Principles Of Information Visualization

What is information visualization

Tufte's guidelines

Visual variables for representing information

The principle of small multiples for displaying information

How metaphors can be used and misused

Direct manipulation and direct engagement

Iomas Tom

Representations

Good representations

- Captures essential elements of the event / world
- Deliberately leaves out / mutes the irrelevant
- Appropriate for the person and their interpretation
- · Appropriate for the task, enhancing judgment ability

How many buffalo?





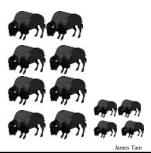
Buffalo



Buffalo



8



Representation

A representation is

- $\bar{\mathbf{A}}$ formal system or mapping by which the information can be specified (D. Marr)
- A sign system in that it stands for something other than its self (unknown source)
- A method of encoding information (my description)

For example: the number thirty-four *or* the buffalo example

Decimal: 34, (the most familiar number base)

Binary: 100010, (most closely parallels machine architecture)

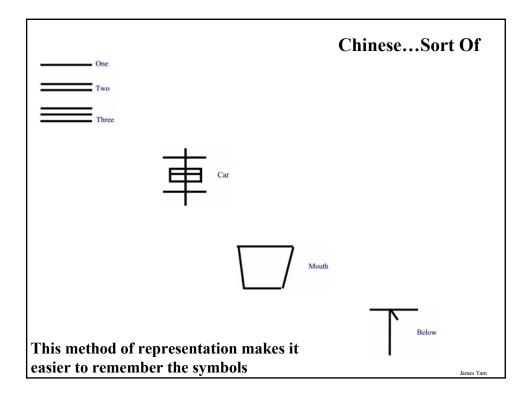
Roman: XXXIV (counting)

James Tam

Presentation

Not the same as representation!

The presentation of information deals with how the representation is placed or organized on the screen



Characteristics Of Good Representations

- 1. The representation makes it easier to find the relevant information.
 - Solving a problem simply means representing it so as to make the solution transparent ... (Simon, 1981)
- 2. (Once the information has been found) good representations makes it easier to make use of the information.
 - Allow people to *compute* desired conclusions
 - Trying to make use of the information may be a difficult process or "for free" depending on the representation chosen

Representations: The Information Is Present But Hard To Find

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	THE REAL PROPERTY AND ADDRESS OF THE PERSONS

Iomas Tom

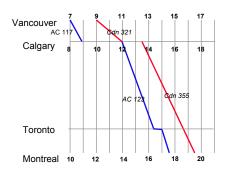
Representations: The Information Is Present But Making Sense Of It Requires Much Effort

Quarterly Income Statements in millions, except earnings per share																
	Q	2-01*	Q	3-01*	Ç	24-01*	Q1-02	(Q2-02	(23-02	(Q4-02	(21-03	ζ
levenue	\$	6,550	\$	6,403	\$	6,577	\$ 6,126	\$	7,741	\$	7,245	\$	7,253	\$	7,746	\$
Operating expenses:																
Cost of revenue		864		899		867	978		1,691		1,567		1,463		1,344	
Research and development		990		1,069		1,364	1,398		1,595		1,474		1,832		1,707	
Acquired in-process technology																
Sales and marketing		1,290		1,198		1,359	1,457		1,676		1,449		1,670		1,415	
General and administrative		212		239		236	286		885		343		329		252	
Other expenses																
Total operating expenses		3,356		3,405		3,826	4,119		5,847		4,833		5,294		4,718	
Operating income		3,194		2,998		2,751	2,007		1,894		2,412		1,959		3,028	
osses on equity investees and other		(28)		(46)		(33)	(30)		(37)		(11)		(14)		(22)	
nvestment Income		751		706		(2,620)	(980)		553		739		(617)		41	
Voncontinuing items																
ncome before income taxes		3,917		3,658		98	997		2,410		3,140		1,328		3,047	
Provision for income taxes		1,293		1,207		33	319		771		1,005		425		1,006	
ncome before accounting change		2,624		2,451		65	678		1,639		2,135		903		2,041	
Sumulative effect of accounting change		-		-		-	-		-		-		-		-	
Vet income	\$	2,624	\$	2,451	\$	65	\$ 678	\$	1,639	S	2,135	\$	903	\$	2,041	\$
referred stock dividends																
Vet income available for common shareholders	\$	2,624	\$	2,451	\$	65	\$ 678	\$	1,639	\$	2,135	\$	903	\$	2,041	\$
Basic EPS before accounting change		\$0.25		\$0.23		\$0.01	\$0.06		\$0.15		\$0.20		\$0.08		\$0.19	_
Diluted EPS before accounting change		\$0.24		\$0.22		\$0.01	\$0.06		\$0.15		\$0.19		\$0.08		\$0.19	

Example One: Which Is The Best Flight?

Length, stop-overs, switches...

-		рерап	Arrive
AC 117	Vancouver - Calgary	7:00	9:00
Cdn 321	Vancouver - Calgary	9:00	12:00
Cdn 355	Calgary - Montreal	13:30	19:30
AC 123	Calgary - Toronto	12:30	16:30
AC 123	Toronto - Montreal	16:45	17:30
*time zo	ne: +1 van-cal, +	-2 cal-to:	c, mtl



Iomas Tom

Example Two: When Do I Take My Drugs? (From "Things That Make Us Smart" By Don Norman

Note: 10 - 30% error rate in taking pills, same for pillbox organizers

Inderal - 1 tablet 3 times a day Lanoxin -1 tablet every a.m.

Carafate - 1 tablet before meals and at bedtime

Zantac - 1 tablet every 12 hours (twice a day)

Quinag - 1 tablet 4 times a day

Couma - 1 tablet a day

Bre	akfast	Lunch	Dinner	Bedtime
Lanoxin	O			
Inderal	O	O	O	
Quinag	O	O	О	О
Carafate	O	O	O	O
Zantac		O		О
Couma				О

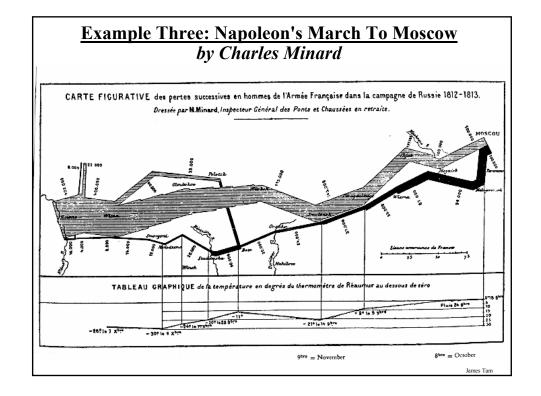
Breakfast	Lunch	Dinner	Bedtime
Lanoxin			
Inderal	Inderal	Inderal	
Quinag	Quinag	Quinag	Quinag
Carafate	Carafate	Carafate	Carafate
	Zantac		Zantac
			Couma

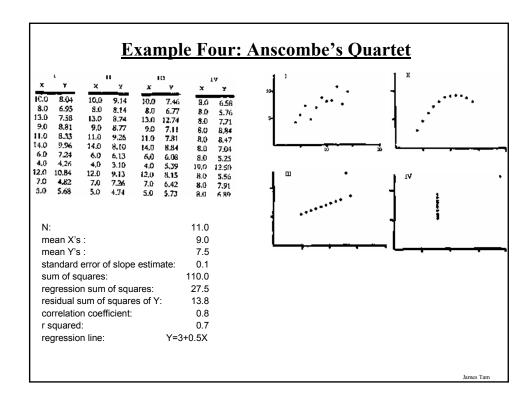
Organized by both time of day and by drug

Example Three: Napoleon's March To Moscow by Charles Minard









Example Five: Do I Deserve A Tax Break

	Α	В
1	Market value (\$)	Improvement cost (\$)
2	140000	31120
3	147000	29980
4	151000	38120
5	152000	34360
6	155000	40710
7	170000	21620
8	172000	42100
9	178000	41070
10	180000	34210
11	180000	44090
12	182000	55960
13	185000	45170
14	185000	46820
15	193400	50200
16	194500	71860
17	197000	48460
18	203000	40720
19	205000	56600
20	213000	42780
21	221000	58770
22	225000	58960
23	245000	48910
24	248000	62620
25	278000	58580
26	302500	72200
27	308000	67320





Not All Diagrammatic Representations Are Equally Effective

First representation

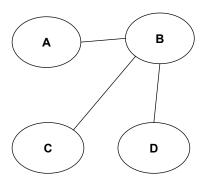








Second representation



From Information Visualization: Perception for Design by Colin Ware.

Iomas Tom

Tufte's Principles Of Information Visualization₁

Graphics should reveal the data

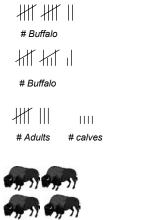
- Show the data
- Not get in the way of the message
- · Avoid distortion
- Present many numbers in a small space
- Make large data sets coherent
- Encourage comparison between data
- Supply both a broad overview and fine detail
- Serve a clear purpose

1 "Visual Display of Quantitative Information" by E. Tufte
Note: Some of the visual examples on the following slides are taken from
Tufte's books

lames Tam

Show The Data





Inmos Ton

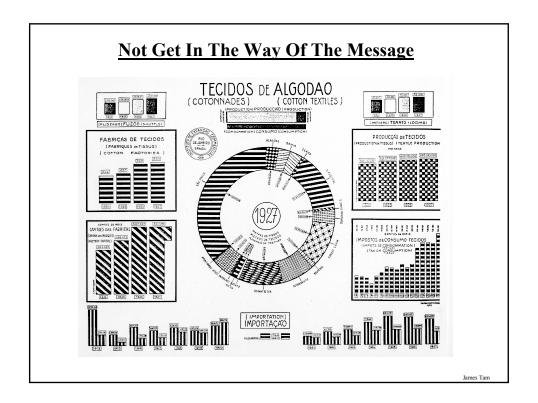
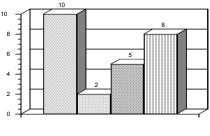


Chart Junk: A Common Error (The Representation Getting In The Way Of The Message)

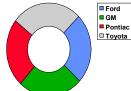
Information display is not just pretty graphics

- Graphical re-design by amateurs on computers gives us
 - Overly complicated or even deceptive representations



■ GM ■ Pontiac

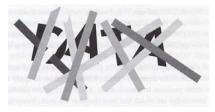




The Representation Should Not Get In The Way Of The Message

But it's not just as simple as removing "irrelevant" information.

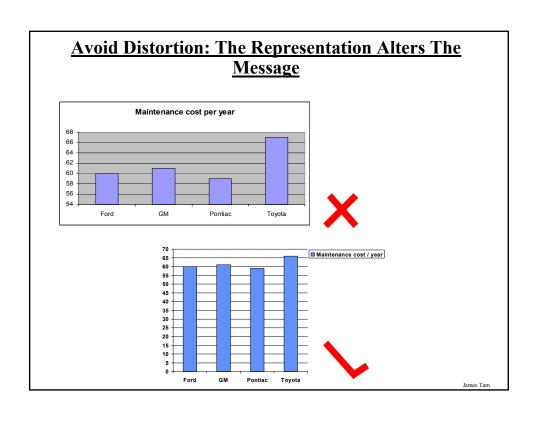
Extra clutter?

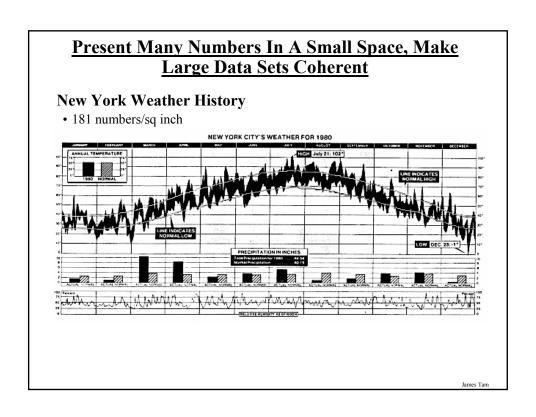


Is the message clearer?

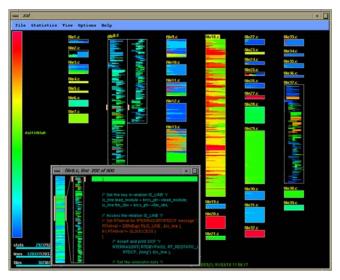


From "Information Visualization: Perception for Design" by Colin Ware





Encourage Comparison Between The Data



1) "Seesoft—A Tool for Visualizing Line Oriented Software Statistics", Eick S.G., Steffen J.L. and Sumner E.E

James Tam

Broad Overview And Fine Detail

|--|

Air-assataming
Both sententrisenss
Both malest rest
Both hardware
Both hardware
Both hardware
Both hardware
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Applying Visual Representations To A Common Task: Browsing A Large Dataset

Example: Browsing for a house

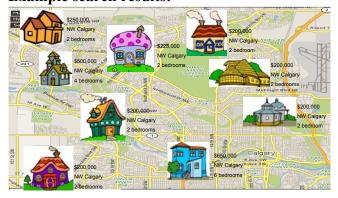




James Tam

A Model Of Perceptual Processing¹

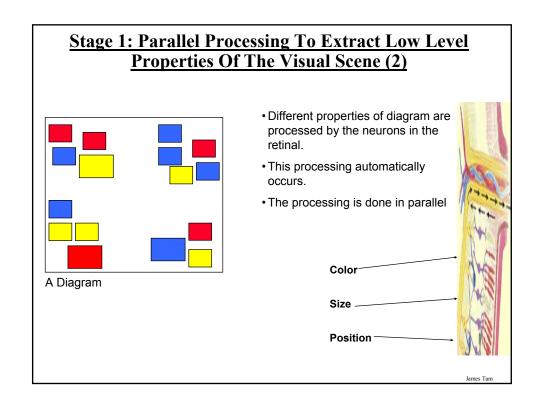
- •The set of information is large to show all at once.
- •Example search results:



•To help assist the person in this type of situation, take advantage of how people process visual information.

1 From "Information Visualization: Perception for Design" by Colin Ware

Stage 1: Parallel Processing To Extract Low Level Properties Of The Visual Scene Diagram of the human eye from The John Moran Eye Center The Brain from top to bottom



Stage 1: Parallel Processing To Extract Low Level Properties Of The Visual Scene (3)

Characteristics of visual information that can be automatically processed:

- 1. Processing cannot be inhibited
- 2. Information is rapidly processed
- 3. Information can be processed in parallel
- 4. Can be understood without training

Communicate information by relying on perceptual powers of the brain without learning.

Examples:

- Color
- Size
- Many more to come...

James Tan

Applying Stage 1 Processing To The Problem Of Browsing A Large Dataset

Representing information in a manner that can be automatically processed can help the person browse a large data set.

85689726984689762689764358922659865986554897689269898 02462996874026557627986789045679232769285460986772098 90834579802790759047098279085790847729087590827908754 98709856749068975786259845690243790472190790709811450 85689726984689762689764458922659865986554897689269898

Vs.

358922659865986554897689269898 **3**2769285460986772098 **3**4579802790759047098279085790847729087590827908754 **3**790472190790709811450 85689726984689762689764458922659865986554897689269898

Stage 2: Sequential Goal-Directed Processing

The focus now shifts from gathering perceptual information about large quantities of information to getting details about a single object.

At this stage information can be represented in a fashion that requires controlled processing (not automatic).

Characteristics of representations that require controlled processing:

- 1. Requires conscious effort
- 2. Slow serial processing
- 3. Hard to learn
- 4. Easy to forget
- 5. Formally powerful

Example of a representation that require controlled processing:

•Written language

Inmos Ton

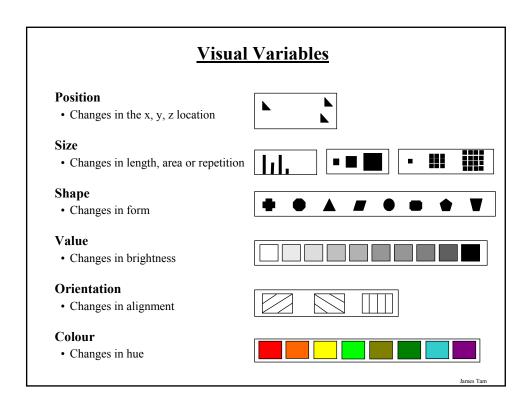
Automatic Vs. Controlled Processing Of Information

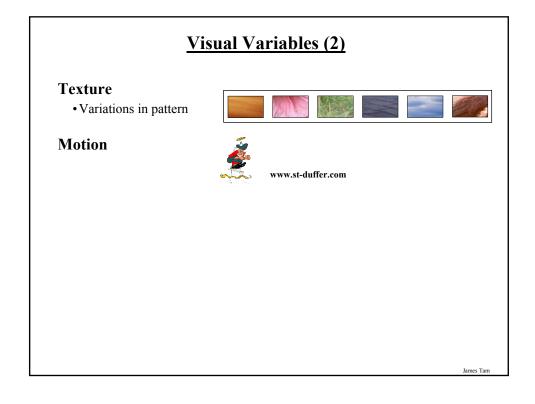
Controlled

For this question you are to write a function that will take as input a string and return an integer value that is the length of the string. The end of the string will always...

Automatic







Visual Variables (3)

Characteristics of visual variables

• Selective

Is a change in this variable enough to allow us to select it *from a group*?

Associative

Is a change in this variable enough to allow us to perceive them as a group?

• Quantitative

Is there a numerical reading obtainable from changes in this variable?

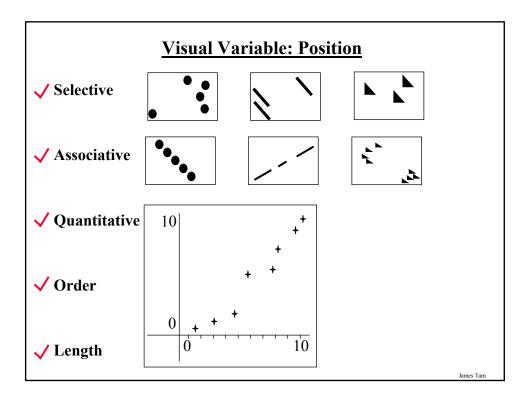
Order

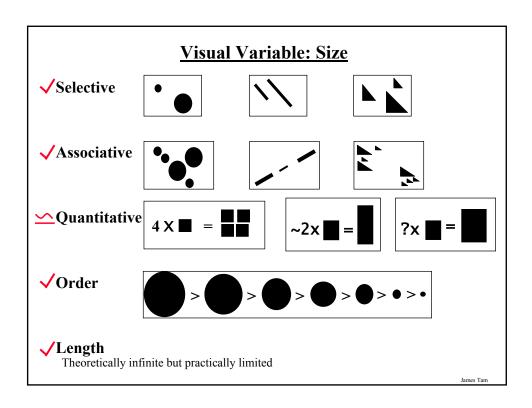
Do changes in the visual variable indicate some sort of ranking?

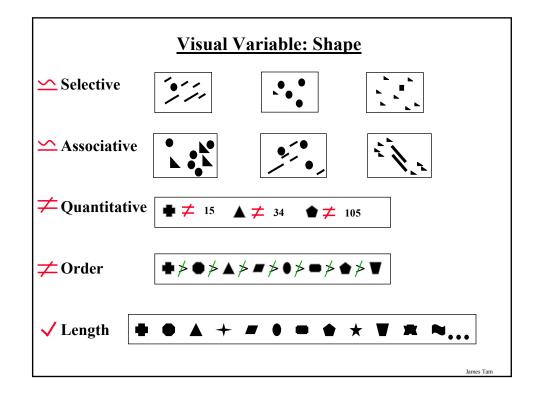
• Length1

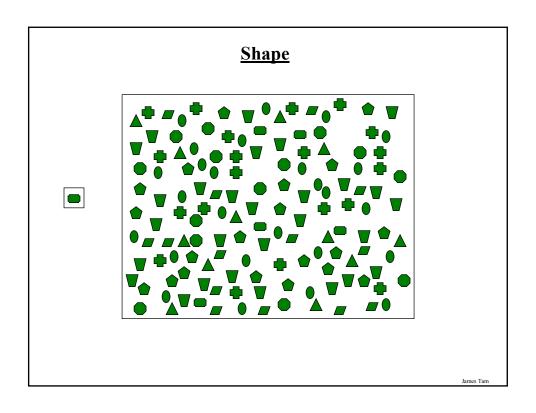
Across how many changes in this variable are distinctly perceptible?

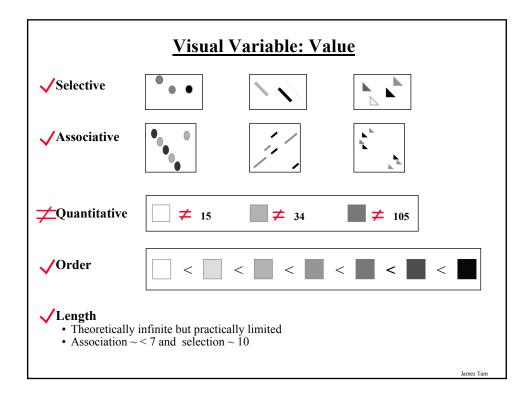
1 Think of it as variation

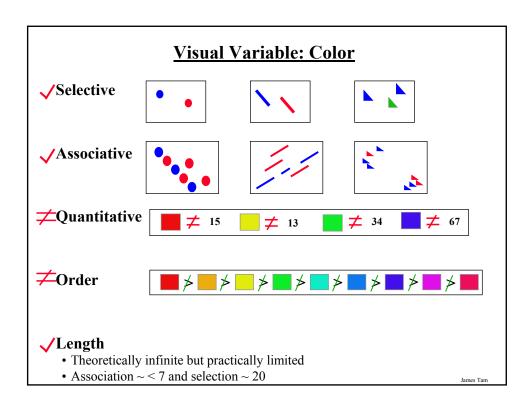


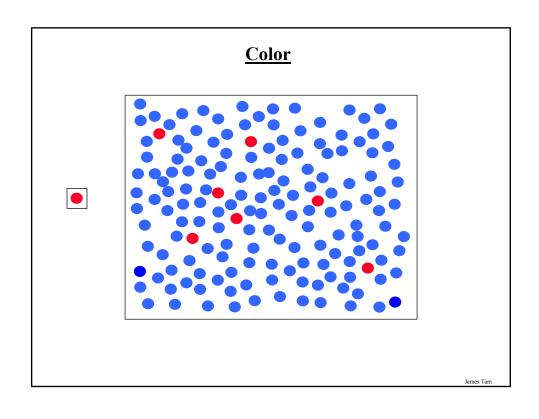




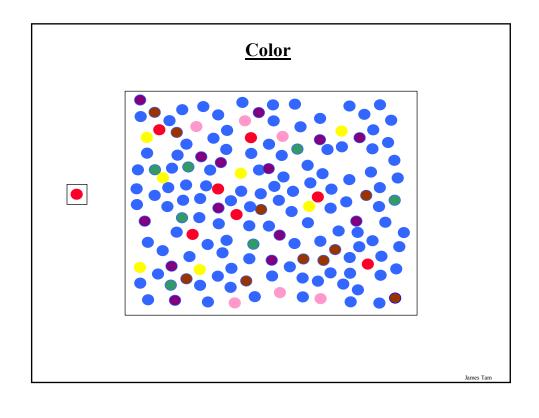


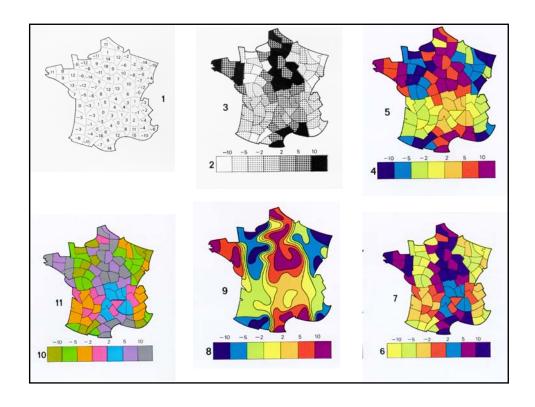


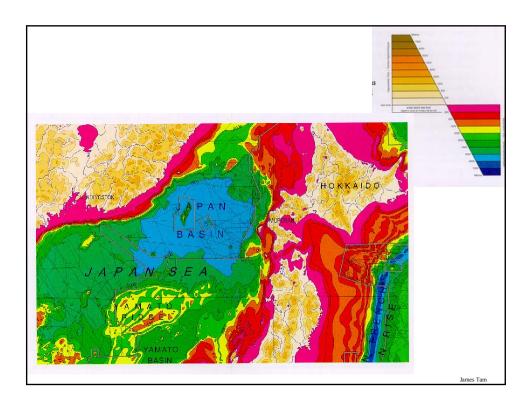


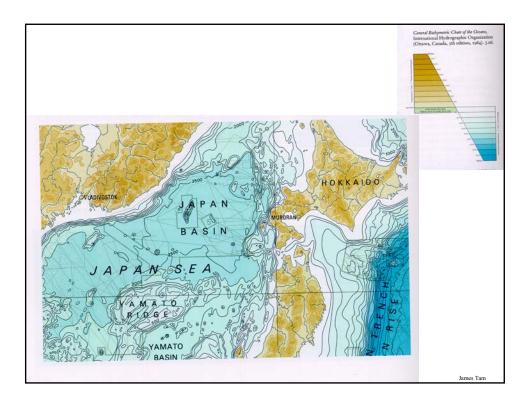


Common advice says use a rainbow scale • Marcus, Murch, Healey • There are problems with rainbows









Additional Issues Associated With Color

Color blindness:

• The majority of people who are color blind are red-green color blind so these colors should be avoided when communicating information.

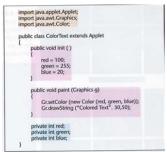
Field size

- The larger the area to be color coded, the more easily that colors can be distinguished.
- When objects are small and color is used to distinguish the colors use highly saturated colors.

Additional Issues Associated With Color (2)

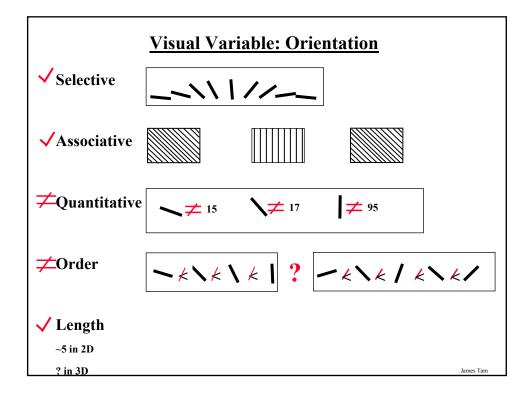
Field Size (continued)

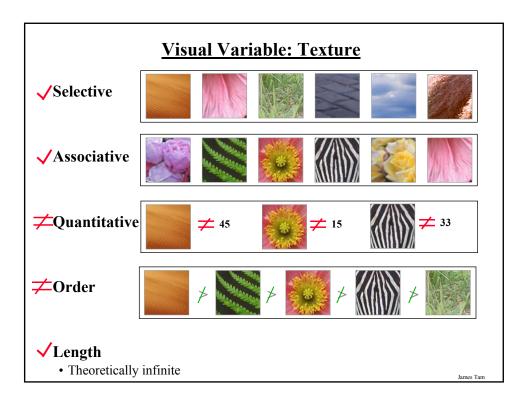
• When large color coded regions are used (e.g., maps) use colors with low saturation (reduces interference with detailed information e.g., text)



Conventions

•"Commonly accepted" conventions can vary widely by culture and their use should be carefully considered e.g., white is associated with purity in some Western cultures and death with some Eastern cultures.





Visual Variable: Motion

✓ Selective - motion is one of our most powerful attention grabbers



✓ **Associative** – objects moving in unison groups them effectively



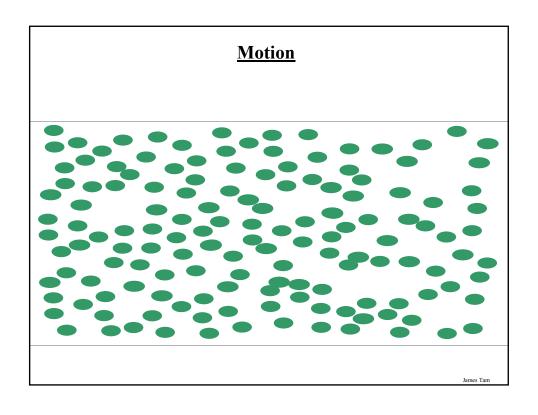


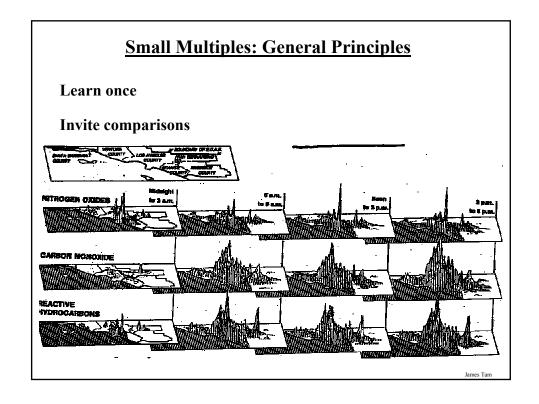


≠Quantitative - subjective perception

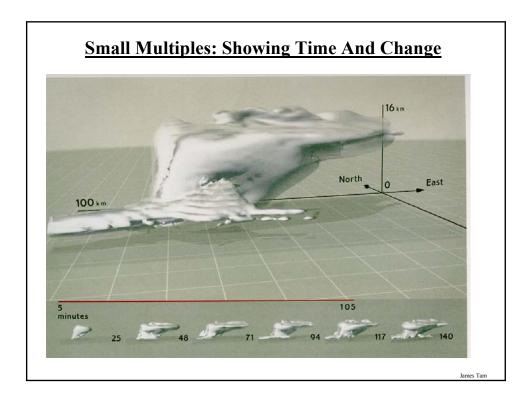
≠Order

? Length - distinguishable types of motion?





Small Multiples: Showing Time And Change 1:45:52



Metaphors

Definition of a Metaphor

- One kind of object or idea is used in place of another to suggest a likeness or analogy between them
- Application of name or descriptive term to an object to which it is not literally applicable

James Tam

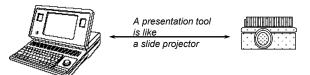
Interface Metaphors

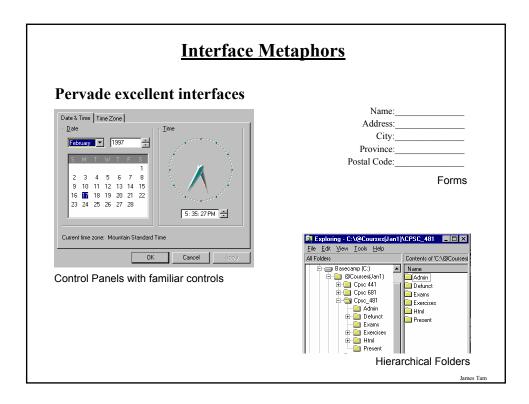
Purpose

- Function as natural models
- Leverages our knowledge of familiar, concrete objects/experiences to understand abstract computer and task concepts

Problem

• Metaphor may portray inaccurate or naive conceptual model of the system





A Real Life Metaphor: Life!



The Sims House Party © Maxis

James Tar

Creating Interface Metaphors

Generating metaphors

- Use metaphors that matches user's conceptual task
 - —Desktop metaphor for office workers
 - -Paintbrush metaphor for artists...
- Given a choice, choose the metaphor close to the way the system works
- Ensure emotional tone is appropriate to users
 - e.g., file deletion metaphors

Trashcan

Black hole

Paper shredder

Pit bull terrier

Nuclear disposal unit...

James Tan

Evaluating Metaphors

Potential problems:

- The metaphor has attributes that the system does not have.
- The system has attributes that are not suggested by the metaphor.
- An attribute exists both in the metaphor and in the system but works differently in each.

The Metaphor Is More Powerful Than The System

Will the metaphor make people believe that the system can do more than it currently can?

```
ZORK I: The Great Underground Empire
Copyright 1982 by Infocom, Inc.
All rights reserved.
ZORK is a trademark of Infocom, Inc.
Release 30 / Serial number 830330

West of House
You are standing in an open field west
of a white house, with a boarded front
door.
There is a small mailbox here.

>
```

Zork © Infocom

The System Is More Powerful Than The Metaphor Implies

Will the metaphor restrict how people will try to use the system?

• e.g., file folders



An Attribute Differs Between The Metaphor And The System

e.g., The trash can





Desk top trashcan

lames Tam

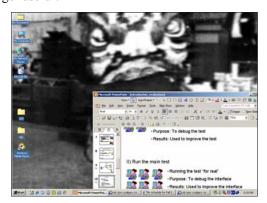
Metaphors Should Not Be Static

Evolve metaphors

- Is metaphor extensible to new features?
- When is the metaphor no longer useful?



Dilbert © United Features Syndicate

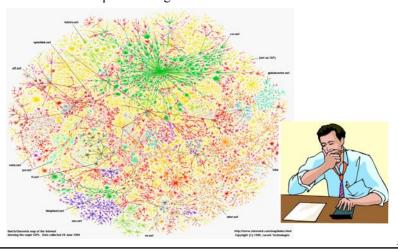


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Metaphors Should Not Be Static (2)

Evolve metaphors

- Is metaphor extensible to new features?
- When is the metaphor no longer useful?



Misuse Of Metaphors

Caveat

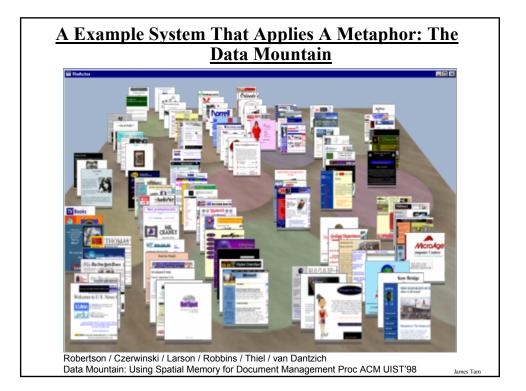
• Metaphors can be overdone!

Common pitfalls

- Overly literal
 - Unnecessary fidelity
 - Excessive interactions
- Overly cute
 - Novelty quickly wears off
- · Overly restrictive
 - Capabilities suggested by the metaphor don't match the actual capabilities
- Mismatched
 - Does not match user's task and/or thinking







A Example System That Applies A Metaphor: The <u>Data Mountain</u>

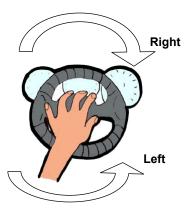


Robertson / Czerwinski / Larson / Robbins / Thiel / van Dantzich Data Mountain: Using Spatial Memory for Document Management Proc ACM UIST'98

lames Tam

Manipulating Real World Objects

Example steering a car:



Direct mapping between the driver's actions and how the car reacts.

Objects of interest are visible

- · Steering wheel
- The world outside of the car

Imagine: Operating A Car In A Indirect Fashion

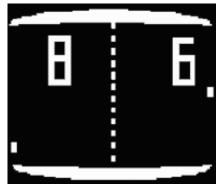


> Select: steering wheel, rotate left -30d

James Tam

Direct Manipulation

- •An interface that behaves as though the interaction was with a real-world object rather than with an abstract system
- •Almost always based on a metaphor
 - Mapped onto some facet of the real world task semantics



Ping was created by Nolan Bushnell

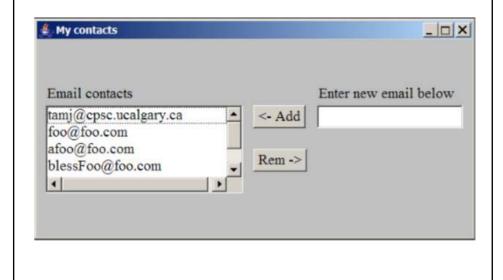
lames Tam

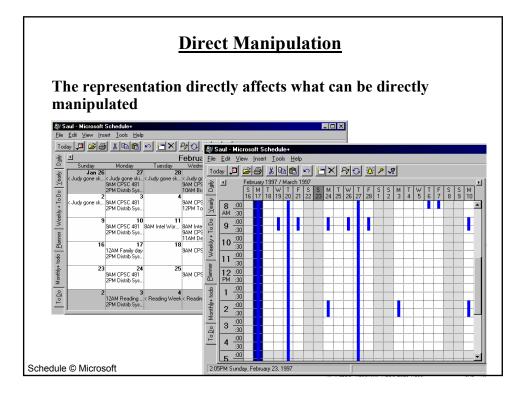
Characteristics Of Direct Manipulation

- •Objects of interest are visible
- •When it is logical: visible objects can be manipulated
- •Manipulation occurs by pointing and moving

James Tam

Indirect Interaction: Traditional Approach To Writing Java GUI's





Is Direct Manipulation The Way To Go?

Some Disadvantages

- Ill-suited for abstract operations or for vision impaired users
 - Spell-checker?
- Tedium
 - Manually search large database vs. query
- Metaphor may be misleading:
 - Overly restrictive or imply functions that aren't available
- Direct manipulation systems require more screen space

Solution

- Most systems combine direct manipulation and abstractions
 - Word processor:

WYSIWYG document (direct manipulation) buttons, menus, dialog boxes (abstractions, but direct manipulation "in the small")

James Tan

Conventional Applications: A Mix | Mix |

Direct Engagement

- •The feeling of working directly on the task (as opposed to using a particular tool).
- •To employ it, you need to consider the user of the system and the tasks that he or she engages in.
- •Often direct manipulation is an important requirement for direct engagement.
 - e.g., A drawing program provides tools that are familiar to artists (brushes, palettes etc.)

James Tan

Direct Engagement: A Telephone Database

Find "Green"
>S. Greenberg
>Dept Computer Science
>University of Calgary

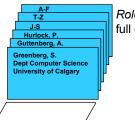
Command system no direct manipulation

Search for: Green

Result: S. Greenberg

Dept Computer Science University of Calgary

Form metaphor: syntactic direct manipulation



Rolodex metaphor: full direct manipulation

Action-Object

The traditional approach for writing software.

Focus on verbs, actions or functions that the software is capable of.

Often requires learning a complex and arbitrary syntax that varies greatly from system to system and platform to platform:

• e.g., Deleting text: <Ctrl>-<h>, <ctrl-g>, <ctrl-d>, <delete>, <backspace> etc.

James Tam

Object-Action

- Focus on nouns, objects which already have meaning in the task domain of the user.
- •Select an object which then has a set of allowable actions.



- •Because the user is already familiar with these objects, previous knowledge can help leverage when learning the new systems:
 - •e.g., Trash cans for deletion, folders for storing information, inbox for reading new messages, outbox for sending messages
- •It requires that the objects of interest have a visual representation (compatible with Direct Manipulation)

Advantages Of The Object-Action Approach

- The syntax is already familiar so the time spent learning the capabilities of the system is reduced.
- •The new syntax that the user is required to learn is fairly limited e.g., there are only so many ways that a button can be used.
- •Error messages are rarely needed. Actions that are inappropriate, given the current state of system, can be excluded:



The Sims House Party @ Maxis

James Tam

What You Now Know

Good Representations

- Captures essential elements of the event / world
- Deliberately leaves out / mutes the irrelevant
- Appropriate for the person, their task, and their interpretation

Information Visualization

- Tufte's principles
- Exploits our knowledge of visual variables
- Many techniques now available (illustrated with research and commercial systems)

What You Now Know (2)

Metaphors

- Uses our knowledge of the familiar and concrete to represent abstract concepts
- Need not be literal
- · Has limitations that must be understood

Direct manipulation

- Visibility of the objects of interest
- Manipulation by pointing and moving

These four components are the foundation of a true Visual Interface

