



Florent Bourgeois, Prof.
Laboratoire de Génie Chimique, Université de Toulouse, CNRS
Toulouse, France





## Bringing interactivity into engineering courses with BERT-based Excel®-R applications

#### **PRESENTATION OUTLINE**

- Introduction
- Principles and implementation
- Examples in engineering education
- Conclusions

#### Introduction



- Engineers love Excel®!, perhaps the most (world)widely used
   "Engineer-Machine" interface for data processing.
- VBA (not a full OO programming language, as no inheritance nor function overloading, but includes classes and interfaces), interactive userform design, most engineers have some knowledge of VBA.
- Lacks power for data analysis, modeling and visualisation (not Excel®'s primary function).



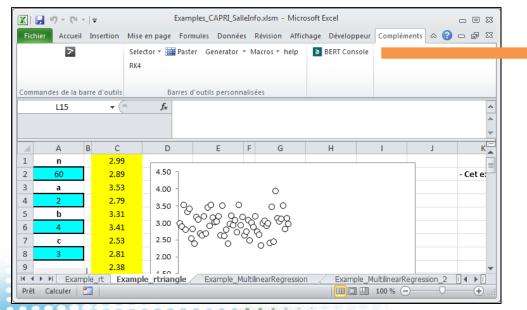
- BERT: Basic Excel R Toolkit (R console for Excel®)
- Free (from <u>Structured Data, LLC</u>)
- BERT version 2 (bert-toolkit.com)



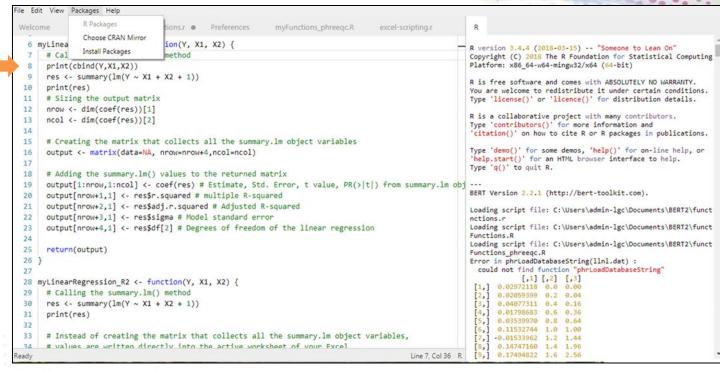
- Virtually limitless capability for data analysis, modeling and visualisation (R's primary function), not limited to statistical data analysis.
- Free
- Still limited use and visibility amongst mainstream engineering community

#### Introduction

- Installation from <a href="https://bert-toolkit.com/download-bert">https://bert-toolkit.com/download-bert</a>
- Excel® add-in → BERT console (R editor)



#### BERT console (.R code)



- BERT's default startup folder = ~\Documents\BERT2\functions\
- Recommendation:
  - Place your .R files in BERT's default startup folder (unless change in "Preferences" file)
  - In BERT consolde: "File > New File" to write your R code (this creates a new tag in the BERT console)
  - Packages necessary for the R code are installed using the "Packages" menu in the BERT console

#### 2 types of applications

- Type 1: Calling native and package-imported R functions from Excel® (VBA code, no R code, no use of the BERT console besides installation of R packages if needed)
- Type 2: Calling user-defined R functions from Excel® (VBA code, R code, use of the BERT console)

#### Recommended VBA code structure for Type 1 applications

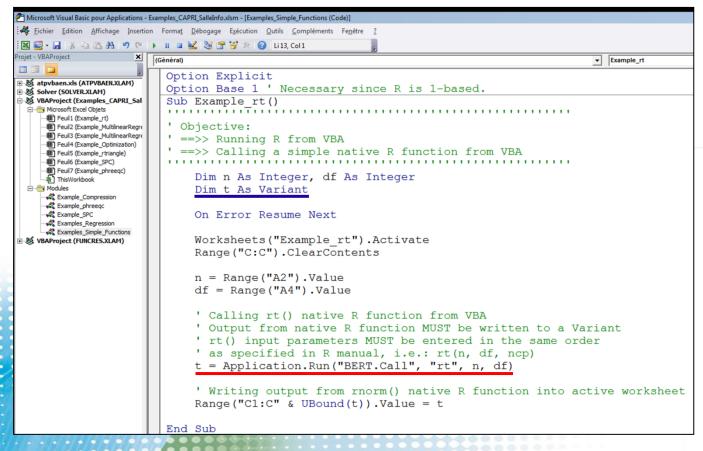
- Section 1: VBA reads the data from the Excel® spreadsheet as type Variant variables.
- Section 2: VBA calls and pass Variant variables to (native, package-imported, own) R functions, using VBA Application.Run() call function.
- Section 3: VBA and/or R writes the output from R functions into the Excel® spreadsheet.

#### Note

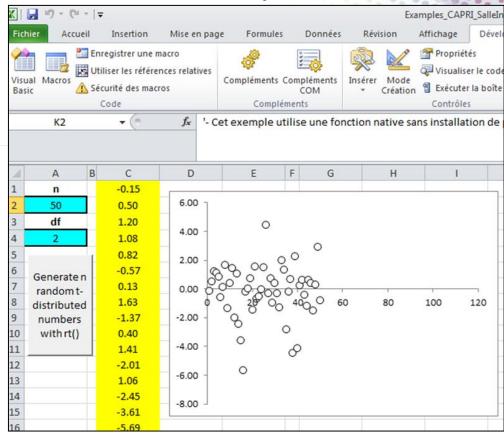
When running the Excel® file with built-in R code, there is no need to open the BERT console. The R code is therefore invisible to the end-user.

Type 1: Calling native and package-imported R functions from Excel® (VBA code, no R code, no use of the BERT console besides installation of R packages)

#### **VBA** editor



#### Excel® spreadsheet

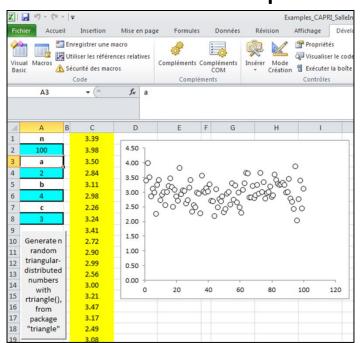


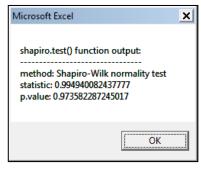
### Type 1: Calling native and package-imported R functions from Excel® (VBA code, no R code, no use of the BERT console besides installation of R packages)

#### **VBA** editor

```
Sub Example rtriangle()
' Objective:
' ==>> Running R from VBA
' ==>> Calling a simple R function from a specific R package.
' BEFORE RUNNING THIS CODE: R packages used by the VBA code must be installed prior to running
' In this example, install the "triangle" package from the BERT console:
' Packages > install Packages > ... Install
    Dim n As Integer, a As Double, b As Double, c As Double
    ' Variables used to call R functions from VBA
    Dim lib As Variant ' Variable used to load a library when running the macro
    Dim var1, var2, var3, var4 'Variant variables used as output to calls to Application.Run()
   On Error Resume Next
                                                                              Requires
    ' Loading an R package from VBA
                                                                           installing the
    lib = Application.Run("BERT.Call", "library", "triangle")
                                                                             "triangle"
   Worksheets ("Example_rtriangle") . Activate
   Range ("C:C") . ClearContents
                                                                           package from
   n = Range("A2"). Value
                                                                        the BERT console
    a = Range("A4").Value
   b = Range("A6"). Value
    c = Range("A8"). Value
    ' Calling rtriangle() function from R package "triangle" from VBA
    ' Output from native R function MUST be written to a Variant
    ' rtriangle() input parameters MUST be entered in the same order as specified in R manual,
    ' rtriangle(n, a=0, b=1, c=(a+b)/2)
   var1 = Application.Run("BERT.Call", "rtriangle", n, a, b, c)
    ' Writing output from rnorm() native R function into active worksheet
   Range("C1:C" & UBound(var1)).Value = var1
   Application.ScreenUpdating = True 'Useful so the Excel graphs are updated without delay
```

#### Excel® spreadsheet





#### Type 2: Calling user-defined R functions from Excel® (VBA code, R code, use of the BERT console)

#### Purpose

- Ideal when needing to develop an "engineer friendly" interface for a running R code.
- Ideal for educators seeking to embed more advanced R functions, related to their engineering courses, into Excel®.
   This brings interactivity (and fun) into the teaching, which helps with student learning.

#### Principles

- Keep all calculations inside your R functions, limiting VBA to pass data back and forth between the Excel® spreadsheet and the R functions.
- Recommended VBA code structure for Type 2 applications
  - Section 1: VBA reads the data from the Excel® spreadsheet and stores them as type Variant variables.
  - Section 2: VBA calls and pass Variant variables to user-defined R functions, whose code (.R files) is in the
     ~\Documents\BERT2\functions\ folder.
  - Section 3: VBA and/or R writes the output from the R functions into the Excel® spreadsheet.

#### Type 2: Calling user-defined R functions from Excel® (VBA code, R code, use of the BERT console)

#### **VBA** editor

#### Sub myLinearRegression VBA() Objective: ==>> Running R from VBA ==>> Calling your own R functions from VBA. Dim Ndata As Integer, i As Integer Dim X1 As Variant, X2 As Variant, Y As Variant Dim var1 As Variant 'Variant variables used as output to calls to Application.Run() On Error Resume Next Worksheets ("Example MultilinearRegression") . Activate Ndata = Application.WorksheetFunction.CountA(Range("B:B")) - 1 ' Reading the values in the Excel spreadsheet X1 = Range (Cells (2, 2), Cells (Ndata + 1, 2)). Value X2 = Range(Cells(2, 3), Cells(Ndata + 1, 3)).ValueY = Range(Cells(2, 4), Cells(Ndata + 1, 4)).Value' Calling myLinearRegression() function from R-Script from VBA ' to estimate the linear model parameter: Y = b0 + b1\*X1 + b2\*X2 var1 = Application.Run("BERT.Call", "myLinearRegression R", Y, X1, X2) Range (Cells (2, 7), Cells (2 + UBound(var1, 1) - 1, 7 + UBound(var1, 2) - 1)). Value = var1 End Sub

#### BERT console (.R code)

```
≥ bert2-console
File Edit View Packages Help
 Welcome
               myFunctions.R ×
                                functions.r •
                                              Preferences
                                                              myFunctions_phre
   6 myLinearRegression R <- function(Y, X1, X2) {
        print(cbind(Y,X1,X2))
        res <- summary(lm(Y \sim X1 + X2 + 1))
        print(res)
        # Sizing the output matrix
       nrow <- dim(coef(res))[1]
       ncol <- dim(coef(res))[2]</pre>
        # Creating the matrix that collects all the summary.lm object varia
       output <- matrix(data=NA, nrow=nrow+4,ncol=ncol)
  17
        # Adding the summary.lm() values to the returned matrix
       output[1:nrow,1:ncol] <- coef(res) # Estimate, Std. Error, t value,
        output[nrow+1,1] <- res$r.squared # multiple R-squared
        output[nrow+2,1] <- res$adj.r.squared # Adjusted R-squared
        output[nrow+3,1] <- res$sigma # Model standard error
        output[nrow+4,1] <- res$df[2] # Degrees of freedom of the linear re
  24
       return(output)
```

Type 2: Calling user-defined R functions from Excel® (VBA code, R code, use of the BERT console)

4	Α	В	С	D	Е	F	G	Н	I	J
						Multilinear model:				
1		X	X^2	Υ	Ymod	Y = b0+b1*X+b2*X^2		Estimate	Std. Error	t value
2		0.0	0.0	0.028	-0.006	Intercept b0		-0.00592123	0.02610861	-0.226792
3	Click	0.2	0.0	-0.085	0.007	b1		0.06540543	0.01830726	3.572649
4	and	0.4	0.2	0.005	0.022	b2		0.00837007	0.00268090	3.122106
5	Run	0.6	0.4	0.087	0.036	Multiple R-squared	0.9557	Output value	from Im/) are	written into
6	your VBA	0.8	0.6	-0.024	0.052	Adjusted R-squared	0.9529			directly from
_ 7	code	1.0	1.0	0.082	0.068	Model Std. Error	0.0538			-
8		1.2	1.4	0.161	0.085	df	31	your own R function.		
9		1.4	2.0	0.105	0.102					
10		1.6	2.6	0.131	0.120	0.900				
11		1.8	3.2	0.065	0.139	0.800 -				°_
12		2.0	4.0	0.143	0.158	0.700 -				<b>%</b> °
13		2.2	4.8	0.173	0.178	0.600 -			。/	_
14		2.4	5.8	0.278	0.199				000000	
15		2.6	6.8	0.163	0.221	0.500 -		С		
16		2.8	7.8	0.192	0.243	0.400 -				
_17		3.0	9.0	0.292	0.266	→ 0.300 -		000		
18		3.2	10.2	0.341	0.289	0.200 -	0	/		
19		3.4	11.6	0.316	0.313	0.200	0 200	°°		
20		3.6	13.0	0.386	0.338	0.100 - 0	مُونِّ مِنْ مِنْ مِنْ مِنْ مِنْ مِنْ مِنْ مِنْ			
21		3.8	14.4	0.357	0.363	0.000		1 1	1	
22		4.0	16.0	0.423	0.390		1.0 2.0	3.0 4.0	5.0	5.0 7.0
23		4.2	17.6	0.480	0.416	H				
24		4.4	19.4	0.537	0.444	-0.200 -		x		
25		4.6	21.2	0.532	0.472					
26		4.8	23.0	0.529	0.501					

Output is formatted to resemble that of Excel's REGLIN() worksheet function

BERT console (.R code)

```
▶ BERT Console
File Edit View Packages Help
 Welcome
              myFunctions.R ×
                                functions.r •
                                              Preferences
                                                             myFunctions_phreeqc.R
     myLinearRegression_R2 <- function(Y, X1, X2) {
       # Calling the summary.lm() method
       res <- summary(lm(Y \sim X1 + X2 + 1))
       print(res)
  32
       # Instead of creating the matrix that collects all the summary.lm object
       # values are written directly into the active worksheet of your Excel.
       range <- EXCEL$Application$get Range("G1:J4")
       range$put Value(coef(res)) # Estimate, Std. Error, t value, PR(>|t|) from
       range <- EXCEL$Application$get Range("G5")
       range$put_Value(res$r.squared) # multiple R-squared
       range <- EXCEL$Application$get_Range("G6")
       range$put Value(res$adj.r.squared) # Adjusted R-squared
       range <- EXCEL$Application$get_Range("G7")
       range$put_Value(res$sigma) # Model standard error
       range <- EXCEL$Application$get_Range("G8")
       range$put_Value(res$df[2]) # Degrees of freedom of the linear regression
       #return(res)
```

Rather than formatting R's output in the Excel spreadsheet using VBA, you can address an Excel® spreadsheet directly from one's R code using BERT's Excel® Scripting (COM) interface (e.g. for reading from and writing to specific cells in the Excel® spreadsheet).

#### Numerical optimization and chemical engineering example

#### The problem:

- 3-stage compression problem for ideal gas and adiabatic conditions.
- O Starting with inlet temperature  $T_1$  and pressure  $P_1$ , and seeking an outlet pressure  $P_4$ , the problem consists in finding the inlet and outlet pressures  $P_2$  and  $P_3$  of the intermediate compression stage that yield the minimum compression work W. With  $P_1 < P_2 < P_3 < P_4$ , k=1.4 and R the ideal gas constant, the compression work W can be expressed as

$$W = \frac{kRT_1}{k-1} \left[ \left( \frac{P_2}{P_1} \right)^{(k-1)/k} + \left( \frac{P_3}{P_2} \right)^{(k-1)/k} + \left( \frac{P_4}{P_3} \right)^{(k-1)/k} - 1 \right]$$

Students are invited to try the Nelder-Meade algorithm to solve the problem.

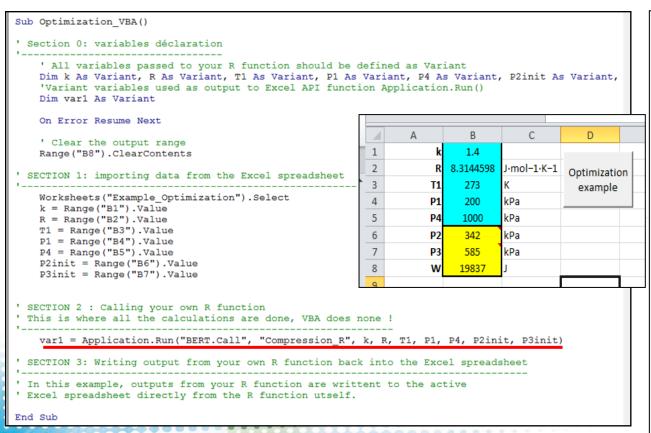
#### Step 1 :

- Search the CRAN archive for the R package you need. A quick web search indicates that Nelder-Mead algorithm is available in several R packages, e.g. "optimization" (<a href="https://cran.r-project.org/web/packages/optimization/index.html">https://cran.r-project.org/web/packages/optimization/index.html</a>, Husmann et al.).
- The "Package > Install Packages" menu from the BERT console is used to install the "optimization" package.
- Write your (user-defined) R function, adding it to the ~\BERT2\functions\ folder.

#### Step 2 :

- Use of a Type 2 application, i.e. the whole numerical optimization solution to the problem is coded in a user-defined
   R function, and VBA is simply used to pass the data between the Excel® spreadsheet and the R code.
- The VBA code makes a single call to the R function *Compression\_R()*. The function loads the "optimization" package and uses the optim\_nm() function, which implements the Nelder-Meade algorithm.

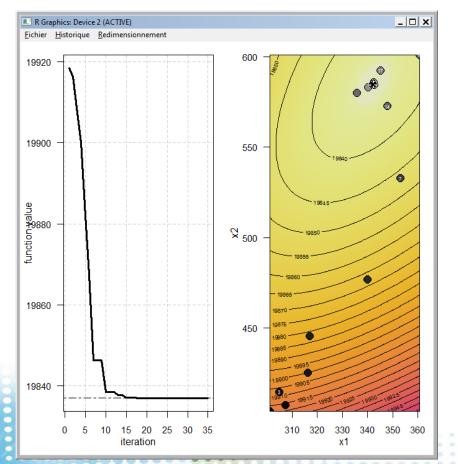
#### **VBA** editor

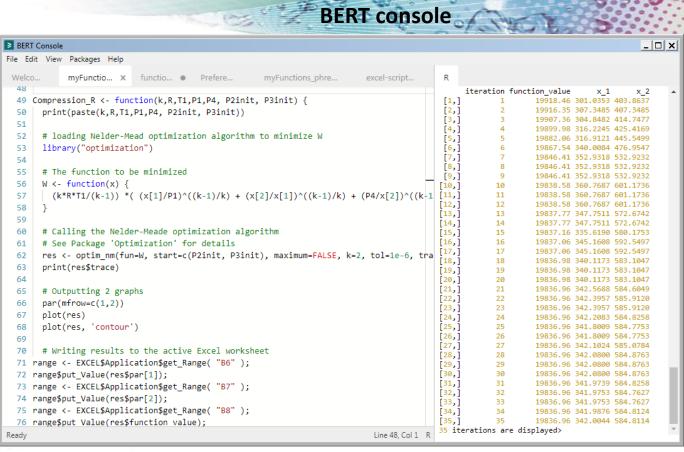


- Pressures  $P_1$  and  $P_2$  are initialized in the Excel® spreadsheet.
- The VBA code calls the compression\_R() function, which returns the work W.
- Here, the R code writes directly to the Excel® spreadsheet.

#### **BERT console (.R code)**

```
≥ BERT Console
File Edit View Packages Help
 Welcome
              myFunctions.R ×
                                functions.r •
                                              Preferences
                                                              myFunctions phreegc.R
                                                                                       excel-scripting.r
  49 Compression R <- function(k,R,T1,P1,P4, P2init, P3init) {
        print(paste(k,R,T1,P1,P4, P2init, P3init))
  51
        # loading Nelder-Mead optimization algorithm to minimize W
       library("optimization")
  54
  55
        # The function to be minimized
       W <- function(x) {
         (k*R*T1/(k-1)) *((x[1]/P1)^((k-1)/k) + (x[2]/x[1])^((k-1)/k) + (P4/x[2])^((k-1)/k) - 1)
  58
  59
        # Calling the Nelder-Meade optimization algorithm
        # See Package 'Optimization' for details
        res <- optim nm(fun=W, start=c(P2init, P3init), maximum=FALSE, k=2, tol=1e-6, trace=TRUE)
  63
        print(res$trace)
        # Outputting 2 graphs
        par(mfrow=c(1,2))
        plot(res)
        plot(res, 'contour')
       # Writing results to the active Excel worksheet
  71 range <- EXCEL$Application$get_Range( "B6" );</pre>
  72 range$put Value(res$par[1]); # Pressure P2
  73 range <- EXCEL$Application$get Range( "B7" );
  74 range$put_Value(res$par[2]); # Pressure P3
  75 range <- EXCEL$Application$get Range( "B8" );
  76 range$put_Value(res$function_value); # Work W
  77
  78
```





- Graphs (here, a contour plot) and data (here, the trace of the optimization path) returned from the R functions are produced, as expected. Data output by R functions are written to the BERT console.
- Interfacing between Excel® and R is done in a few minutes time, top!
- Students can modify the Excel® interface as they wish, making the work interactive and fun while giving them the opportunity to interactively test the behaviour of the numerical algorithm, such as its sensivity to initialisation, or experiment with the design of the pumping system and more.

Statistical process control example: drawing and analysing control charts using the qcc package (<a href="https://cran.r-project.org/web/packages/qcc/index.html">https://cran.r-project.org/web/packages/qcc/index.html</a>, Scrucca et al.)

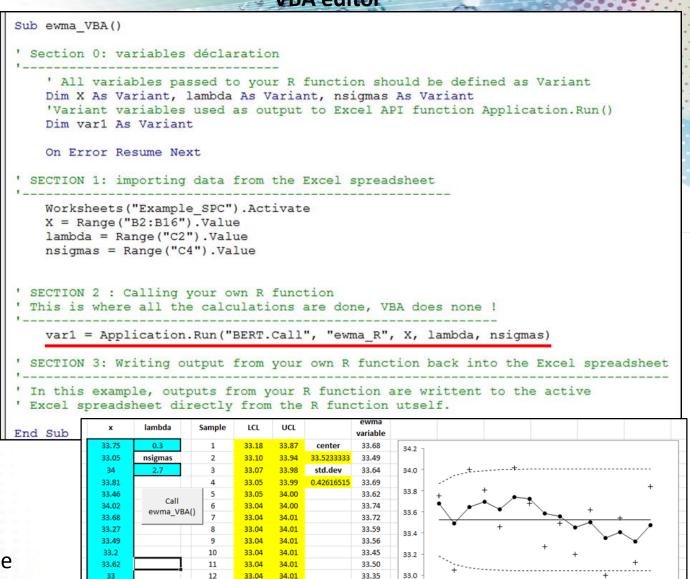
#### **BERT console**

```
■ BERT Console

File Edit View Packages Help
               myFunctions.R X
 Welcome
                                  functions.r •
                                                 Preferences
  80 ewma_R <- function(x, lambda, nsigmas) {
       # loading the 'qcc' ppackage
        library("qcc")
        # calling the ewma() function from the "qcc" package
        q <- ewma(data=x, lambda=lambda, nsigmas=nsigmas)</pre>
        summary(q)
        # Writing output values to the active Excel worksheet
        range <- EXCEL$Application$get_Range( "F2:G16" );</pre>
        range$put Value(q$limits);
        range <- EXCEL$Application$get Range( "H3" );</pre>
        range$put Value(q$center);
        range <- EXCEL$Application$get Range( "H5" );</pre>
        range$put Value(q$std.dev);
```

Not discussed here, it is implicit that you can use all the interfacing capability built into VBA (with userforms) to quickly and simply produce neat interactive user interfaces.

#### **VBA** editor



33.41

33.32

34.01

34.01

33.04

33.54

33.12

**Geochemical example:** Study of the relative thermodynamic stability (dissolution/precipitation) of two minerals in pure water, namely gypsum and anhydrite, as a function of temperature at 1 atm. (<a href="https://cran.r-project.org/web/packages/phreeqc/index.html">https://cran.r-project.org/web/packages/phreeqc/index.html</a>, Charlton et al.)

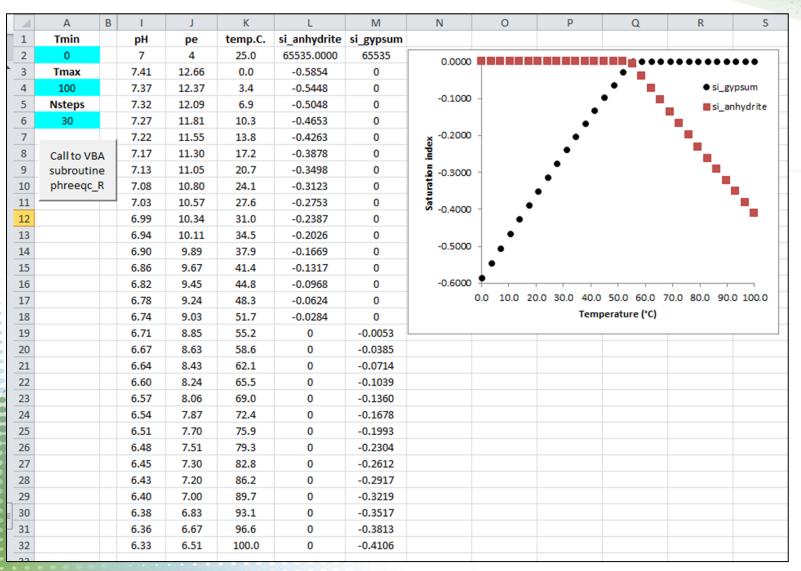
#### **VBA** editor

```
Sub phreeqc VBA()
 Section 0: variables déclaration
   ' All variables passed to your R function should be defined as Variant
   Dim Tmin As Variant, Tmax As Variant, Nsteps As Variant
   'Variant variables used as output to Excel API function Application.Run()
   Dim var1 As Variant
   ' variables used to get the size of the R output variable var1
    Dim nrow As Integer, ncol As Integer
    On Error Resume Next
    ' Clear the output range
    Range ("C:N") . ClearContents
 SECTION 1: importing data from the Excel spreadsheet
    Worksheets ("Example phreegc") . Activate
    Tmin = Range ("A2") . Value
    Tmax = Range ("A4") . Value
    Nsteps = Range ("A6") . Value
 SECTION 2 : Calling your own R function
 This is where all the calculations are done, VBA does none !
   var1 = Application.Run("BERT.Call", "phreegc R", Tmin, Tmax, Nsteps)
 SECTION 3: Writing output from your own R function back into the Excel spreadsheet
   nrow = UBound(var1, 1)
   ncol = UBound(var1, 2)
   Range (Cells (1, 3), Cells (nrow, ncol + 2)). Value = var1
End Sub
```

#### **BERT console**

```
File Edit View Packages Help
 Welcome myFunctions.R x functions.r • Preferences
 98 phreeqc_R <- function(Tmin, Tmax, Nsteps) {
 100 # loading the 'phreeqc' package
 101 library("phreeqc")
 103 range <- EXCEL$Application$get_Range( "A4" )
 104 x <- range$get_Value()
 105 print(paste("x=",x))
 107 # load the phreegc.dat database
 108 phrLoadDatabaseString(phreeqc.dat)
 110 # Building a PHREEQC script and passing it the input temperatures
 111 phrRunString(phreeqc_script(Tmin, Tmax, Nsteps))
 113 # retrieve selected output as a list of data.frame
 114 so <- phrGetSelectedOutput()
116 # returning the results output by PHREEQC
117 return(so$n1)
118 }
 120 phreeqc_script <- function(Tmin, Tmax, Nsteps) {</pre>
 121 # writing the PHREEQC script
 122 input <- vector()
 124 input <- c(input, "TITLE Example 2.--Temperature dependence of solubility")
 125 input <- paste(input, "of gypsum and anhydrite")</pre>
 126 input <- c(input, "SOLUTION 1 Pure water")
 127 input <- c(input, "pH 7.0")
 128 input <- c(input, "temp 25.0")
 129 input <- c(input, "EQUILIBRIUM PHASES 1")
 130 input <- c(input, "Gypsum
 131 input <- c(input, "Anhydrite
 132 input <- c(input, "REACTION_TEMPERATURE 1")</pre>
 133 # Creation of the modified line with new entries
 134 Excel_input <- paste(Tmin," ",Tmax," in ",Nsteps," steps")
 135 input <- c(input, Excel input)
 136 input <- c(input, "SELECTED_OUTPUT")
 137 input <- c(input, "-file ex2.sel")
 138 input <- c(input, "-temperature")
 139 input <- c(input, "-si
                               anhydrite gypsum")
140 input <- c(input, "END")
142 return(input)
143 }
```

Geochemical example: Study of the relative thermodynamic stability (dissolution/precipitation) of two minerals in pure water, namely gypsum and anhydrite, as a function of temperature at 1 atm. (<a href="https://cran.r-project.org/web/packages/phreeqc/index.html">https://cran.r-project.org/web/packages/phreeqc/index.html</a>, Charlton et al.)



#### **Conclusions**

- With Excel®'s inescapability in the engineering community, both at university and at the work place, the ability to bring all of R's numerical strength into Excel® applications is a highly attractive proposition.
- BERT is a simple, efficient and free R-Excel® interoperability solution. Interfacing an existing R code with an Excel® worksheet adds interactivity and acceptability to one's R code. Very few lines of code (VBA and/or R) are necessary to embed your R code into Excel®.
- Interfacing Excel® and R for undergraduate engineering courses brings interactivity and fun into the learning of engineering courses, which can only help with the understanding of the course material.
- Beyond engineering education:
  - Development of excel® applications that take advantage of R's capabilities can be highly beneficial for practicing engineers.
  - Mixing advanced VBA and R computing can produce rather "sophisticated" engineering applications, with a user-interface that will never be a turn-off for any practicing engineer, as engineers (and others...) do love Excel®!
  - The combination of Excel® and R offers a highly competitive environment, technically and financially, for all engineering professionals and companies.



# Thank you for you**R Excel**lent attention



Should you want to get in touch:

Florent.bourgeois@toulouse-inp.fr

https://lgc.cnrs.fr/annuaire/florent-bourgeois/

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