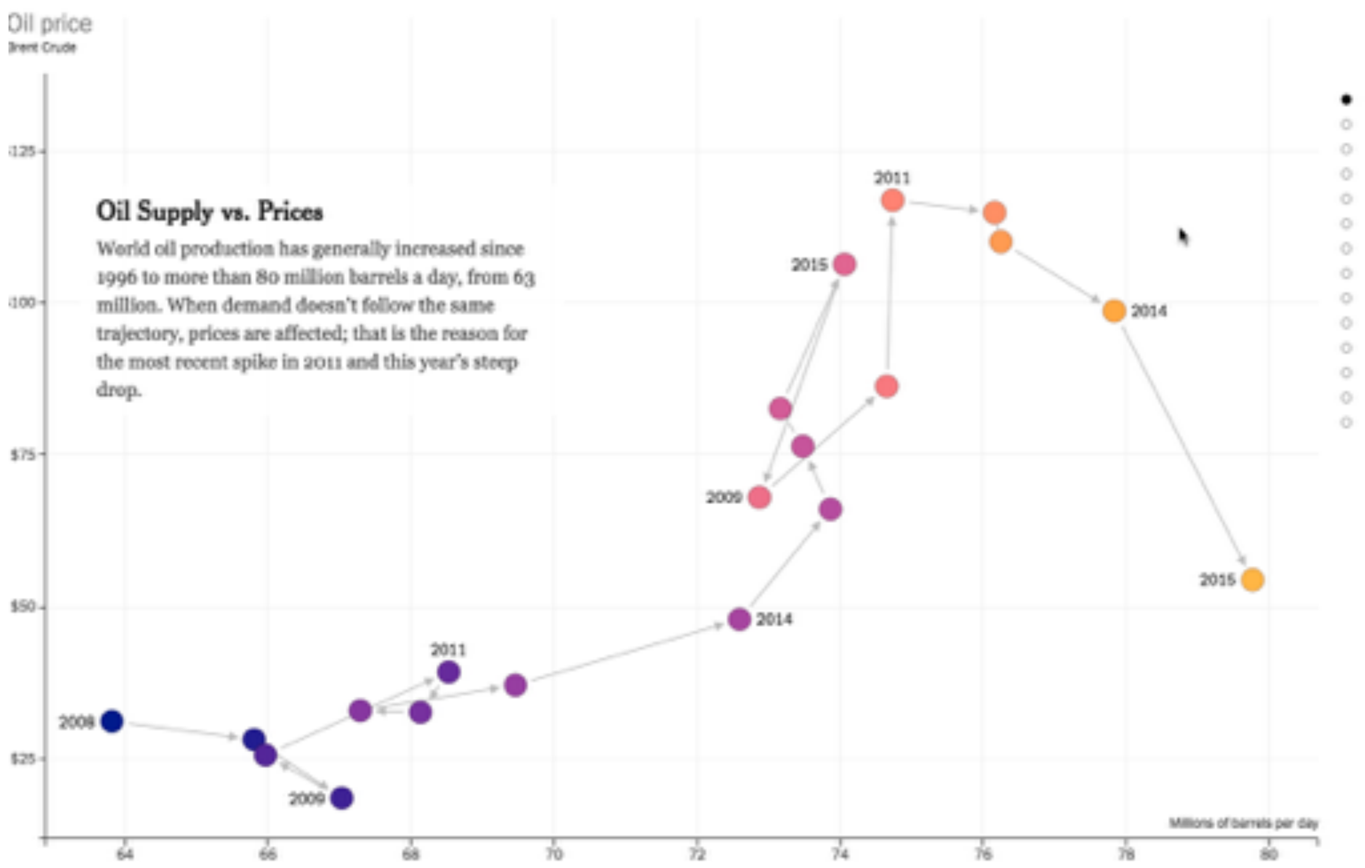


https://eagereyes.org/blog/2016/the-scrollytelling-scourge

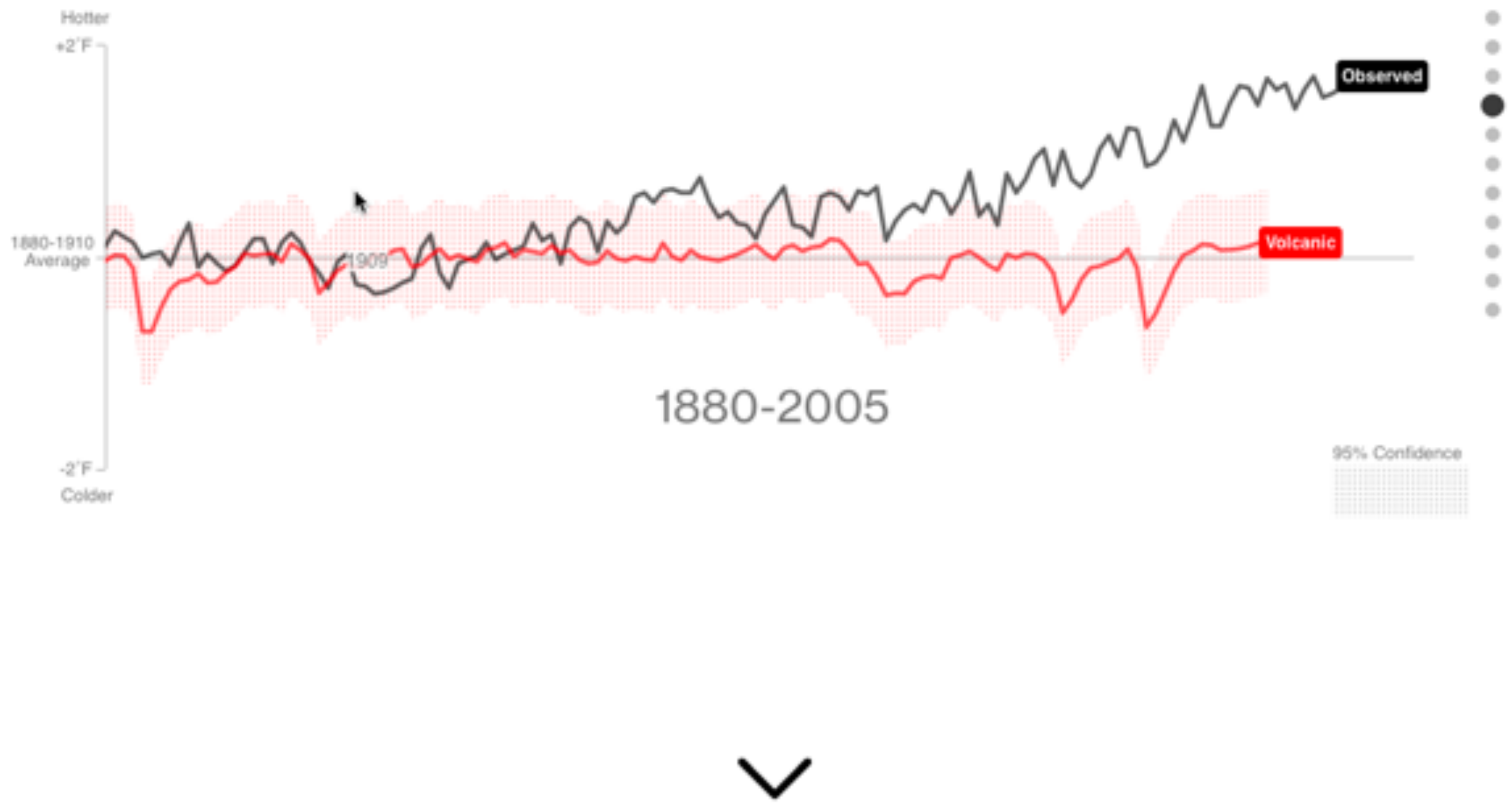
[How to Scroll, Bostock](https://bost.ocks.org/mike/scroll/)

slide inspired by: Alexander Lex, Utah

Scrollytelling examples



https://www.nytimes.com/interactive/2015/09/30/business/how-the-us-and-opec-drive-oil-prices.html?_r=1



https://www.bloomberg.com/graphics/2015-whats-warming-the-world/

slide inspired by: Alexander Lex, Utah

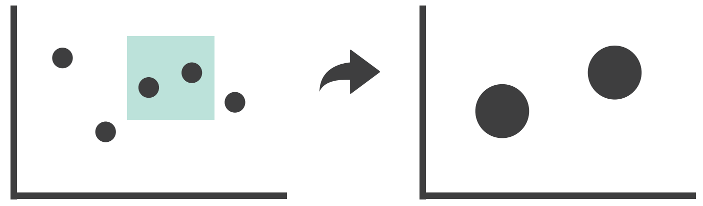
Navigate: Changing viewpoint/visibility

- change viewpoint
  - changes which items are visible within view
- camera metaphor
  - pan/translate/scroll
    - move up/down/sideways
  - rotate/spin
    - typically in 3D
  - zoom in/out
    - enlarge/shrink world == move camera closer/further
    - geometric zoom: standard, like moving physical object

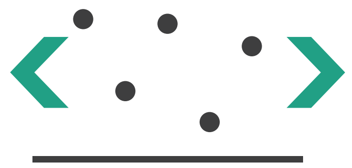
Navigate

→ Item Reduction

→ *Zoom*
Geometric

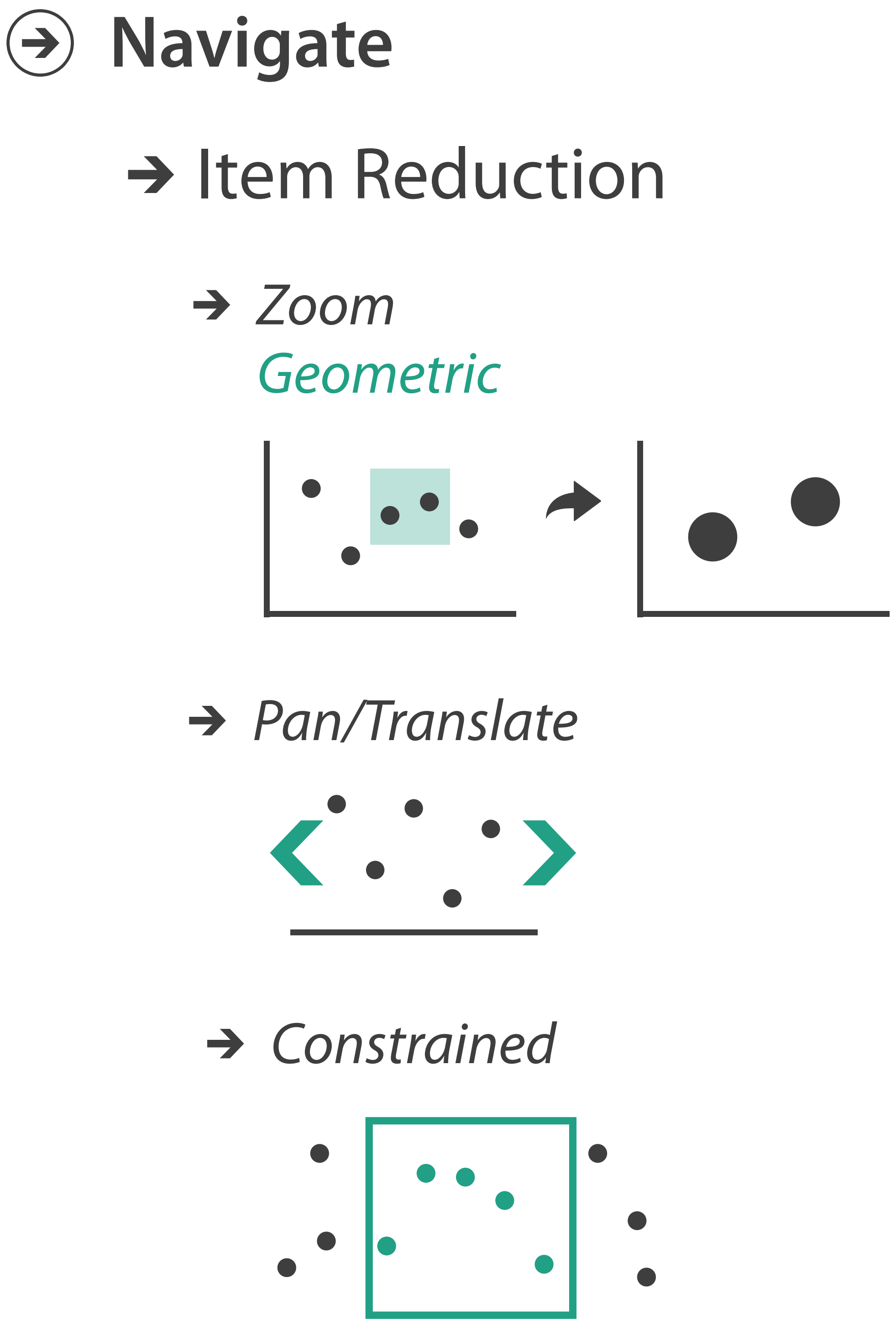


→ *Pan/Translate*



Navigate: Unconstrained vs constrained

- unconstrained navigation
  - easy to implement for designer
  - hard to control for user
    - easy to overshoot/undershoot
- constrained navigation
  - typically uses animated transitions
  - trajectory automatically computed based on selection
    - just click; selection ends up framed nicely in final viewport



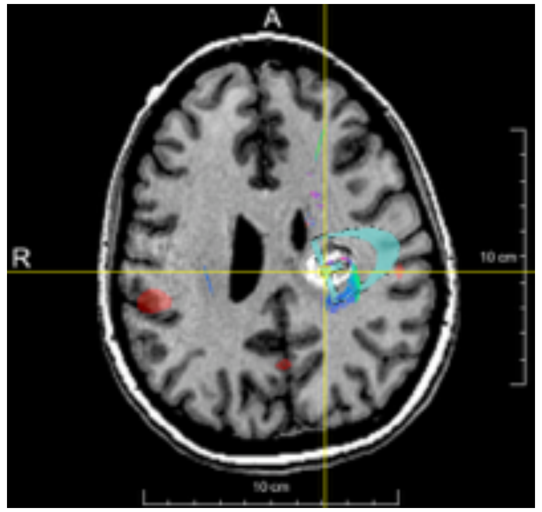
Idiom: **Animated transition + constrained navigation**

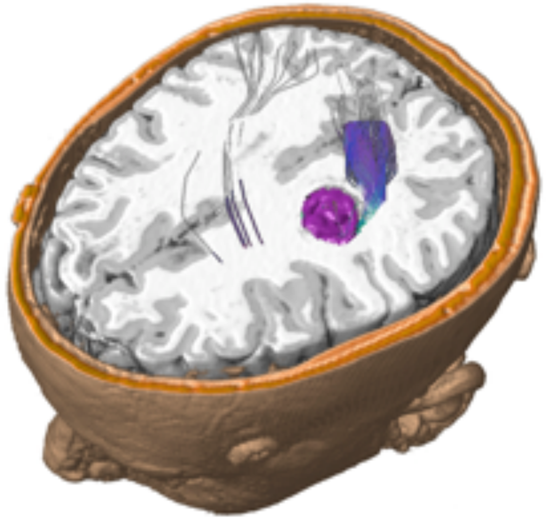
- example: geographic map
  - simple zoom, only viewport changes, shapes preserved

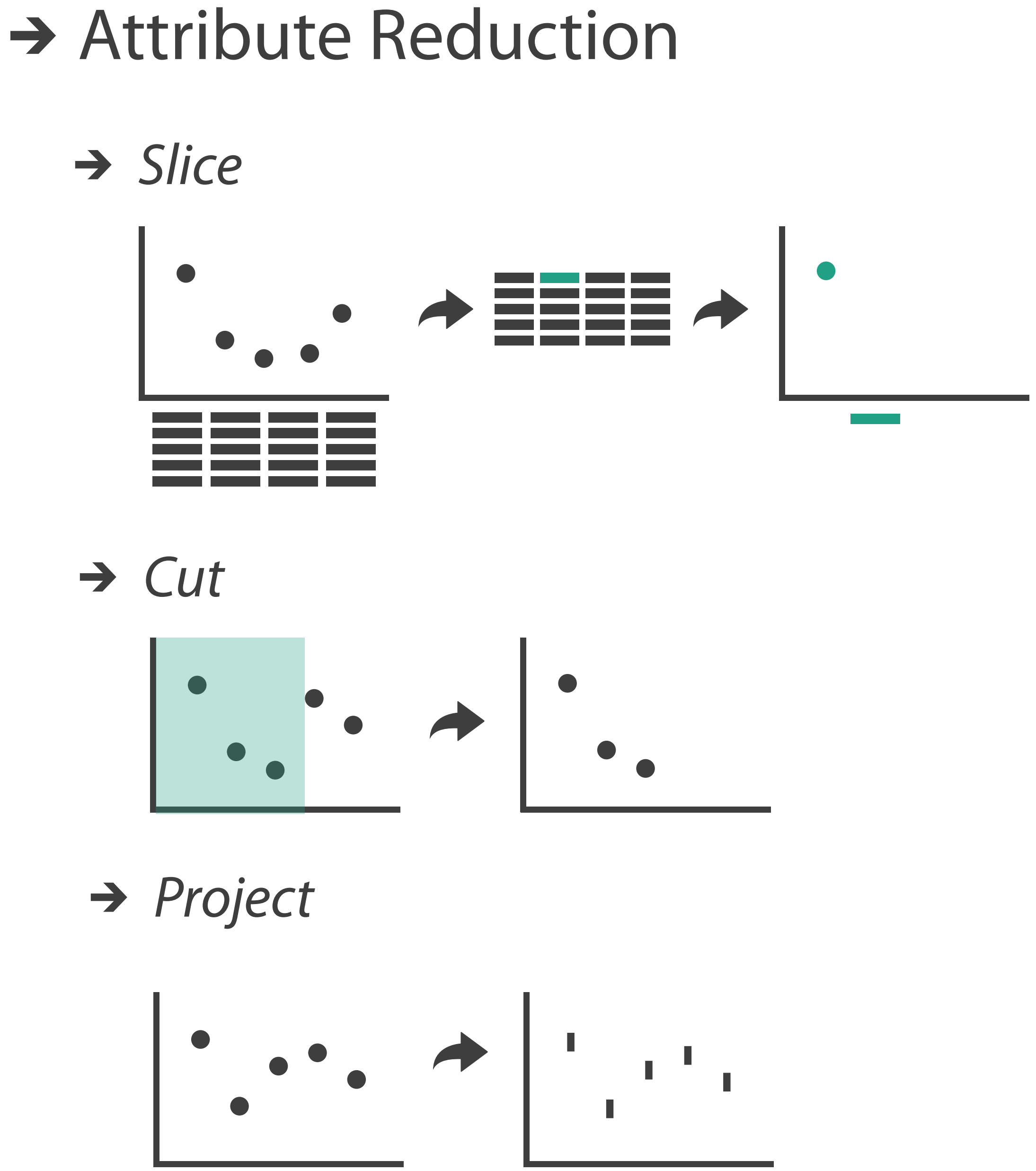
[Zoom to Bounding Box](https://bl.ocks.org/mbostock/4699541)

Navigate: Reducing attributes

- continuation of camera metaphor
  - slice
    - show only items matching specific value for given attribute: slicing plane
    - axis aligned, or arbitrary alignment
  - cut
    - show only items on far slide of plane from camera
  - project
    - change mathematics of image creation
      - orthographic (eliminate 3rd dimension)
      - perspective (foreshortening captures limited 3D information)



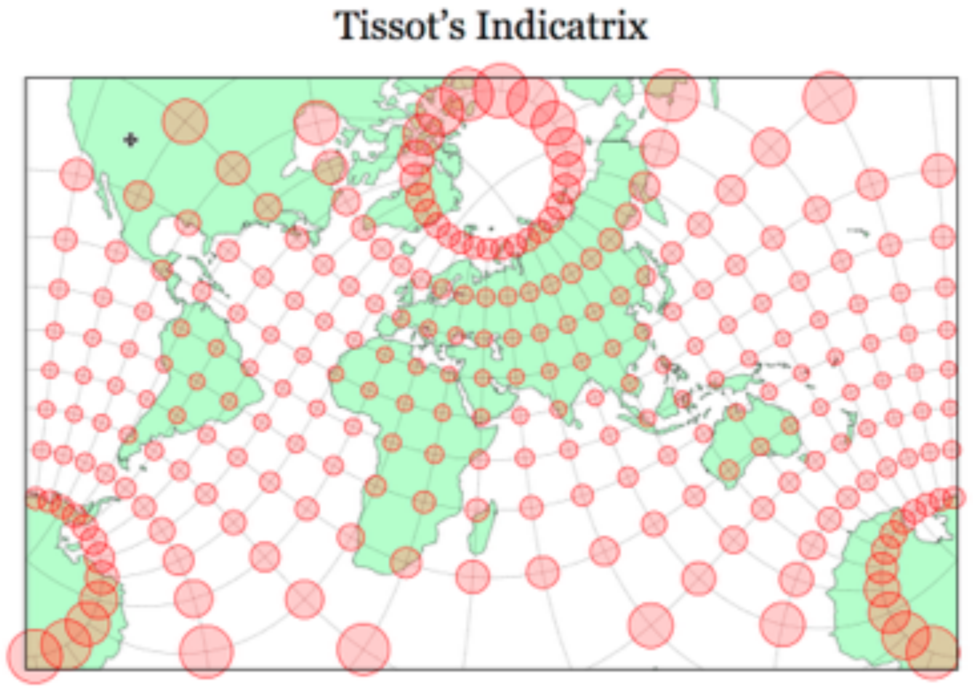




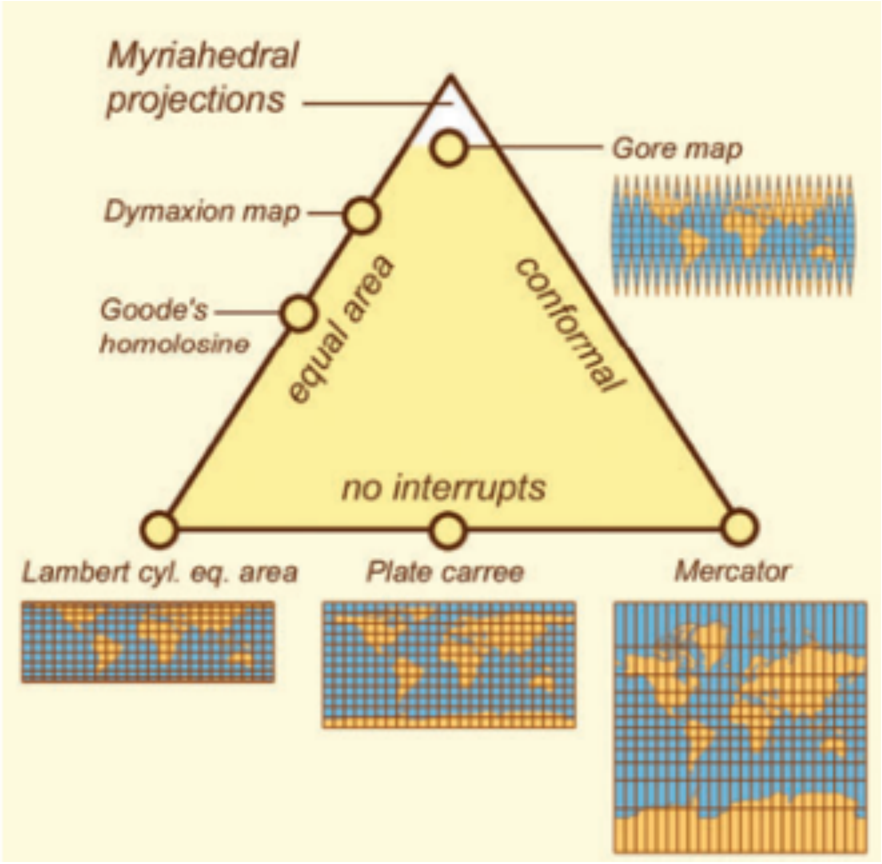
[Interactive Visualization of Multimodal Volume Data for Neurosurgical Tumor Treatment. Rieder, Ritter, Raspe, and Peitgen. Computer Graphics Forum (Proc. EuroVis 2008) 27:3 (2008), 1055–1062.]

Navigate: Cartographic projections

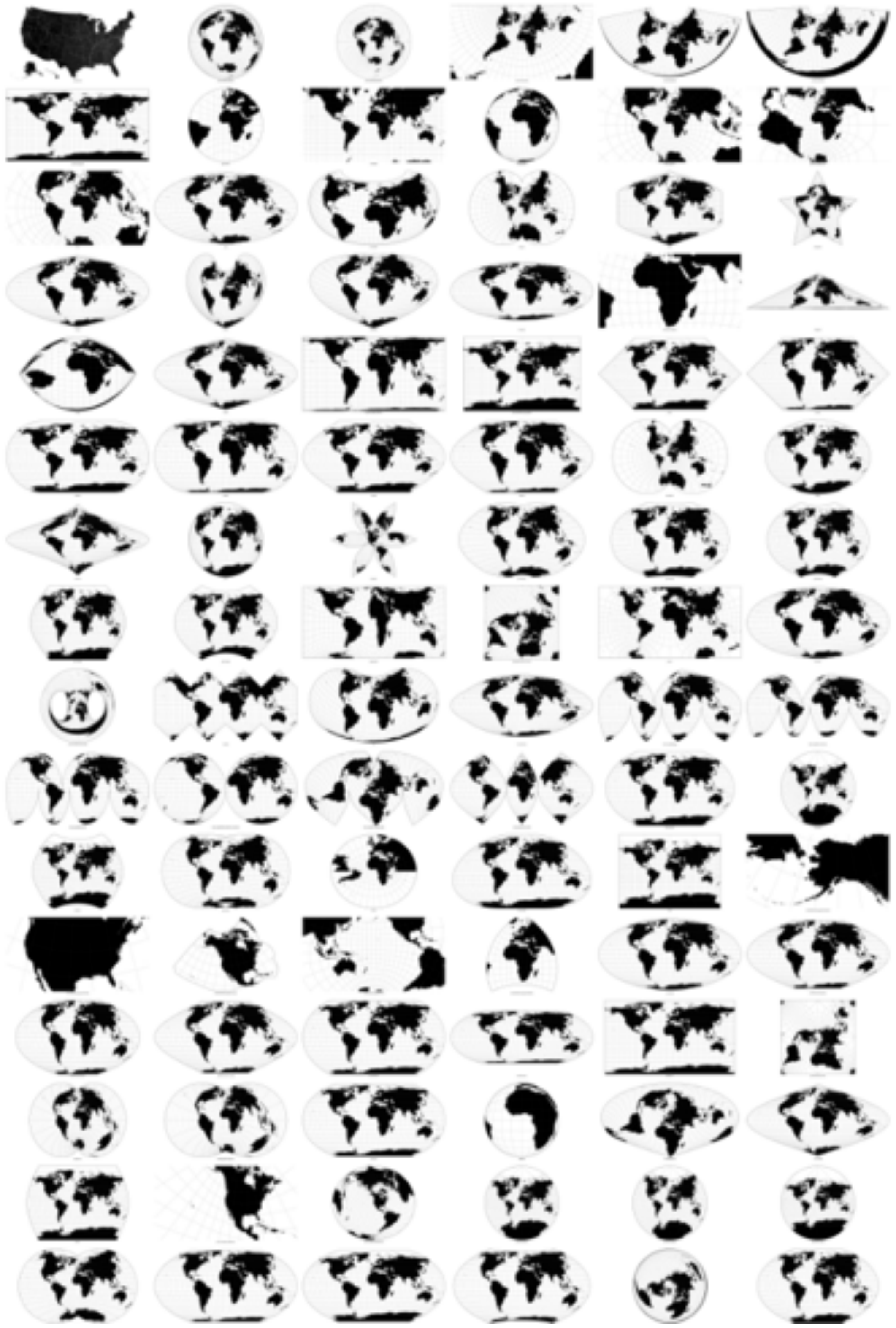
- project from 2D sphere surface to 2D plane
  - can only fully preserve 2 out of 3
    - angles: conformal
    - area: equal area
    - contiguity: no interruptions



https://www.jasondavies.com/maps/tissot/



https://www.win.tue.nl/~vanwijk/myriahedral/



[Every Map Projection](https://bl.ocks.org/mbostock/29cddc0006f8b98eff12e60dd08f59a7)

Interaction benefits

- interaction pros
  - major advantage of computer-based vs paper-based visualization
  - flexible, powerful, intuitive
    - exploratory data analysis: change as you go during analysis process
    - fluid task switching: different visual encodings support different tasks
  - animated transitions provide excellent support
    - empirical evidence that animated transitions help people stay oriented

Interaction limitations

- interaction has a time cost
  - sometimes minor, sometimes significant
  - degenerates to human-powered search in worst case
- remembering previous state imposes cognitive load
  - *rule of thumb: eyes over memory*
    - *hard to compare visible item to memory of what you saw*
    - ex: maintaining context/orientation when navigating
    - ex: tracking complex changes during animation
- controls may take screen real estate
  - or invisible functionality may be difficult to discover (lack of affordances)
- users may not interact as planned by designer
  - NYTimes logs show ~90% don't interact beyond scrollytelling - Aisch, 2016

Further reading

- Visualization Analysis and Design. Munzner. AK Peters Visualization Series, CRC Press, 2014.
  - *Chap 11: Manipulate View*
- *Animated Transitions in Statistical Data Graphics*. Heer and Robertson. IEEE Trans. on Visualization and Computer Graphics (Proc. InfoVis07) 13:6 (2007), 1240–1247.
- *Selection: 524,288 Ways to Say "This is Interesting"*. Wills. Proc. IEEE Symp. Information Visualization (InfoVis), pp. 54–61, 1996.
- *Smooth and efficient zooming and panning*. van Wijk and Nuij. Proc. IEEE Symp. Information Visualization (InfoVis), pp. 15–22, 2003.
- *Starting Simple - adding value to static visualisation through simple interaction*. Dix and Ellis. Proc. Advanced Visual Interfaces (AVI), pp. 124–134, 1998.