Session 2: Introduction to R Programming

R for Stata Users

Luiza Andrade, Rob Marty, Rony Rodriguez-Ramirez, Luis Eduardo San Martin, Leonardo Viotti The World Bank | WB Github

May 2022



Table of contents

- 1. Introduction
- 2. Initial settings
- 3. File paths
- 4. Exploring a dataset
- 5. Creating a document outline in RStudio
- 6. Using packages
- 7. Functions inception
- 8. Mapping and iterations
- 9. Custom functions
- 10. Indentation
- 11. Appendix

Introduction

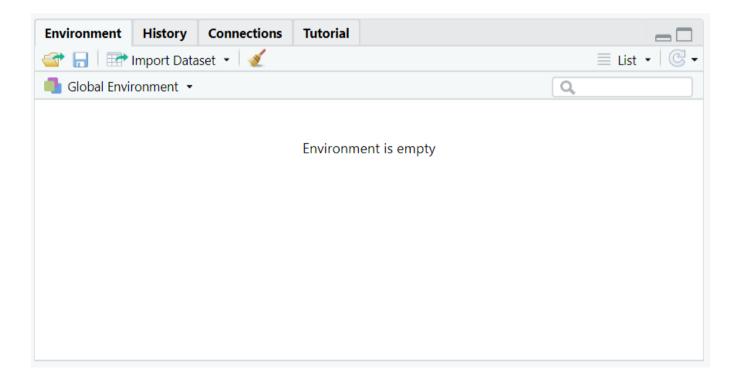
What this session is about

- In the first session, you learned how to work with R
- You are probably eager to start programming in R by now
- But before you start, we recommend learning how to write R code that will be **reproducible, efficient, intelligible and easy to navigate**
- Indeed, that's what this session is about!

What this session is about

- We will cover common coding practices in R so that you can make **the most efficient use** for it
- We will also discuss some styling conventions to make your code **readable and reproducible**
- This will give you a solid foundation to write code in R and hopefully you'll be able to skip some painful steps of the "getting-your-hands-dirty" learning approach

- Let's start by opening RStudio or by closing and opening it again
- Notice two things:
 - 1. Your environment is *probably* empty (it's OK if it's not)

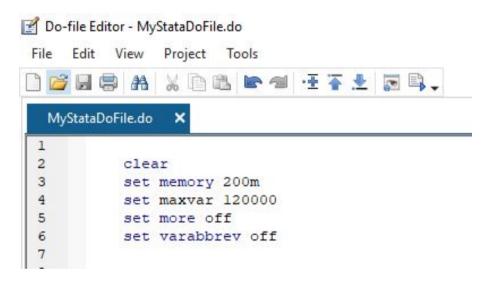


- Let's start by opening RStudio or by closing and opening it again
- Notice two things:
 - 1. Your environment is *probably* empty (it's OK if it's not)
 - 2. Go to the **Console** panel and use the up and down keys to navigate through previously executed commands. They are saved by default in a file named . **Rhistory** that you might have noticed

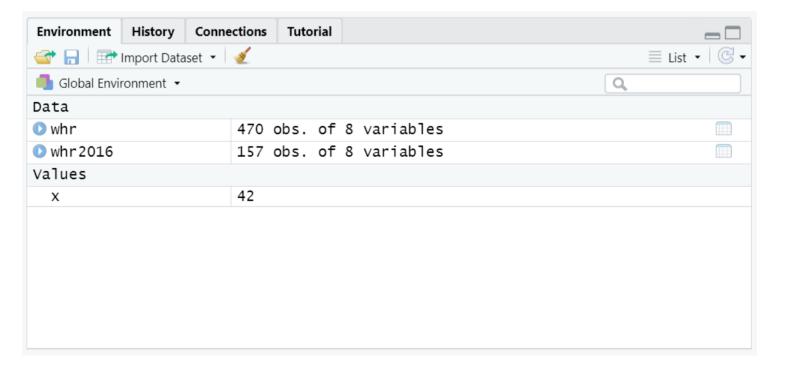
Name	Date modified	Туре
.git	4/6/2021 2:07 PM	File folder
Rproj.user	4/6/2021 9:51 AM	File folder
DataWork	4/5/2021 4:37 PM	File folder
Presentations	4/6/2021 5:16 PM	File folder
<u></u>	4/5/2021 4:37 PM	GITIGNORE File
.Rhistory	4/6/2021 4:18 PM	RHISTORY File
B dime-r-training.Rproj	4/6/2021 4:17 PM	R Project
LICENSE	12/15/2020 2:53 PM	File
	4/5/2021 4:37 PM	MD File

- Let's start by opening RStudio or by closing and opening it again
- Notice two things:
 - 1. Your environment is *probably* empty (it's OK if it's not)
 - 2. Go to the **Console** panel and use the up and down keys to navigate through previously executed commands. They are saved by default in a file named . **Rhistory** that you might have noticed
- We'd usually want these two things -- an **empty environment** and the **history of commands** executed in previous sessions -- to be present every time we open a new RStudio session

Have you ever seen these lines of code before?



- We don't need to set the memory or the maximum number of variables in R
- The equivalent of set more off is the default
- The equivalent of clear all is not a default setting, but we'll change that in exercise 1
- In any case, remember that you can see all the objects in your computer's memory at any point in the Environment panel

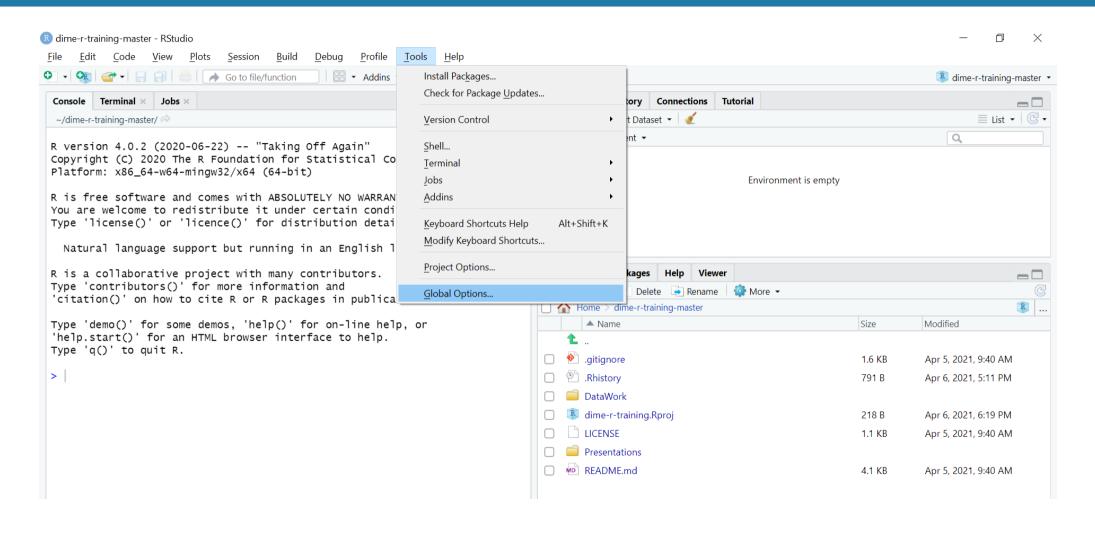


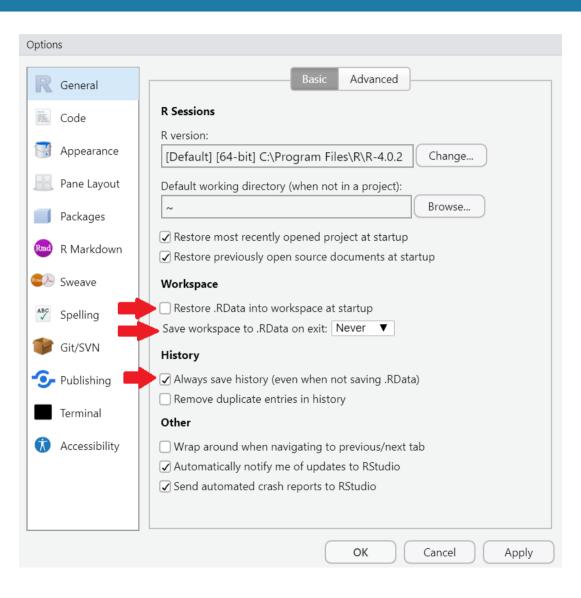
Exercise 1 (1 min)

After this, you'll never have to use the equivalent of clear all

```
1. Go to Tools > Global Options...
```

- 2. In the **General** tab, make sure the following options are set:
 - Un-check Restore .RData into workspace at startup
 - For Save workspace to .RData on exit, select Never
 - Make sure Always save history (even when not saving .RData) is checked
- 3. Now restart RStudio

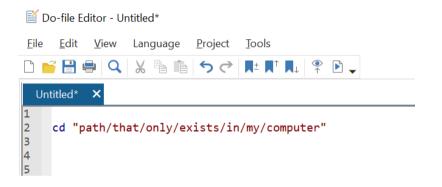




File paths

File paths

• What about working directories? We usually do something like this every time we start a new script in Stata:



• The direct equivalent to cd in R is this command:

```
setwd("your/path")
```

• However, we recommend not using it unless it's absolutely necessary (never, if possible)

RStudio projects

• Instead, you should use RStudio projects and the here library

Important: We won't get into the specifics of directory organization here, but we'll assume that all the files you use for a specific project (data, scripts, and outputs) reside in the same project directory. We'll call this the **working directory**.

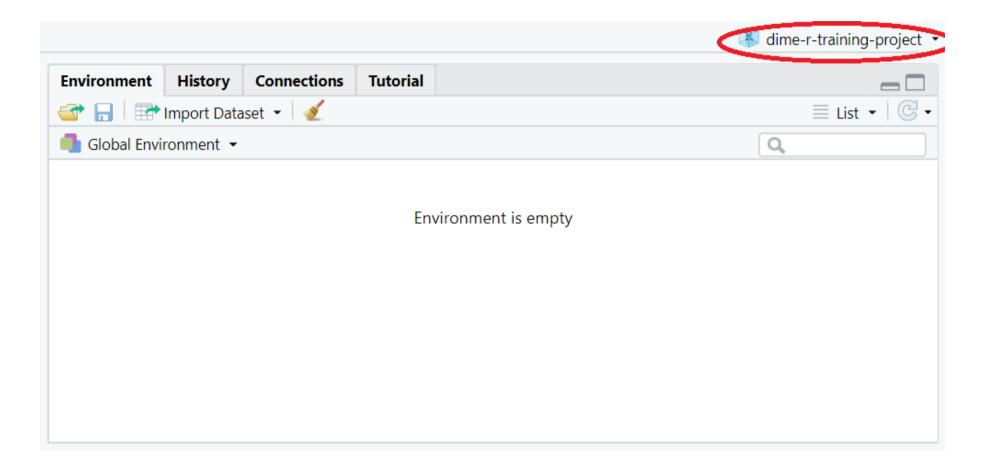
- RStudio projects let you "bind" your project files to a root directory, regardless of the path to it
- This is crucial because it allows smooth interoperability between different computers where the exact path to the project root directory differs
- Additionally, each RStudio project you work on keeps their own history of commands!

RStudio projects

Exercise 2 (1 min)

- 1. On RStudio, select File > New Project...
- 2. Select New Directory > New Project
- 3. Assign the name: dime-r-training-project to the project

RStudio projects



The here library

- here locates files relative to your project root
- It uses the root project directory to build paths to files easily
- Similar to RStudio projects, it allows for interoperability between different computers where the absolute path to the same file is not the same

Usage of here

• Install and load the here library:

```
install.packages("here")
library(here)
```

- Now you'll be able to use here() to point the location of every file relative to your project root
 - For example, to load a csv file located in: C:/WBG/project-root-name/data/raw/data-file.csv, you should use:

```
path <- here("data", "raw", "data-file.csv")
df <- read.csv(path)</pre>
```

Notes:

- Your project root is the directory that contains the .Rproj file
- The result of here() is an absolute path that points to a file or folder location in your computer

File paths

Exercise 3 (a min)

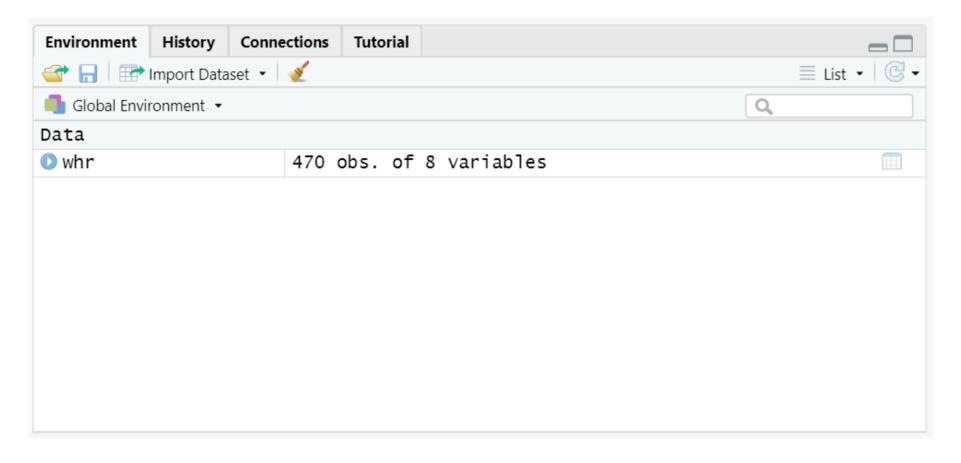
- 1. Go to the OSF page of the course and download the file in: R for Stata Users 2022 May > Data > DataWork.zip
- 2. Unzip the file in your RStudio project root folder. This is the folder where the file dime-r-training-project.Rproj sits
- 3. On RStudio, go to File > New File > R Script and save this new empty script in DataWork > Code as exercises-session2.R
- 4. Now let's test if that worked. Load the here library and read the csv file DataWork/DataSets/Final/whr_panel.csv using here()
 - Use the function read.csv() to load the file. The argument for read.csv() is the result of here()
 - Remember to assign the dataframe you're reading to an object. You can call it whr as we did yesterday

File paths

```
library(here)
whr <- read.csv(here("DataWork", "DataSets", "Final", "whr_panel.csv"))</pre>
```

RStudio projects and here

If you did the exercise correctly, you should see the whr data frame listed in the Environment panel



Creating a document outline in RStudio

Document outline

- RStudio allows you to **create an interactive index** for your scripts
- To add a section to your code, create a commented line with the title of your section and add at least 4 trailing dashes (---), pound signs (####) or equal signs (====) after it

Document outline

Exercise 4 (1 min)

- 1. In your script, add a header before the line where you used libraries---- with the text: # Part 1: Loading
- 2. Before read.csv(...), add the following header: Part 2: Loading data----
 - Remember: you create a section header by adding at least 4 trailing dashes (-), pound (#) or equal (=) signs in a comment line
- 3. Note that once you create a section header, an arrow appears right next to the row number. Click on the arrows to see what happens.

Document outline

- The outline can be accessed by clicking on the button on the top right corner of the script window. You can use it to jump from one section to another
- You can also use the keyboard shortcuts Alt + L (Cmd + Option + L on Mac) and Alt + Shift + L to collapse and expand sections

```
exercises.R ×

| Source on Save | Source
```

Some useful functions:

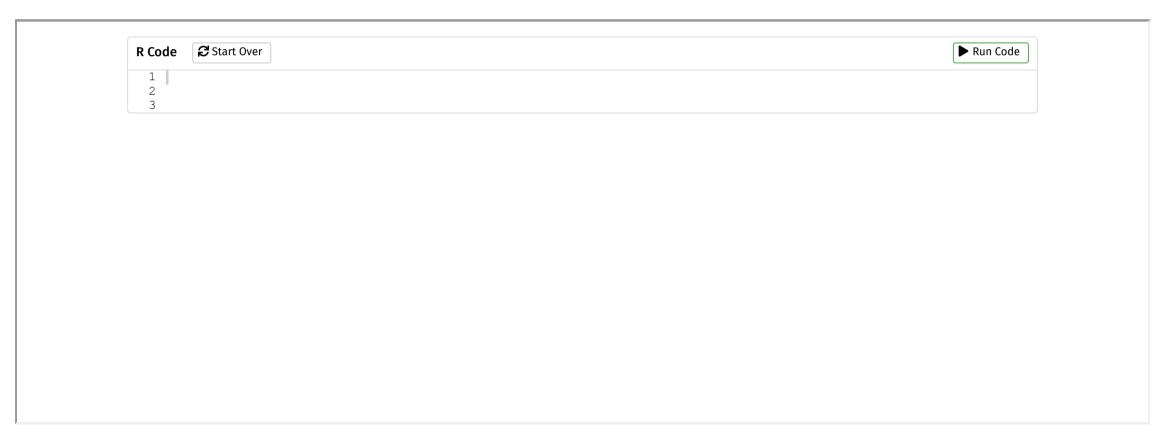
- View(): opens the data set
- class(): reports object type or type of data stored
- dim(): reports the size of each one of an object's dimension
- names(): returns the variable names of a data set
- str(): general information about the structure of an R object
- **summary():** summary information about the variables in a data frame
- head(): shows the first few observations in the dataset
- tail(): shows the last few observations in the dataset

```
# View the data set (notice the uppercase "V")
View(whr)
```

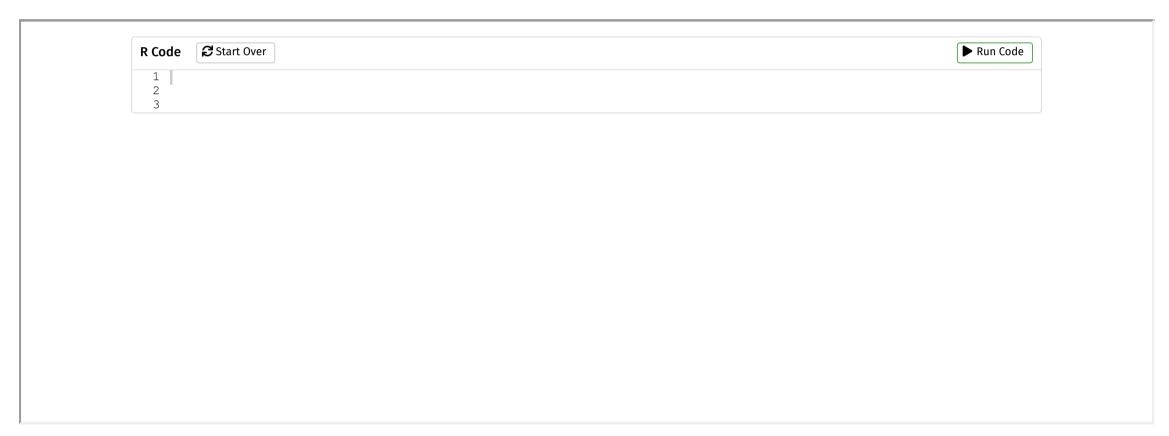
This is the same as clicking on the object name in the environment panel. It opens a spreadsheet-style data viewer of a dataframe.

			Q				
^	country	region	year [‡]	happiness_rank	happiness_score	economy_gdp_per_capita	hea
1	Switzerland	Western Europe	2015	1	7.587	1.39651	
2	Iceland	Western Europe	2015	2	7.561	1.30232	
3	Denmark	Western Europe	2015	3	7.527	1.32548	
4	Norway	Western Europe	2015	4	7.522	1.45900	
5	Canada	North America	2015	5	7.427	1.32629	
6	Finland	Western Europe	2015	6	7.406	1.29025	
7	Netherlands	Western Europe	2015	7	7.378	1.32944	
8	Sweden	Western Europe	2015	8	7.364	1.33171	
9	New Zealand	Australia and New Zealand	2015	9	7.286	1.25018	•
4						>	

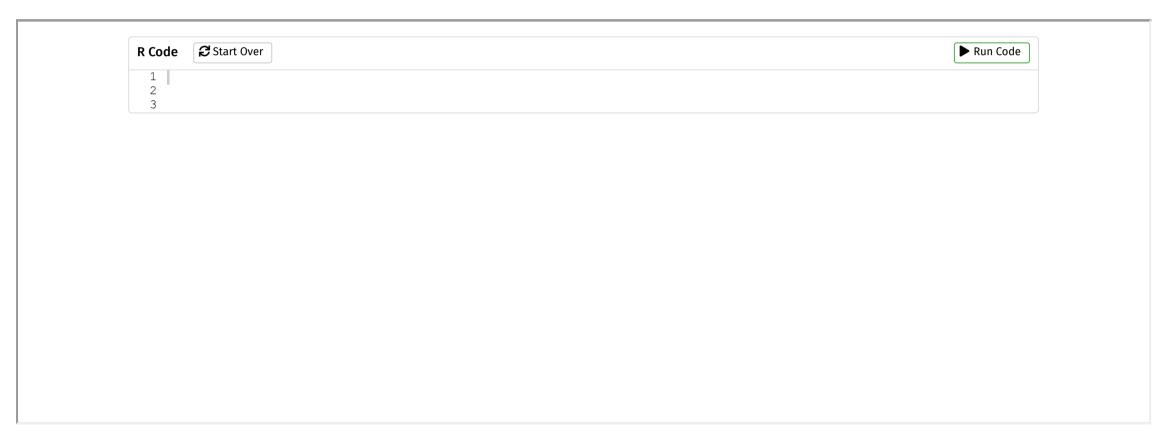
```
# Object type and dimensions
class(whr)
dim(whr)
```



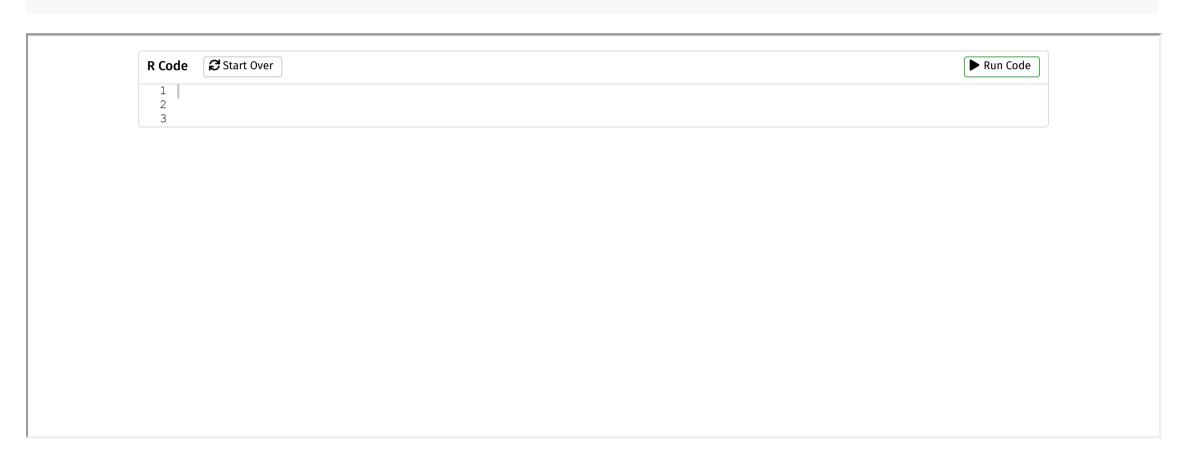
```
# Object structure
str(whr)
```



```
# Summarize a dataframe
summary(whr)
```



Printing the first rows of a dataframe
head(whr)



Using packages

Packages

- Since there is a lot of people developing for R, it can have many different functionalities.
- To make it simpler, these functionalities are bundled into packages.
- A package is just a unit of shareable code.

Packages

- It may contain new functions, but also more complex functionalities, such as a Graphic User Interface (GUI) or settings for parallel processing (similar to Stata MP).
- They can be shared through R's official repository CRAN (18,000+ packages reviewed and tested).
- There are many other online sources such as GitHub, but it's important to be careful, as these probably haven't gone through a review process as rigorous as those in CRAN.

Packages

• To install and use packages you can either do it with the user interface or by the command prompt.

• You only have to install a package once, but you have to load them every new session.

Using packages

Exercise 5 🖾 (1 min)

- 1. Load the tidyverse meta package in part 1 of your script using library(tidyverse)
- 2. Run your script

Warnings vs errors

What if this happens?

Warnings vs errors

R has two types of error messages, warnings and actual errors:

- Errors break your code, usually preventing it from running.
- Warnings usually mean that nothing went wrong yet, but you should be careful.

RStudio's default is to print warning messages, but not to stop the code at the lines where they occur. You can configure R to stop at warnings if you want.

Functions inception

- In R, you can write one function inside another
- In fact, you have already done this several times in this course
- Here's an example:

```
# Print the summary of the logarithm of the happiness score

## The long way:
log_score <- log(whr$happiness_score)
summary(log_score)

# The shortcut
summary(log(whr$happiness_score))</pre>
```

- This is a simple example of **metaprogramming** (that's the real name of this technique) and may seem trivial, but it's not
- For starters, you can't do it in Stata!

```
Copyright 1985-2017 StataCorp LLC
  Statistics/Data Analysis
                                      StataCorp
                                      4905 Lakeway Drive
     MP - Parallel Edition
                                      College Station, Texas 77845 USA
                                      800-STATA-PC
                                                          http://www.stata.com
                                      979-696-4600
                                                          stata@stata.com
                                      979-696-4601 (fax)
681-user 4-core Stata network perpetual license:
       Serial number: 501506002486
         Licensed to: WBG User
                       World Bank Group
Notes:
     1. Unicode is supported; see help unicode advice.
      2. More than 2 billion observations are allowed; see help obs advice.
      3. Maximum number of variables is set to 120000; see help set maxvar.
      4. New update available; type -update all-
running C:\Program Files (x86)\Statal5\sysprofile.do ...
. sysuse auto
(1978 Automobile Data)
. summarize log(make)
variable log not found
r(111);
```

- Metaprogramming is a **very powerful technique**, as you will soon see
- It's **also a common source of error**, as you can only use one function inside the other if the output of the inner function is the same as the input of the outer function
- It can also get quite tricky to follow what a line of code with multiple functions inceptions is doing

Piping

- Ever heard of piping? It's this: %>%
- Piping is a way of doing metaprogramming
- The actual meaning of the pipes is: Pipes take the **output** of the function at the left and pass it as the **first argument** of the function at the right
- The advantages of using piping is that it allows to have a cleaner division of successively applied functions in R code, drastically improving code readability

Piping

```
# 1: Doing it the long way ------
log_score <- log(whr$happy_score)
mean(log_score)

# 2: Shortcut to get to the same place -----
mean(log(whr$happy_score))

# 3: Now with pipes ------
whr$happy_score %>%
log() %>%
mean()
```

Just remember:

- x %>% f() is the same as f(x)
- x %>% f() %>% g() is the same as g(f(x))

Mapping and iterations

Iterations in R

- In Stata, we use for loops very frequently
- In R, the syntax of for loops is this:

```
for (number in 1:3) {
    print(number)
}
```

```
## [1] 1
## [1] 2
## [1] 3
```

- R, however, has a set of functions that allows users to loop through an object **in a more efficient way**, without using explicit loops
- In this training we'll introduce map(). It is a function part of the tidyverse meta package
- Also, in case you have not noticed yet: **R is vectorized!** this means that many operations are applied element-wise by default so you don't have to code loops to apply them to each element of a vector or dataframe

Map

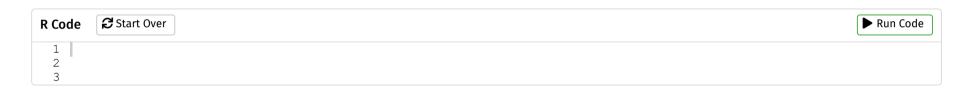
- To use map(), you need to either load the package purr eithre by itself or alongside other tidyverse packages
- The basic syntax of map() is:

map(X, function, ...): applies function to each of the elements of X. If X is a data frame then function is applied column-wise while if it's a vector or a list it is applied item-wise. The output of map() is always a list with the results.

- X: a data frame, matrix or vector the function will be applied to
- function: the name of the function you want to apply to each of the elements of X

Map

```
# Round the values of the following vector
x <- c(1.2, 2.5, 9.1, 5.8)
x %>% map(round) # Rounding the vector elements (same as map(x, round))
round(x) # since R is vectorized, this also works
```



- When looping, you repeat the same operation over a set of items
- map(), instead, takes all your elements at once and applies an operation to them simultaneously
- The difference is like this:
 - Imagine you ask a yes/no question to a group of people
 - You can collect the answers by asking each one of them individually -- this is looping
 - Otherwise, you can ask them to raise their hands and collect all answers at once -- this is map()
- The output of a loop is the regular output of the operation you're repeating, times the number of iterations you did
- The output of map() will be always a list
- When it comes to code clarity, map() has a few advantages:
 - Loops often have side effect results, like a temporary variable that stays in the environment after the loop finishes
 - map() often involves less lines of code than loops

Exercise 6: Looping over a dataframe (3 min)

• Create a toy dataframe of 70,000 columns and 400 observations using this code

```
df <- data.frame(replicate(70000, sample(1:100, 400, replace=TRUE)))</pre>
```

- Create an empty vector named col_means_loop where you will store column means with this code:
 col_means_loop <- c()</pre>
- Loop over every column to get the column means and store them in the vector

```
for (column in df) {
   ....
}
```

- Inside the loop:
 - Use mean() to get each column mean
 - Use append() to add a new mean to the vector: col_means_loop <- append(col_means_loop, new_mean)

The solution is this:

```
df <- data.frame(replicate(70000, sample(1:100, 400, replace=TRUE)))

col_means_loop <- c()

for (col in df){
   col_means_loop <- append(col_means_loop, mean(col))
}</pre>
```

```
Exercise 7: Now use map() ( 1 min)

• Use map() to produce a list with the means of the columns of df

• Store the result in a list named col_means_map

Hint:

• Remember the syntax of map(): map(X, function_name)
```

Compare the syntax of the solutions of both exercises:

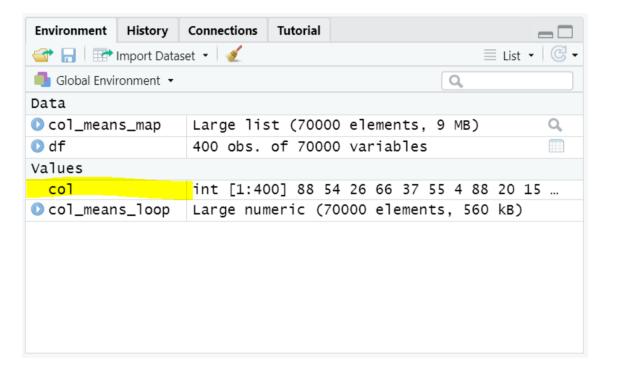
```
# Looping exercise
col_means_loop <- c()

for (col in df){
   col_means_loop <- append(col_means_loop, mean(col))
}

# Map exercise
col_means_map <- map(df, mean)</pre>
```

Do you remember which one ran faster?

Last but not least, remember we said that loops produce side effects?



- map() looks nice, doesn't it?
- But what about cases when it's impossible to implement the operations I want to apply in only one function? Do I have to use for loops then?
- Not at all! Let's get to the next section for those cases.

Writing your own functions

- As we have said several times, **R** is super flexible
- One example of that is that it's **super easy and quick to create custom functions**
- Here's how:

```
square <- function(x) {
  y <- x ^ 2
  return(y)
}</pre>
```

Exercise 8 (2 min)

Create a function named **zscore** that standardizes the values of a vector.

Hints:

- The command to obtain the mean of a vector is mean(x)
- The command to get the SD of a vector is sd(x)
- R is vectorized: you can operate vectors and numbers directly and the result will be a vector
- Don't forget to include the argument na.rm = TRUE in mean() and sd()
- Recall the syntax of custom functions in R:

```
function_name <- function(input) {
  output <- operation(input)
  return(output)
}</pre>
```

```
zscore <- function(x) {
    mean <- mean(x, na.rm = TRUE)
    sd <- sd(x, na.rm = TRUE)
    z <- (x - mean)/sd
    return(z)
}</pre>
```

Exercise 9 📟

- 1. Subselect the columns health_life_expectancy and freedom in whr
 - Use tidyverse's select() for this, as in: whr %>% select(freedom, happiness_score)
- 2. Use map() combined with the zscore function to get the z-score of these two columns and assign the resulting list to an object named z_scores
- 3. Use list indexing on z_scores to generate two new columns in whr with the standardized values of health_life_expectancy and freedom

Hints:

- Use the pipes (%>%) successively
- Remember that we don't use parenthesis next to the function name we're using map() with
- Remember that we use double brackets instead of single brackets to index the actual elements of a list

```
z_scores <- whr %>%
  select(health_life_expectancy, freedom) %>%
  map(zscore)
whr$hle_st <- z_scores[[1]]
whr$freedom_st <- z_scores[[2]]</pre>
```

Thank you!

Appendix

Appendix - Rhistory and RData

- .Rhistory automatically stores the commands entered in the console
- RData stores the objects in your environment only if you save your workspace, and loads them again in the next RStudio session
- Both files are relative to the working directory where your RStudio session started

Appendix - Using packages

Once a package is loaded, you can use its features and functions. Here's a list of some useful packages:

- Rcmdr easy to use GUI
- swirl an interactive learning environment for R and statistics.
- ggplot2 beautiful and versatile graphics (the syntax is a pain, though)
- stargazer awesome latex regression and summary statistics tables
- foreign reads .dta and other formats from inferior statistical software
- **zoo** time series and panel data manipulation useful functions
- data.table some functions to deal with huge data sets
- sp and rgeos spatial analysis
- multiwayvcov and sandwich clustered and robust standard errors
- RODBC, RMySQL, RPostgresSQL, RSQLite For relational databases and using SQL in R.

Appendix - Resources

- A discussion of folder structure and data managament can be found here: https://dimewiki.worldbank.org/wiki/DataWork_Folder
- For a broader discussion of data management, go to https://dimewiki.worldbank.org/wiki/Data_Management

Appendix - Git

Git is a version-control system for tracking changes in code and other text files. It is a great resource to include in your work flow.

We didn't cover it here because of time constraints, but below are some useful links, and DIME Analytics provides trainings on Git and GitHub, so keep an eye out for them.

- DIME Analytics git page: https://worldbank.github.io/dimeanalytics/git/
- A Quick Introduction to Version Control with Git and GitHub: https://journals.plos.org/ploscompbiol/article? id=10.1371/journal.pcbi.1004668

Appendix - More on R projects

If you want to learn more about them, we recommend starting here: https://r4ds.had.co.nz/workflow-projects.html

Appendix - Commenting

• To comment a line, write # as its first character

```
# This is a comment
print("But this part is not")
```

• You can also add # halfway through a line to comment whatever comes after it

```
print("This part is not a comment") # And this is a comment
```

- In Stata, you can use /* and */ to comment in the middle of a line's code. That is not possible in R: everything that comes after # will always be a comment
- To comment a selection of lines, press Ctrl + Shift + C

Appendix - Assignment 1

Exercise =

- 1. In your script panel, select all the lines of your script
- 2. Use the keyboard shortcut to comment these lines.
 - Shortcut: Ctrl + Shift + C
- 3. Use the keyboard shortcut to comment these lines again. What happened?

Appendix - Column extraction operators

- Remember the use of \$ to extract columns from a dataframe?
- Other than \$, we can also use double brackets to extract the column of a dataframe:

```
# With $:
whr$year

# With [[]]:
whr[["year"]] # Notice the use of double quotes
```

Appendix - Column extraction operators:



What's the key difference between them?

[1] 2015 2015 2015 2015 2015 2015

Well, [[]] lets us use other objects to refer to column names, while \$ doesn't

```
col_name <- "year"
head(whr$col_name) # this returns a NULL object because no column has the name "col_name" in whr

## Warning: Unknown or uninitialised column: `col_name`.

## NULL

col_name <- "year"
head(whr[[col_name]])</pre>
```

Appendix - Column extraction operators:



This difference is key because we can use [[]] to loop through column names, while this is not directly possible with \$.

```
# Printing the first observation of every column of whr
for (col in colnames(whr)) {
  whr[[col]] %>%
  head(1) %>%
  print()
}
```

```
## [1] "Switzerland"

## [1] "Western Europe"

## [1] 2015

## [1] 1

## [1] 7.587

## [1] 1.39651

## [1] 0.66557
```

- Apart from tidyverse's map(), base R also has a set of functions that allows users to apply a function to a number of objects without using explicit loops
- They're called apply and there are many of them, with different use cases
- If you look for the apply help file, you can see all of them
- We'll show only two of them, sapply and apply

• The syntax of sapply() is:

```
sapply(X, FUN, ...)
```

- Its main arguments are:
 - **X:** a data frame, matrix or vector the function will be applied to
 - **FUN:** the function you want to apply
- sapply() applies the function (FUN) to all the elements of X. If X is a data frame then the function is applied columnwise, while if it's a vector or a list it is applied item-wise
- The output of sapply() is usually a vector with the results, but it can be a matrix if the results have more than one dimension

```
# A for loop in R
for (number in c(1.2, 2.5)) {
   print(round(number))
}

# A much more elegant option
sapply(c(1.2, 2.5), round)
```

```
# Printing the first observation of every column of whr
for (col in names(whr)) {
   print(head(whr[[col]], 1))
} # Option 1

sapply(whr, head, 1) # A more elegant and efficient option
```

• A more general version of sapply() is the apply() function. This is its syntax:

```
apply(X, MARGIN, FUN, ...)
```

- Arguments:
 - X: a data frame (or matrix) the function will be applied to
 - MARGIN: 1 to apply the function to all rows or 2 to apply the function to all columns
 - **FUN:** the function you want to apply
- apply() applies a function (FUN) to all columns or rows of matrix (X). A value of 1 in MARGIN indicates that the funcion should be applied row-wise, while 2 indicates columns

```
matrix <- matrix(c(1, 24, 9, 6, 9, 4, 2, 74, 2), nrow = 3) # Defining a matrix
apply(matrix, 1, mean) # row means
apply(matrix, 2, mean) # column means</pre>
```

Appendix - Assignment 2

Exercise: Get the row max

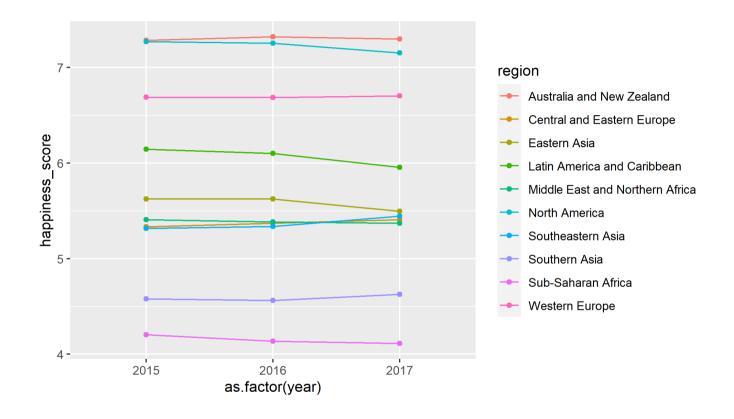
- 1. Select the columns freedom and happiness_score of whr
- 2. Use apply() to get the row max between these two columns, for every row
- Hints:
 - Remember the syntax of apply(): apply(X, MARGIN, FUN)
 - A value of 1 for MARGIN indicates that the function must applied row-wise
 - The function to get the maximum over a set of number is max

Solution:

```
whr %>%
  select(freedom, happiness_score) %>%
  apply(1, max)
```

```
# Here's some code
annualHappy_reg <- aggregate(happy_score ~ year + region, data = whr, FUN = mean)
ggplot(annualHappy_reg,aes(y = happy_score,x = as.factor(year), color = region, group = region)) +
geom_line() + geom_point()</pre>
```

```
# Here's the same code
annualHappy reg <-
  aggregate(happiness_score ~ year + region,
            data = whr,
            FUN = mean)
ggplot(annualHappy_reg,
       aes(y = happiness_score,
           x = as.factor(year),
           color = region,
           group = region)) +
geom_line() +
geom_point()
```



- R understands what unindented code says, but it can be quite difficult for a human being to read it
- On the other hand, white space does not have a special meaning for R, so it will understand code that is more readable for a human being

- Indentation in R looks different than in Stata:
 - To indent a whole line, you can select that line and press Tab
 - To unindent a whole line, you can select that line and press **Shift + Tab**
 - However, this will not always work for different parts of a code in the same line
- In R, we typically don't introduce white space manually
- It's rather introduced by RStudio for us

Appendix - Assignment 3

Exercise =

To see an example of how indenting works in RStudio, let's use an example with map():

```
# An elegant "loop" in R
map(c(1.2, 2.5, 9.1, 5.8), round)
```

- 1. Add a line between the two arguments of the function (the vector of numbers and round)
- 2. Now add a line between the numbers in the vector.

Note that RStudio formats the different arguments of the function differently: