### Workshop: Open Source Tools for Data Analysis and Visualization

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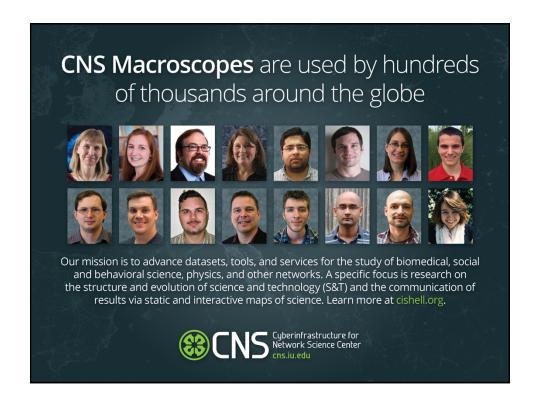
Science & Creativity Annual Conference (KOFAC)
Seoul, Korea

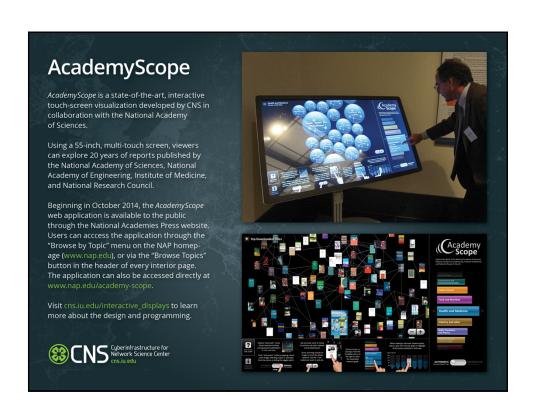
December 4, 2014



All papers, maps, tools, talks, press are linked from <a href="http://cns.iu.edu/docs/presentations">http://cns.iu.edu/docs/presentations</a>
These slides are available at <a href="http://cns.iu.edu/docs/presentations">http://cns.iu.edu/docs/presentations</a>

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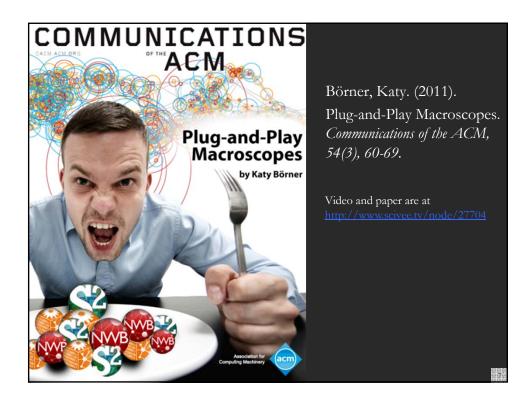












# Designing "Dream Tools"

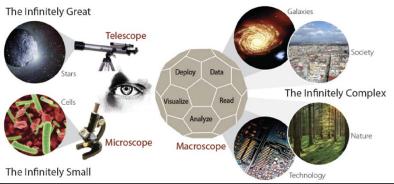
Many of the best micro-, tele-, and macroscopes are designed by **scientists** keen to observe and comprehend what no one has seen or understood before. Galileo Galilei (1564–1642) recognized the potential of a spyglass for the study of the heavens, ground and polished his own lenses, and used the improved optical instruments to make discoveries like the moons of Jupiter, providing quantitative evidence for the Copernican theory.

Today, scientists repurpose, extend, and invent new hardware and software to create "macroscopes" that may solve both local and global challenges.

CNS Macroscope tools **empower** me, my students, colleagues, and more than 100,000 others that downloaded them.

### **Macroscopes**

Decision making in science, industry, and politics, as well as in daily life, requires that we make sense of data sets representing the structure and dynamics of complex systems. Analysis, navigation, and management of these continuously evolving data sets require a new kind of data-analysis and visualization tool we call a macroscope (from the Greek macros, or "great," and skopein, or "to observe") inspired by de Rosnay's futurist science writings. Macroscopes provide a "vision of the whole," helping us "synthesize" the related elements and enabling us to detect patterns, trends, and outliers while granting access to myriad details. Rather than make things larger or smaller, macroscopes let us observe what is at once too great, slow, or complex for the human eye and mind to notice and comprehend.

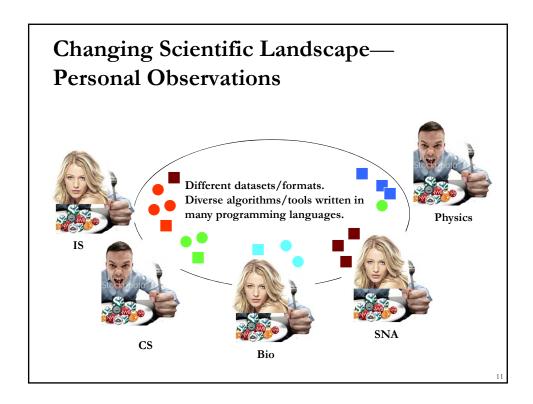


### Plug-and-Play Macroscopes

Inspire computer scientists to implement software frameworks that empower domain scientists to assemble their own continuously evolving macroscopes, adding and upgrading existing (and removing obsolete) plug-ins to arrive at a set that is truly relevant for their work—with little or no help from computer scientists.

While microscopes and telescopes are physical instruments, **macroscopes resemble continuously changing bundles of software plug-ins.** Macroscopes make it easy to select and combine algorithm and tool plug-ins but also interface plug-ins, workflow support, logging, scheduling, and other plug-ins needed for scientifically rigorous yet effective work.

They make it easy to share plug-ins via email, flash drives, or online. To use new plugins, simply copy the files into the plug-in directory, and they appear in the tool menu ready for use. No restart of the tool is necessary. Sharing algorithm components, tools, or novel interfaces becomes as easy as sharing images on Flickr or videos on YouTube. Assembling custom tools is as quick as compiling your custom music collection.



### Related Work

Google Code and SourceForge.net provide special means for developing and distributing software

- In August 2009, SourceForge.net hosted more than 230,000 software projects by two million registered users (285,957 in January 2011);
- In August 2009 ProgrammableWeb.com hosted 1,366 application programming interfaces (APIs) and 4,092 mashups (2,699 APIs and 5,493 mashups in January 2011)

Cyberinfrastructures serving large biomedical communities

- Cancer Biomedical Informatics Grid (caBIG) (http://cabig.nci.nih.gov)
- ➤ Biomedical Informatics Research Network (BIRN) (http://nbirn.net)
- Informatics for Integrating Biology and the Bedside (i2b2) (<a href="https://www.i2b2.org">https://www.i2b2.org</a>)
- HUBzero (<a href="http://hubzero.org">http://hubzero.org</a>) platform for scientific collaboration uses
- myExperiment (<a href="http://myexperiment.org">http://myexperiment.org</a>) supports the sharing of scientific workflows and other research objects.

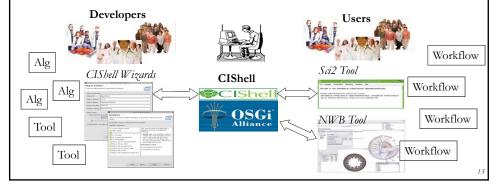
### Missing so far is a **common standard** for

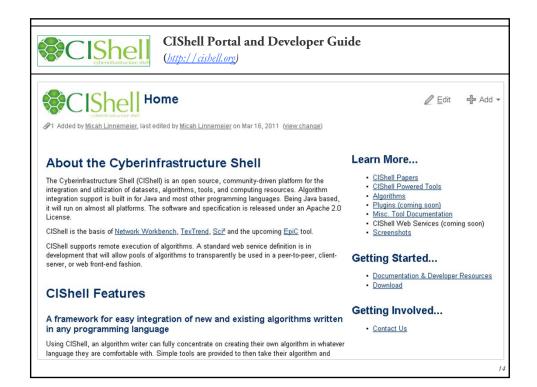
- the design of modular, compatible algorithm and tool plug-ins (also called "modules" or "components")
- that can be easily combined into scientific workflows ("pipeline" or "composition"),
- > and packaged as custom tools.

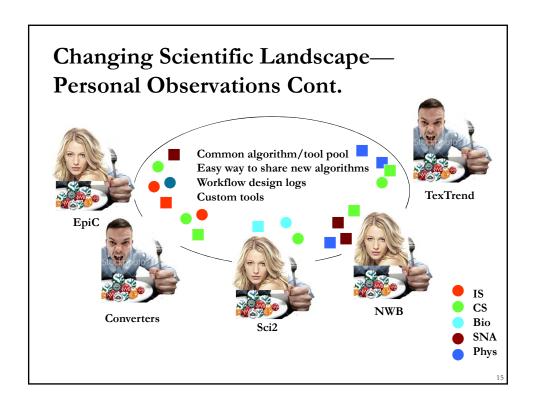


### OSGi & CIShell

- ➤ CIShell (<a href="http://cishell.org">http://cishell.org</a>) is an open source software specification for the integration and utilization of datasets, algorithms, and tools.
- ➤ It extends the Open Services Gateway Initiative (OSGi) (<a href="http://osgi.org">http://osgi.org</a>), a standardized, component oriented, computing environment for networked services widely used in industry since more than 10 years.
- Specifically, CIShell provides "sockets" into which existing and new datasets, algorithms, and tools can be plugged using a wizard-driven process.







# OSGi/CIShell Adoption

CIShell/OSGi is at the core of different CIs and a total of 169 unique plugins are used in the

- Information Visualization (http://iv.slis.indiana.edu),
- Network Science (NWB Tool) (http://nwb.slis.indiana.edu),
- Scientometrics and Science Policy (Sci<sup>2</sup> Tool) (http://sci.slis.indiana.edu), and
- Epidemics (http://epic.slis.indiana.edu) research communities.

Most interestingly, a number of other projects recently adopted OSGi and one adopted CIShell:

Cytoscape (http://www.cytoscape.org) lead by Trey Ideker, UCSD is an open source bioinformatics software platform for visualizing molecular interaction networks and integrating these interactions with gene expression profiles and other state data (Shannon et al., 2002). Bruce visits Mike Smoot in 2009

Taverna Workbench (http://taverna.sourceforge.net) lead by Carol Goble, University of Manchester, UK is a free software tool for designing and executing workflows (Hull et al., 2006). Taverna allows users to integrate many different software tools, including over 30,000 web services. Micah, June 2010

MAEviz (https://wiki.ncsa.uiuc.edu/display/MAE/Home) managed by Shawn Hampton, NCSA is an open-source, extensible software platform which supports seismic risk assessment based on the Mid-America Earthquake (MAE) Center research.

TEXTrend (http://www.textrend.org) lead by George Kampis, Eötvös University, Hungary develops a framework for the easy and flexible integration, configuration, and extension of plugin-based components in support of natural language processing (NLP), classification/mining, and graph algorithms for the analysis of business and governmental text corpuses with an inherently temporal component.

As the functionality of OSGi-based software frameworks improves and the number and diversity of dataset and algorithm plugins increases, the capabilities of custom tools will expand.

# Macroscopes for Kids: Learning Objectives

### Read Charts/Maps

- Distinguish different data sources, types, amounts
- Understand different reference systems
- Understand distortion/projection
- Read visual languages

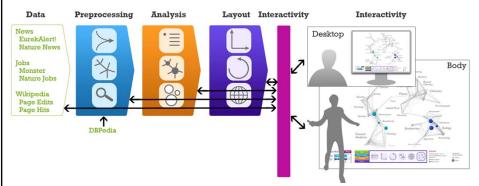
### Make Charts/Maps – a la <a href="http://makezine.com">http://makezine.com</a> but hands-on

- ➤ Identify type and level of analysis
- Design and execute workflows
- ➤ Invent effective visual languages
- Deploy (print, bring online)

Employ **READ<->MAKE feedback loop** and have fun with both!

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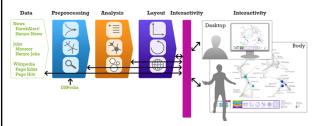
## Macroscopes for Kids: Setup



#### Macroscope can empower children and others to

- Select one or many live data streams and/or static datasets, e.g., Wikipedia and DBPedia,
- Preprocess data, e.g., to delete, filter, merge, extract networks, search data.
- Analyze data, e.g., to compute node and edge properties, identify bursts and clusters.
- Layout data using different reference systems, e.g., tables, charts, circular layout, network, geospatial maps, or science maps.

# Macroscopes for Kids: Setup cont.



### Macroscope can empower children and others to

- Select a data record (e.g., rendered as dot in a scatter plot, dot on a map, or a node in a network) and to search for all other nodes with similar attributes and to request a change of their color, size, shape, or other visual attributes.
- Manipulate the layout, e.g., to sort tables, to change chart axes from linear to log scaling, change cartographic projections.
- To zoom and pan, filter, and request details, e.g., to open a Web browser with the page loaded.

At any moment in time, the complete workflow (currently active datasets, applied preprosessing, analyses, layouts, automatically compiled legend) is visible to facilitate learning and memorization of dataset, algorithm, and parameter choices and their impact on the design of meaningful visualizations.



# Theoretically Grounded and Practically Useful Visualization Framework

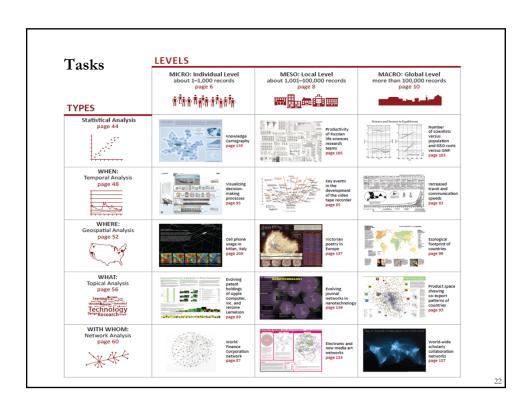
developed to empower the broadest spectrum of users to read and make data visualizations that are useful and meaningful to them.

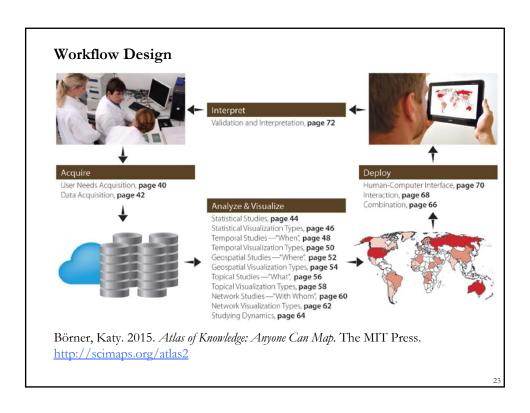
The visualization framework was used to

- design the aforementioned study and
- develop plug-and-play macroscope tools that improve the data visualization literacy of researchers, practitioners, IVMOOC students, museum visitors, and others.

Börner, Katy. 2015. *Atlas of Knowledge: Anyone Can Map.* The MIT Press. <a href="http://scimaps.org/atlas2">http://scimaps.org/atlas2</a>

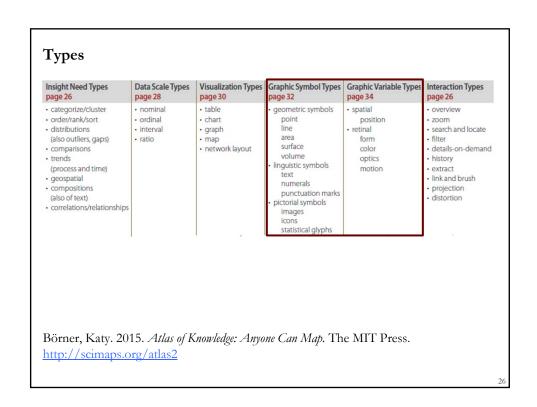


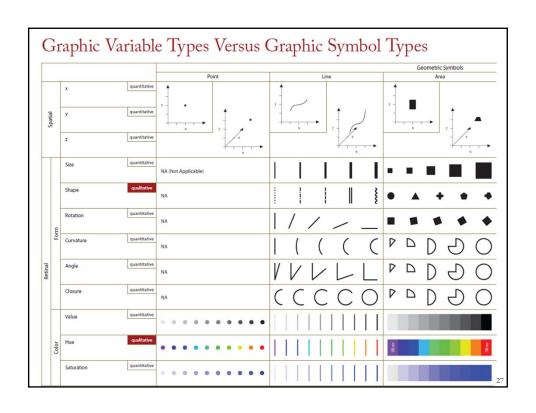




Insight Need Types page 26	Data Scale Types page 28	Visualization Types page 30	Graphic Symbol Types page 32	Graphic Variable Types page 34	Interaction Types page 26
categorize/cluster order/rank/sort distributions (also outliers, gaps) comparisons trends (process and time) geospatial compositions (also of text) correlations/relationships	nominal     ordinal     interval     ratio	table chart graph map network layout	geometric symbols point line area surface volume linguistic symbols text numerals punctuation marks pictorial symbols images icons statistical glyphs	spatial     position     retinal     form     color     optics     motion	overview     zoom     search and locate     filter     details-on-demand     history     extract     link and brush     projection     distortion
			ne Can Map. Th		

Basic Task Typ	oes							
Bertin, 1967	Wehrend & Lewis, 1996	Few, 2004	Yau, 2011	Rendgen & Wiedemann, 2012	Frankel, 2012	Tool: Many Eyes	Tool: Chart Chooser	Börner, 2014
selection	categorize			category				categorize/ cluster
order	rank	ranking					table	order/rank/ sort
	distribution	distribution					distribution	distributions (also outliers gaps)
	compare	nominal comparison & deviation	differences		compare and contrast	compare data values	comparison	comparisons
		time series	patterns over time	time	process and time	track rises and falls over time	trend	trends (process and time)
		geospatial	spatial relations	location		generate maps		geospatial
quantity		part-to- whole	proportions		form and structure	see parts of whole, analyze text	composition	composition (also of text)
association	correlate	correlation	relationships	hierarchy		relations between data points	relationship	correlations/ relationships









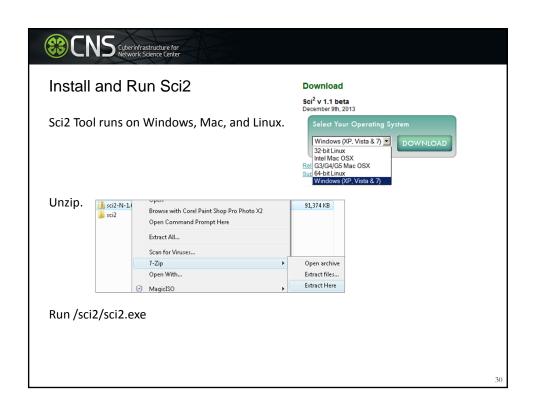
### Software, Datasets, Plugins, and Documentation

- These slides
  - http://cns.iu.edu/docs/presentations/2014-borner-opentoolstutorial-oecd.pdf
- Sci2 Tool Manual v0.5.1 Alpha, updated to match v1.0 Alpha tool release <a href="http://sci2.wiki.cns.iu.edu">http://sci2.wiki.cns.iu.edu</a>
- Sci2 Tool v 1.1 beta (Dec 9, 2013) http://sci2.cns.iu.edu
- Additional Datasets <a href="http://sci2.wiki.cns.iu.edu/2.5+Sample+Datasets">http://sci2.wiki.cns.iu.edu/2.5+Sample+Datasets</a>
- Additional Plugins http://sci2.wiki.cns.iu.edu/3.2+Additional+Plugins



Make sure you have Java 1.6 (32-bit suffices) or higher installed or download from <a href="http://www.java.com/en/download">http://www.java.com/en/download</a>. To check your Java version, open a terminal and run 'java -version'.

Some visualizations are saved as Postscript files. A free Postscript to PDF viewer is at <a href="http://ps2pdf.com">http://ps2pdf.com</a> and a free PDF Viewer at <a href="http://www.adobe.com/products/reader.html">http://www.adobe.com/products/reader.html</a>.



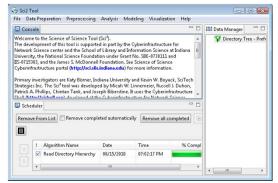


### Sci2 Tool Interface Components

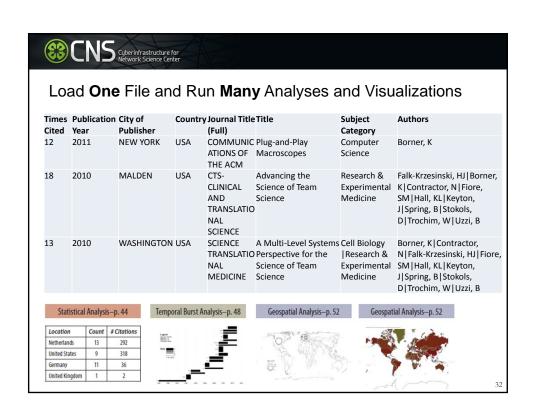
See also http://sci2.wiki.cns.iu.edu/2.2+User+Interface

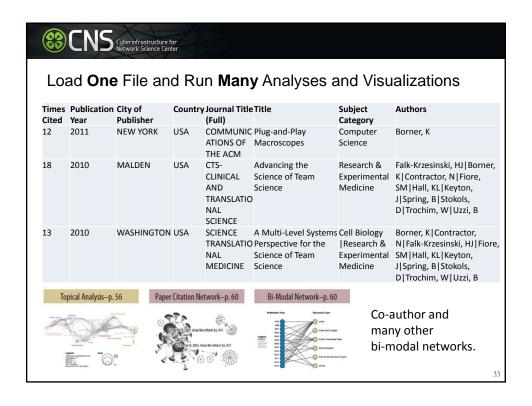
#### Use

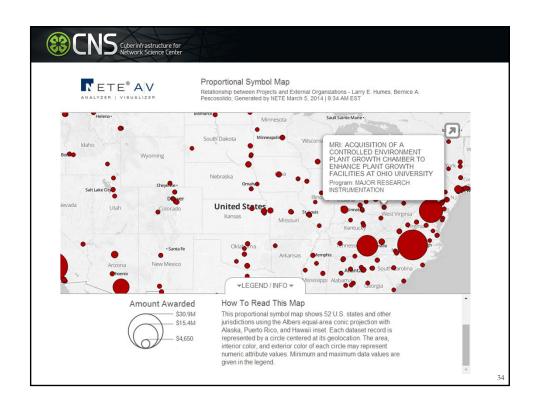
- **Menu** to read data, run algorithms.
- **Console** to see work log, references to seminal works.
- Data Manager to select, view, save loaded, simulated, or derived datasets.
- Scheduler to see status of algorithm execution.

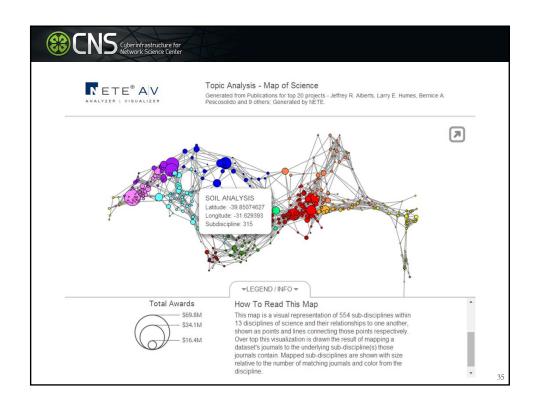


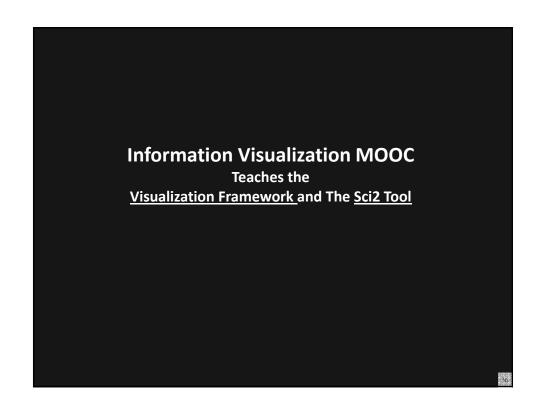
All workflows are recorded into a log file (see /sci2/logs/...), and can be re-run for easy replication. If errors occur, they are saved in a error log to ease bug reporting. All algorithms are documented online; workflows are given in Sci2 Manual at <a href="http://sci2.wiki.cns.iu.edu">http://sci2.wiki.cns.iu.edu</a>

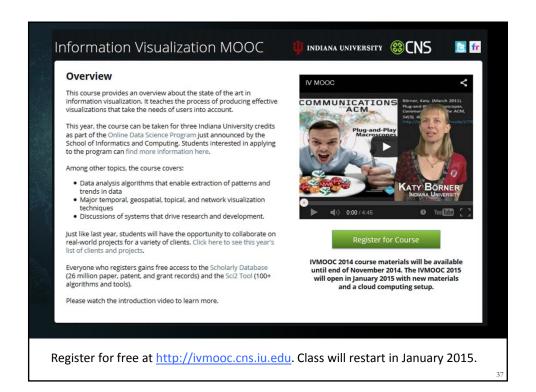


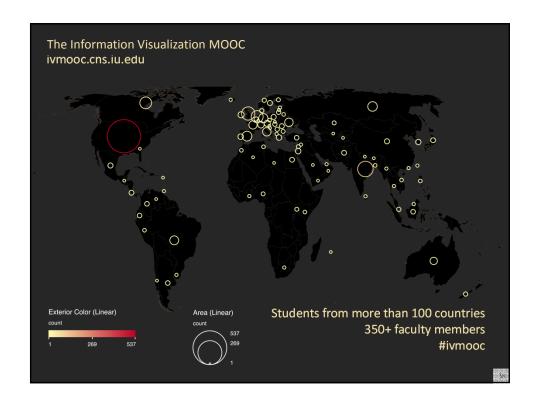












### **Course Schedule**

- Session 1 Workflow design and visualization framework
- Session 2 "When:" Temporal Data
- Session 3 "Where:" Geospatial Data
- Session 4 "What:" Topical Data

#### **Mid-Term**

#### Students work in teams with clients.

- Session 5 "With Whom:" Trees
- Session 6 "With Whom:" Networks
- Session 7 Dynamic Visualizations and Deployment

### **Final Exam**

Final grade is based on Midterm (30%), Final (40%), Client Project (30%).



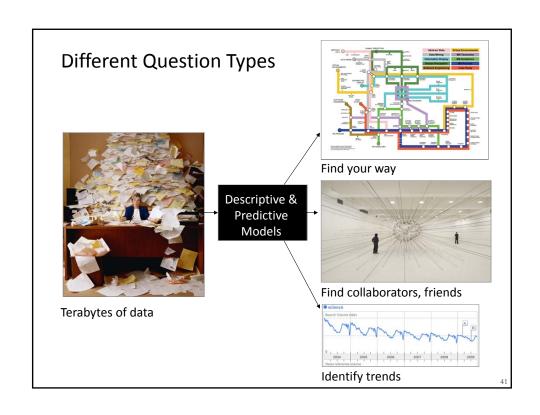


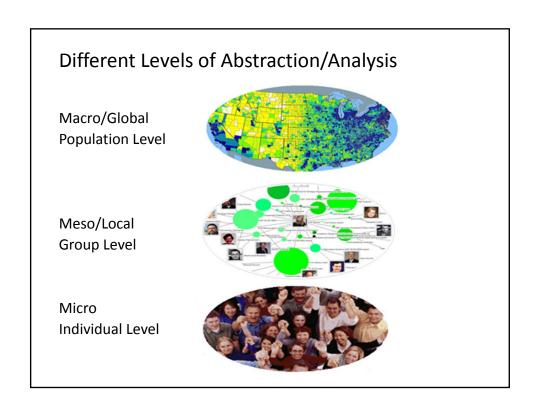
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### **Theory Unit Structure**

Each theory unit comprises:

- Examples of best visualizations
- Visualization goals
- Key terminology
- General visualization types and their names
- Workflow design
  - Read data
  - Analyze
  - Visualize
- · Discussion of specific algorithms





# Type of Analysis vs. Level of Analysis

	Micro/Individual (1-100 records)	Meso/Local (101–10,000 records)	Macro/Global (10,000 < records)
Statistical Analysis/Profiling	Individual person and their expertise profiles	Larger labs, centers, universities, research domains, or states	All of NSF, all of USA, all of science.
Temporal Analysis (When)	Funding portfolio of one individual	Mapping topic bursts in 20 years of <i>PNAS</i>	113 years of physics research
Geospatial Analysis (Where)	Career trajectory of one individual	Mapping a state's intellectual landscape	PNAS publications
Topical Analysis (What)	Base knowledge from which one grant draws.	Knowledge flows in chemistry research	VxOrd/Topic maps of NIH funding
Network Analysis (With Whom?)	NSF Co-PI network of one individual	Co-author network	NIH's core competency

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# Type of Analysis vs. Level of Analysis

