

# VizRec 2.0: Towards a holistic workflow for visual data exploration \*

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## Abstract

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## 1 Introduction

With the ever-increasing complexity and size of datasets, there is a growing demand for information visualization tools that help analysts make sense of large amounts of data. Visual data exploration is one of the most commonly used technique that powerfully couples human insights with statistical and data management solutions to help analysts rapidly generate hypothesis, discover interesting trends and patterns, and identify clusters and anomalies. In this paper, we present challenges in the various stages in the cycle of visual analysis, and discuss ongoing and future directions of research that addresses these issues.

Our paper focuses on ongoing research in interactive systems that guides users through the acts of visual data exploration as shown in Figure 1, including searching for a precise visualizations, querying with a vague intent, and recommending visualizations that facilitates better data understanding and awareness. Our presentation of the spiral in Figure 1 does not imply a monotonic sequences of actions, nor are the acts of visual data exploration mutually exclusive from one another, instead the diagram should read as a series of workflow that interleaves and forms an iterative cycle that reinforces one another. For example, as we will discuss in Section 3, better data understanding can lead to better precise visual querying behaviors.

Starting from the innermost spiral, we discuss how precise visual query systems help accelerate the process of finding desired visualizations. Precise visual query system addresses the common problem of having to manually examine large numbers of visualizations in search of a desired pattern, which can be error-prone and inefficient. We discuss our work on *zenvisage* which allows analysts to specify their desired visualization through front-end interactions and automatically returns a ranked list of visualizations that closely matches with the input query.

In Section 2, we highlight examples from our *zenvisage* design study where precise querying alone is insufficient for addressing all the visual querying demands required in real-world use cases. In addition, we find that users often do not have a good idea of what they want to query for without looking at example visualizations or summaries of the data. To improve the flow of visual data exploration, we advocate to make visual query system

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**Bulletin of the IEEE Computer Society Technical Committee on Data Engineering**

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\*Doris: need a better title

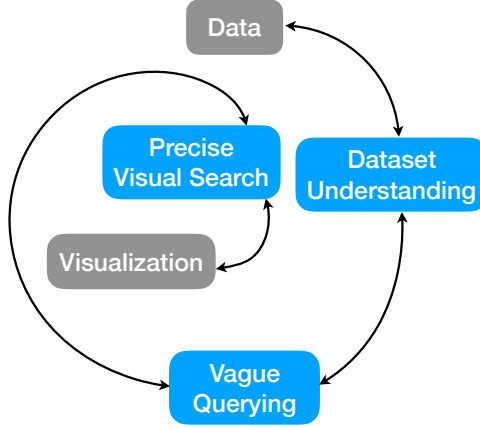


Figure 1: Cycle of visual data exploration.

more expressive by supporting a wider class of vague queries (Section 4) and make it easier to know what to query by recommending visualizations that facilitate data awareness (Section 5).

Section 4 explains why the trade-off between expressiveness and usability in most interactive analytics system is an inherent challenge in making visual query systems more expressive. We discuss a growing class of *intelligent visual querying system* (IVQS) that tries to interpret the ‘vagueness’ of queries and allow users to tweak or refine their queries through a feedback mechanism.

To address the problem of guiding users to portions of the data that they might be interested in querying, Section 5 introduces systems that help users become more aware of their dataset and visualize where they are in their analysis workflow. The challenge in building these systems involves understanding what types of visualizations should be recommended to facilitate data awareness. As an example, we describe our work on STORYBOARD, a system that provides data summaries and guides users through informative subsets of data. Finally, we discuss related works on how visualizing provenance and situational information can guide users towards more informative analysis actions.

## 2 Precise Visual Querying

While visual analysis often reveal important anomalies or trends in the data [10, 16], it is often challenging to choose the right piece of data to visualize in order to realize these insights. In this section, we first motivate the use case for visual query systems and describe *zenvisage* as an example of such a system built to address these challenges.

### 2.1 Motivating Example

Astronomers from the the Dark Energy Survey (DES) are interested in finding anomalous time series to discover astrophysical transients (objects whose brightness changes dramatically as a function of time), such as supernova explosions or quasars [5]. When trying to find celestial objects corresponding to supernovae, which have a specific pattern of brightness over time, scientists need to individually inspect the visualizations of each object until they find ones that match the pattern. With more than 400 million objects in their catalog, each having their own set of time series brightness measurement, the process of manually exploring a large number of visualizations is not only error-prone, but also overwhelming for scientists who do not have extensive knowledge about their dataset.

The astronomy use case highlights a common challenge in exploratory data analysis (EDA). There is often a large space of possible visualizations that could be generated from a given dataset and manual search through this large collection is inefficient. Popular visualization authoring tools such as Tableau and Excel focus on presenting one visualization at a time and there is no systematic way to create, compare, and query large collections of visualizations.

## 2.2 Effortless Data Exploration with *zenvisage*

The challenges discussed in the previous section point to the need for a tool that enables users to create and search through large collections of visualizations. To this end, we developed *zenvisage*, a *precise visual querying system* (PVQS) that accepts precise queries in the form of a desired pattern specified through frontend interactions and returns a ranked list of visualizations that look similar to the input pattern [25]. *zenvisage* is built on top of a querying language called ZQL, which provides a mechanism for managing collections of visualizations. Contrary prior work on visualization languages for specifying visual encodings of individual visualizations [26, 28], ZQL supports high-level queries over visualization collections, such as composing, sorting, filtering a collection of visualization. ZQL functionals and primitives can be constructed into rich and expressive query semantics, with functionalities including:

- Finding top-k visualizations whose y values are most or least similar from a queried visualization. (e.g. Find cities with sold price over time similar to Manhattan. Varying along CITY while keeping X = TIME, Y = AVG(PRICE) fixed.)
- Comparing across a collection of visualizations by iterating over one or more x, y, z attributes while fixing other attributes. (e.g. Find an y attribute that varies with time similarly how average price changes over time)
- Finding a pair of X and Y axes where two specific visualization instances differ the most. (e.g. Finding pairs of attributes where visualizations for the products ‘stapler’ and ‘chair’ differ the most.)

Given a ZQL query, *zenvisage* parses the query into a graph of visual component nodes (containing visualization information, such as X, Y columns) and task nodes (common and user-defined primitives for processing visual components, such as sort or filter). *zenvisage* then performs query optimization to merge together multiple nodes, as well as reducing the processing time required for individual visualization components. Using the optimized query plan, the executor compiles visual nodes into SQL queries for retrieving the visualization data and postprocesses the result via the defined operations.

While ZQL provides powerful mechanism for expressively specifying queries on large collections visualizations, writing ZQL queries can be daunting for novice users. Therefore, we extracted a typical workflow of visualization querying (finding top-k most similar visualization from a collection with fixed X,Y while varying Z) to allow users to formulate ZQL queries through interactions. The user can either perform frontend interactions mapped onto ZQL queries or directly input ZQL queries through a table input. The query results are rendered as a ranked list of visualizations in the results panel in the interface. *zenvisage* is a full-fledged visual querying system that supports a variety of querying interactions as illustrated in Figure 2. In the following section, we will discuss the design process of the interactions in this precise visual query system and the lessons that we have learned for designing future visual data exploration systems.

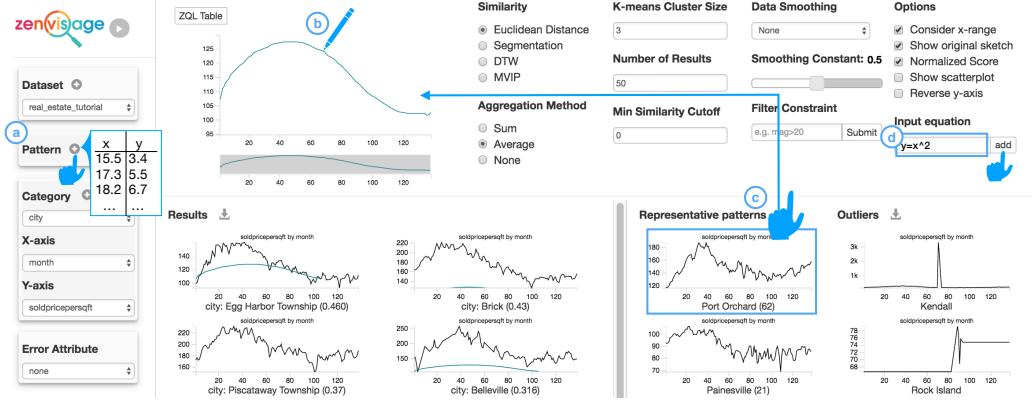


Figure 2: *zenvisage* offers a variety of querying modalities, including: a) uploading a sample pattern from an external dataset as a query, b) sketching a query pattern, c) dragging-and-dropping an existing pattern from the dataset, and d) inputting an equation as a query.

### 3 Hypothesis Formation and the cycle of visual analysis

#### 3.1 Visual Querying in the *Sensemaking Framework*

In developing *zenvisage*, we collaborated with scientists from astronomy, genetics, and material science in a year-long participatory design process [14]. In particular, we studied how various features impact analysts' ability to rapidly generate new hypotheses and insights and perform visual querying and analysis. We employed Pirolli and Card's information foraging theory to contextualize our study results [20]. Our findings not only offers design guidelines for improving the usability and adoption of next-generation PVQSSs, but more importantly, points towards the need for supporting other components in the cycle of visual data exploration.

#### 3.2 The Problem of Vague and Complex Visual Queries

When users query with a PVQS, they often translate their ambiguous, high-level questions into an plan that consists of multiple interactions to incrementally address their desired query. Participants in our *zenvisage* design study often created unexpected workflows that chained together analysis steps consisting of multiple interactions and controls. For example, geneticists in our study repeatedly explored representative trends to gain an overall sense of the typical profiles that exist in their dataset and queried mainly through drag-and-drop of these representative trends. Variations to their main workflow also include changing cluster sizes and display control settings to offer them different perspectives on the dataset.

The expressiveness of PVQSSs comes from the multiplicative effect of stringing together combinations of interaction sequences into a customized workflow. Designing features that diversifies potential variations expands the space of possible workflows that could be constructed during the analysis. However, even with many supported interactions, there were still vague and complex queries that could not be decomposed into a multi-step interaction workflow. In Section 4, we highlight the challenges of PVQSSs in supporting vague and complex queries and several promising directions of ongoing research in this area.

#### 3.3 The Problem of Prescriptive Visual Querying

Pirolli and Card's notional model distinguishes between information processing tasks that are *top-down* (from theory to data) and *bottom-up* (from data to theory) [20]. In the context of visual querying, users employ top-down approaches by starting with a hypothesis on what patterns to look for and express it through sketching

or inputting an equation (Figure 2b,d). On the other hand, bottom-up approaches originate from the data (or equivalently, the visualization). For example, the user may drag and drop a visualization of interest in the dataset as the input query or upload a visualization from an external dataset (Figure 2a,c). These two modalities of querying are reminiscent of the browsing and searching behaviors on the Web, which derives from the successful application of foraging theory to Web Search [18].

While the usage of each querying feature may vary from one participant to the next, our interactions with the scientists showed that *bottom-up querying via drag-and-drop was more intuitive and more commonly used than top-down querying methods when the users have no desired patterns in mind*, which is commonly the case for exploratory data analysis. One of the main reason why participants did not find sketching useful was that they often do not start their analysis with a pattern in mind. Later, their intuition about what to query is derived from other visualizations that they see in the PVQS, in which case it made more sense to query using those visualizations as examples directly. Similarly, while functional fitting is a common operation in scientific data analysis, querying by equation is also unpopular, since it is challenging to formulate functional forms in an prescriptive, ad-hoc manner without seeing what the common patterns in the dataset are.

A key design principle that came from this study was the need for visualization recommendations that can help analysts jump-start their exploration. For example, we found that many users made use of the recommended representative trends and outliers visualizations provided by *zenvisage* as contextual information to better understand their data or to query based on these recommended visualizations.

As evident from the representative and outliers visualization recommendations in *zenvisage*, recommendations facilitate a smoother flow of analysis by closing the loop between the two modalities of querying and exploration, thus ensuring that user is never stuck or out of ideas at any point during the analysis. Typically, visualization recommendation systems seeks to accelerate the process of discovering interesting aspects of the data by broadening exploration. In Section 5, we advocate recommendation systems should not only focus on data discoverability aspect of exploration, but also contribute towards helping users become more aware of the distributions in their data and the context of their analysis.

## 4 Towards Intelligent Visual Search

### 4.1 The Challenge of Usability-Expressivity Tradeoff

The challenge for supporting vague and complex querying stems from the inevitable design trade-off between query expressivity and interface usability in interactive data exploration systems [12, 16]. This tradeoff is observed not only in visual data exploration systems, but also true for general ad-hoc data querying. While querying language such as SQL are highly expressive, formulating SQL queries that maps user’s high-level intentions to specific query statements is challenging [12, 13]. As a result, query construction interfaces have been developed to address this issue by enabling direct manipulation of queries through graphical representations [1], gestural interaction [17], and tabular inputs [33, 6]. For example, form-based query builders often consist of highly-usable interfaces that ask users for a specific set of information mapped onto a pre-defined query. However, form-based query builders are often based on query templates with limited expressiveness in their semantic and conceptual coverage, which makes it difficult for expert users to express complex queries. The extensibility of these systems also comes with the high engineering cost, as well as potentially overloading the users with too many potential options to chose from. There is a need for tools that is enables users to formulate rich and complex queries, yet highly usable even for novices.

### 4.2 Ongoing research and opportunities

Given the tradeoff between expressivity and usability, we can not assume a one-size-fit-all PVQS that could fit the needs for users of different expertise levels and workloads. In this section, we discuss a growing class

of *intelligent visual querying system* (IVQS) that works around this problem by taking into account queries of varying degrees of input specificity. We describe three different system challenges in interpreting non-precise queries. Since most visual query systems operates on top of a querying language, we use the linguistical classification scheme to provide an analogy for where the ambiguous aspects of queries may arise during visual data exploration, noting that the use of this analogy by no means limits our analysis to only natural language interfaces.

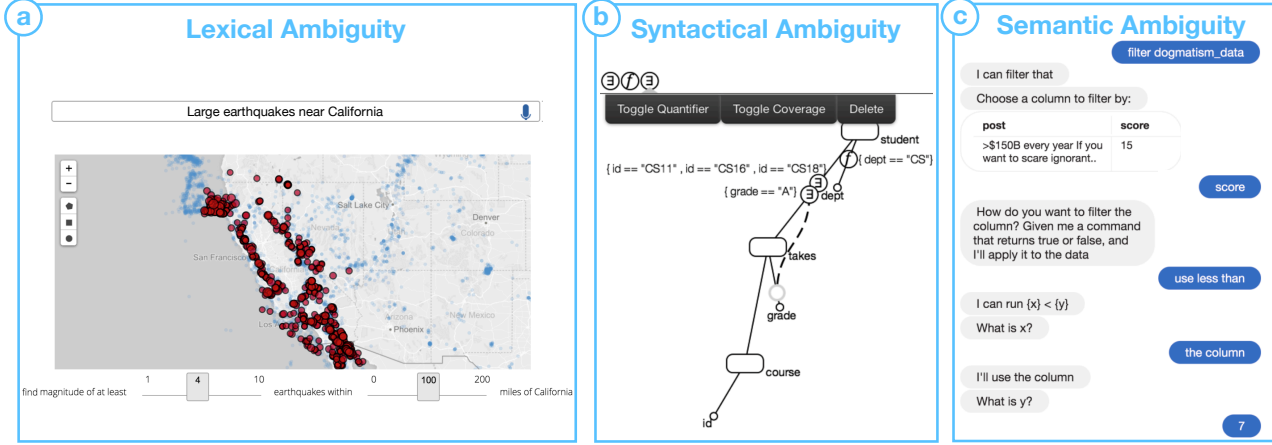


Figure 3: Examples of IVQSs: a) Eviza [24] uses ambiguity widgets to enable users to clarify vaguely-defined terms in their input query to resolve lexical ambiguity; b) DataPlay [1] allow users to toggle between ‘for all’ and ‘at least one’ quantifier to control for syntactical ambiguity; c) Iris [7] accepts a vague high-level task description and gather the additional information required through follow-up questions in a nested conversation. **Doris: I’ve taken these as screenshot from other people’s papers. Are we allowed to take screenshots from other people’s papers or do we need to ask them for permission, given that we’ve cited the source?**

**Lexical Ambiguity:** Lexical ambiguity involves the use of vague descriptors in the input queries. For example, *zenvisage* was unable to support high-level queries that involved the use of vague descriptors for matching to specific data characteristics, such as finding light curves that are flat and ‘without noise’, or patterns that ‘exhibits irregularities’. These scenarios showcase examples of lexical ambiguity, where the PVQS can not map the vague term ‘irregular’ or ‘noisy’ into the appropriate series of analysis steps required to find these patterns. Resolving these lexical ambiguities has been a subject of research in natural language interfaces (NLIs) for visualization specification, such as DataTone [8] and Eviza [24]. These NLIs detects ambiguous quantifiers in the input query (e.g. “Large earthquakes near California”), and then displays ambiguity widgets in the form of a widget to allow users to specify the definition of ‘large’ in terms of magnitude and the number of miles radius for defining ‘near’, as shown in Figure 3a. These ambiguity widgets not only serve as a way to provide feedback to the system for lexically vague queries, but also is a way for displaying interpretable explanations of how the system is interpreting the input queries. If we consider IVQSs as a layer on top of PVQS (that performs functionalities such as shape-matching, filtering), an IVQS resolves lexical ambiguity by determining the appropriate *parameters* to the PVQS to achieve the user’s desired querying effects.

**Syntactic Ambiguity:** Syntactic ambiguity is related to the vagueness in specifying how the query should be structured or ordered. For example, DataPlay introduced the idea of syntax non-locality in SQL, in which switching from an existential (at least one) to a universal (for all) quantifier requires major structural changes to the underlying SQL query [1]. As shown in Figure 3b, DataPlay consist of a visual interface that allowed users to directly manipulate the structure of the query tree in tweaking the query to its desired specification. IVQSs resolve syntactic ambiguities either by mapping portions of the vague queries into to *a series of multi-*

*step workflows* to be executed in the PVQS and allow users to tweak the query representation directly. The query modification is done in a declarative manner in that the underlying mechanism in which the visualized workflow gets translated to the querying language is largely hidden from the end-user.

**Semantic Ambiguity:** Semantic ambiguity arises when the user does not specify their intent completely or explicitly, which is often the case in the earlier stages of the visual data exploration. NLI for visual data exploration such as Evizeon [11] makes use of anaphoric references to fill in incomplete follow-on queries. For example, when a user says ‘Show me average price by neighborhood’, then ‘by home type’, the system interprets the anaphoric reference as continuing the context of the original utterance related to average price on the y-axis. Semantic ambiguity can often be composed of one or more lexical and syntactical ambiguity. For example, in Iris [7], a user can specify a vague, high-level query such as ‘Create a classifier’, then Iris makes use of nested conversations to inquire about what type of classifier to choose and what features to use in the model to fill in the details of the structure and parameters required. A semantically vague query may or may not be expressible through a single PVQS, since the operations involved in the query may not be covered by the limited workflow combinations in the PVQS.

## 5 Towards Dataset Understanding

While our focus in the previous sections have focused on intention-driven queries, where users have some knowledge of what types of questions they may be interested in, one of the key goals of visual data exploration is to promote a better understanding of the dataset to enable users to make actionable decisions. This section discusses systems that help users become more aware of their dataset and visualize where they are in their analysis workflow. Such systems can often be useful in situations where there is an absence of explicit signals from the user, which can happen when a user is at the beginning of their analysis (commonly known as the ‘cold-start’ problem) or when the user doesn’t know what to query for, as exemplified in our *zenvisage* study in Section 3. In this section, we will describe STORYBOARD, a system that provides data summaries and guides users through informative subsets of data, as an example of a system that promotes distribution awareness in a query-free scenario. Then, we will discuss other types of data understanding during dynamic visual data exploration to highlight the challenges and opportunities ahead in this space.

### 5.1 STORYBOARD: Promoting Distribution Awareness of Data Subsets with Summary of Visualizations

Common analytics tasks, such as causal inference, feature selection, and outlier detection, require understanding the distributions and patterns present in the visualizations at differing levels of data granularity [2, 10, 31]. However, it is often hard to know *what* subset of data contains an insightful distribution to examine. In order to explore different data subsets, an analyst would first have to construct a large number of visualizations corresponding to all possible data subsets, and then navigate through this large space of visualizations to draw meaningful insights. While there are some related work in database literature in constructing informative summaries that help guide users through the complex schema of object-oriented databases [15, 32], these are often focused on table and attribute level information, rather than information about derived from the actual data distributions. The lack of a systematic way to perform these exercises makes the process of manually exploring distributions from all possible data subsets tedious and inefficient [21, 22].

To this end, we developed STORYBOARD, an interactive visualization summarization system that automatically selects a set of visualizations to summarize the distributions within a dataset in an informative manner. Figure 4 illustrates an example dashboard generated by STORYBOARD from the Police Stop Dataset [19], which contains records of police stops that resulted in a warning, ticket, or an arrest. The attributes in the dataset include driver gender, age, race, and the stop time of day, whether a search was conducted, and whether contra-

band was found. We requested STORYBOARD to generate a dashboard of 9 bar chart visualizations with x-axis as the stop outcome (whether the police stop resulted in a ticket, warning, or arrest/summons) and y-axis as the percentage of police stops that led to this outcome. First, at the top of our dashboard, STORYBOARD highlights three key data subsets that results in a high arrest rate, which looks very different trend than the overall (where the majority of stops results in tickets). Following along the leftmost branch, we learn that even though in general when a search is conducted, the arrest rate is almost as high as ticketing rate, when we look at the Asian population, whether a search is conducted had less influence on the arrest rate and the trend resembles more like the overall distribution.

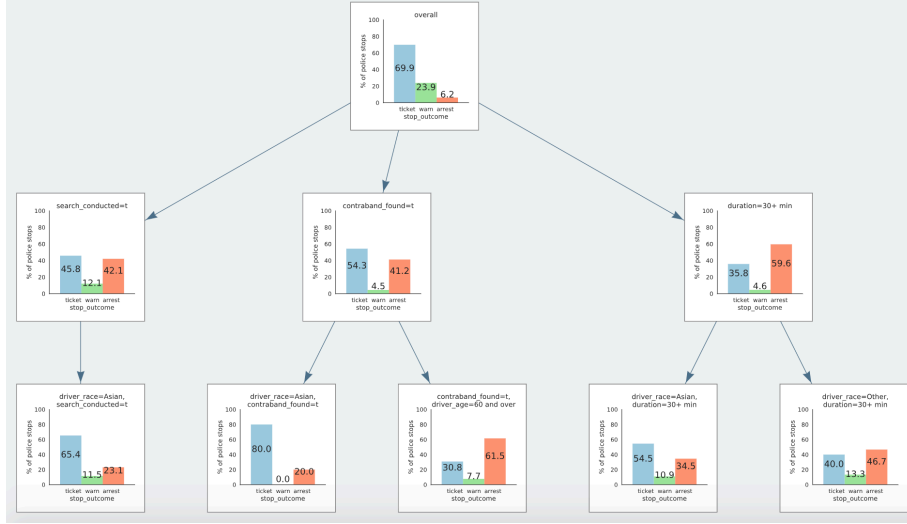


Figure 4: Example dashboard generated by STORYBOARD summarizing the key insights in the Police dataset.

While such summary dashboards are useful for making sense of relationships between data subsets, finding effective visualizations to summarize a dataset is not as trivial as picking individual visualizations that maximizes some statistical measure, such as deviation [27], coverage [23], or significance testing [2], which can often result in misleading summarizations. The key idea behind our work is understanding how analysts formulate their expectations regarding an unseen visualization in a *data subset lattice*. Applying the idea of data subset lattice from data cube literature [9] to filtered bar chart visualizations, we define a visualization as the *parent* of another visualization if the latter visualization can be derived from the first visualization by adding one additional filter constraint. Our formative user study showed that people naturally form their expectations regarding an unseen visualization based on one or more observed parents and that seeing a parent that well describes the unseen visualization leads participants to better estimate the unseen visualization. More importantly, in the absence of an informative parent or in the presence of multiple parents, participants can be misled to form an inaccurate expectation that exhibit higher variance.

Given these insights, the goal of our system is to select *interestingness* and *informativeness* visualizations that can help them make more accurate predictions regarding the unseen visualizations. To model the informativeness of an observed parent in the context of an unseen visualization, we characterize the capability of the parent in predicting the unseen visualization. Our study shows that a visualization is *informative* if its data distribution closely follows the data distribution of the unseen child visualization, since the visualization helps the analyst form an accurate mental picture of what to expect from the unseen visualization. While informative parents contribute to the prediction of an unseen visualization, the most interesting visualizations to recommend are those for which *even the informative parents fail to accurately predict or explain the visualization*. Our problem of constructing the summary dashboard then becomes the problem of finding the  $k$  connected visualizations that are most informatively interesting according to this objective. Detailed treatments of our metrics



and algorithms can be found in our technical report. Doris: (CITE PLACEHOLDER) Can we put a version of the STORYBOARD paper on arxiv so that we can cite it?

The effectiveness of STORYBOARD largely comes from how the summary visualizations help analysts become more distributionally aware of the dataset. We define *distribution awareness* as the aspect of data understanding in which analysts make sense of the key distributions across different data subsets and their relationships in the context of the dataset. With distribution awareness, even though it may be infeasible for an analyst to examine all possible data subsets, the analyst will still be able to draw meaningful insights and establish correlations about related visualizations by generalizing their understanding based on the limited number of visualizations presented in the dashboard. Our evaluation study shows that facilitating distribution awareness through STORYBOARD guides analysts to make better predictions regarding unseen visualizations, ranking attribute importance, and retrieval of interesting visualizations compared to dashboards generated from the baselines.

## 5.2 From Distributional to Contextual Awareness: Challenges and Opportunities

The notion of distribution awareness is useful when considering the scenario at one static point in time of the analysis, such as during cold-start. In this section, we introduce a complementary notion of data understanding called *contextual awareness*, which is essential when considering a dynamic analytic workflow for visual data exploration.

Contextual awareness is the aspect of data understanding related to the *situation* (what is the information that I’m currently looking and how did it come about?) and *provenance* (what have I explored in the past and where should I look next?) of data. Situational understanding involves recognizing what data is in the current scope of analysis, including making sense of the data attributes and schema and keeping track of what filter or transformations have been applied to the displayed data. Provenance understanding is associated with the analyst’s past analysis actions on the data. As an example, an analyst may be interested in how the sales price of a product changes as a function of other dimensions variables, such as geographic location, year sold, and product type. Situation information informs him that he is looking at a bar chart with  $x=TYPE$ ,  $y=AVG(PRICE)$ , whereas provenance information points to the fact that he should explore the geographic dimension, since he has already explored the temporal attribute YEAR.

Within a dataset, provenance is essential in helping users navigate through the space of possible analysis actions and provide users with sense of coverage and completion. While the problem of data provenance has been well studied in database literature [3, 4, 30], the effects of showing provenance information to users during data analysis is an important but underexplored area. The notion of adding navigational cues to guide exploration in visual information spaces was first proposed in Willet et al.’s work on *scented widgets* [29]. In Pirolli and Card’s theory of information foraging, scents are cues that signifies the perceived benefit that one would receive during a search. Scented widgets adds to existing search interfaces by embedding visualizations that provide informational scents, such as histogram distributions of how popular a particular value is among users or using color to encode the size of a dataset in a drop-down menu. Recently, Sarvghad et al. have extended the idea of scented widgets to incorporate dimension coverage information during data exploration, including which dimensions have been explored so far, in what frequency, and in which combinations [23]. Their study shows that visualizing dimension coverage leads to increased number of questions formulated, findings, and broader exploration. Interpretable and non-disruptive cues that enables users to visualization provenance history helps sustain contextual awareness and guides users towards more informative next steps in their analysis.

Mechanisms that facilitate distribution awareness for users can effectively couple with contextual awareness in dynamic exploration situations to help update the user’s mental model on the current data context. For example, the representative and outlier patterns in *zenvisage* provides summaries of data in context. When a dataset is filtered, the representative trends are updated accordingly. By being aware of both the context and the distributions, the users becomes distributionally aware of how the typical patterns and trends of the distributions changes in a particular context.

While our discussion above have been focused on how to design systems that can help facilitate these aspects of user’s awareness in dataset understanding, these ideas can be generalized to principles in designing IVQS discussed in Section 4. An IVQS needs to be distributionally and contextually aware, by make use of information about the data (distribution awareness), the analytic context, and situation jointly in making timely recommendations. In other words, these systems should not only facilitate these aspects of data awareness, but also need to make use of this information to make recommendations that can guide analysts towards meaningful stories and insights for further investigation.

## 6 Concluding Remarks

Datasets are agnostic to visual data exploration

In this paper, we advocate supporting a desiderata consisting of 3 ‘T’s in the cycle of visual data exploration:

- **Informative:** Section 2 discusses how precise visual query systems provide informative visualizations to accelerate the process of data discovery.
- **Interactive and iterative:** Section 4 Joining the flow, query refinement, dialogue (not a one-shot query), feedback and recommendation, expressivity (how easy is it to express what to do via interactions) and diversity of actions that could be performed.
- **Integrated:** Section 5 discusses the challenges and opportunities in moving from intention-driven querying to facilitating more integrated data understanding and awareness during the analysis workflow.

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