Tidy evaluation:

Programming with ggplot2 and dplyr

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Motivation

Remove the duplication in this code

```
library(dplyr)
```

```
mtcars %>% group_by(cyl) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(cyl) %>% summarise(mean = mean(wt))
mtcars %>% group_by(gear) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(gear) %>% summarise(mean = mean(wt))
```

Typo: handout uses df, x1, y1 etc. instead of real variables in mtcars.

Your turn

Identify the parts that change.

Give them names.

Make a function.

Does it work?

Remove the duplication in this code

```
mtcars %>% group_by(cyl) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(cyl) %>% summarise(mean = mean(wt))
mtcars %>% group_by(gear) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(gear) %>% summarise(mean = mean(wt))
```

First identify the parts that change

```
mtcars %>% group_by(cyl) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(cyl) %>% summarise(mean = mean(wt))
mtcars %>% group_by(gear) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(gear) %>% summarise(mean = mean(wt))
```

Then give them names

```
mtcars %>% group_by(cyl) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(cyl) %>% summarise(mean = mean(wt))
mtcars %>% group_by(gear) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(gear) %>% summarise(mean = mean(wt))
```

Now make a function

```
grouped_mean <- function(df, group_var, summary_var) {
    df %>%
        group_by(group_var) %>%
        summarise(mean = mean(summary_var))
}
```

It doesn't work

```
grouped_mean <- function(df, group_var, summary_var) {</pre>
  df %>%
     group_by(group_var) %>%
     summarise(mean = mean(summary_var))
grouped_mean(mtcars, cyl, mpg)
#> Error: Column `group_var` is unknown
```

Vocabulary

We need some new vocabulary

```
Evaluated using
           usual R rules
(x - min(x)) / (max(x) - min(x))
mtcars %>%
  group_by(cyl) %>%
  summarise(mean = mean(mpg))
```

Automatically **quoted** and evaluated in a "non-standard" way

You're already familiar with this idea

```
df <- data.frame(
    y = 1,
    var = 2
)

df$y</pre>
```

```
var <- "y"
df$var</pre>
```

Predict the output!

\$ automatically quotes the variable name

```
df <- data.frame(</pre>
  y = 1,
  var = 2
df$y
#> [1] 1
var <- "y"
df$var
#> [1] 2
```

If you want refer indirectly, must use [[instead

```
df <- data.frame(</pre>
  y = 1,
  var = 2
var <- "y"
df[[var]]
#> [1] 1
```

| | Quoted | Evaluated |
|----------|---------------|------------------------------------|
| Direct | df\$ <u>y</u> | ??? |
| Indirect | ??? | <pre>var <- "y" df[[var]]</pre> |

| | Quoted | Evaluated |
|----------|---------------|------------------------------------|
| Direct | df\$ <u>y</u> | df[["y"]] |
| Indirect | ??? | <pre>var <- "y" df[[var]]</pre> |

Quoted Evaluated Direct df[["y"]] df\$y var <- "y" Indirect df[[var]]

Identify which arguments are auto-quoted

```
library(MASS)
mtcars2 <- subset(mtcars, cyl == 4)</pre>
with(mtcars2, sum(vs))
sum(mtcars2$am)
rm(mtcars2)
```

Can't tell? Try running the argument alone

```
library(MASS)
#> Works

MASS
#> Error: object 'MASS' not found

# -> The 1st argument of library() is quoted
```

Can't tell? Try running the argument alone

```
subset(mtcars, cyl == 4)
#> Works

cyl == 4
#> Error: object 'cyl' not found

# -> The 2nd argument of subset() is quoted
```

You can now identify the quoted arguments

```
Evaluated using
library(MASS)
                           usual R rules
mtcars2 <- subset(mtcars, cyl == 4)</pre>
                                  Automatically quoted and evaluated
with(mtcars2, sum(vs))
                                       in a "non-standard" way
sum(mtcars2$am)
rm(mtcars2)
```

Base R has 3 primary ways to "unquote"

| Quoted/Direct | Evaluated/Indirect | |
|------------------------|---|--------------------------------|
| df\$ <u>y</u> | x <- "y" df[[x]] | Use a different function |
| rm(<u>mtcars</u>) | x <- "mtcars" rm(list = x) | Use a different argument |
| library(<u>MASS</u>) | <pre>x <- "MASS" library(x, character.only = TRUE)</pre> | Specify an additional argument |

Identify which arguments are auto-quoted

```
library(tidyverse)
mtcars %>% pull(am)
by_cyl <- mtcars %>%
 group_by(cyl) %>%
  summarise(mean = mean(mpg))
ggplot(by_cyl, aes(cyl, mean)) + Typo
 geom_point()
```

Identify which arguments are auto-quoted

```
library(tidyverse)
mtcars %>% pull(am)
by_cyl <- mtcars %>%
  group_by(cyl) %>%
  summarise(mean = mean(mpg))
ggplot(by_cyl, aes(cyl, mean)) +
  geom_point()
```

| | Quoted | Evaluated | Tidy |
|----------|---------------|-------------------------|-------------|
| Direct | df\$ <u>y</u> | df[["y"]] | pull(df, y) |
| Indirect | | var <- "y" df[[var]] | ??? |

| | Quoted | Evaluated | Tidy |
|----------|---------------|------------------------------------|---|
| Direct | df\$ <u>y</u> | df[["y"]] | pull(df, <u>y</u>) |
| Indirect | | <pre>var <- "y" df[[var]]</pre> | <pre>var <- quo(y) pull(df, !!var)</pre> |

Everywhere in the tidyverse uses!! to unquote

Pronounced

```
x_var <- quo(cyl)</pre>
                                      bang-bang
y_var <- quo(mpg)</pre>
by_cyl <- mtcars %>%
  group_by(!!x_var) %>%
  summarise(mean = mean(!!y_var))
ggplot(by_cyl, aes(!!x_var, mean)) +
  geom_point()
```

Rewrite to specify the column indirectly

```
var <- quo(cyl)</pre>
# Re-write to specify column indirectly
mtcars %>%
  summarise(
    avg = mean(cyl),
    sd = sd(cyl),
    n = sum(!is.na(cyl))
```

Rewrite to specify the column indirectly

```
var <- quo(cyl)</pre>
# Re-write to specify column indirectly
mtcars %>%
  summarise(
    avg = mean(!!var),
    sd = sd(!!var),
    n = sum(!is.na(!!var))
# 1 6.1875 1.785922 32
```

Rewrite to specify the column indirectly

```
Change in one place
var <- quo(mpg)</pre>
# Re-write to specify column indirectly
mtcars %>%
  summarise(
    avg = mean(!!var),
    sd = sd(!!var),
    n = sum(!is.na(!!var))
# 1 20.09062 6.026948 32
```

A recipe for:

Wrapping quoting functions

(More theory later...)

New: Identify quoted vs. evaluated arguments

```
mtcars %>% group_by(cyl) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(cyl) %>% summarise(mean = mean(wt))
mtcars %>% group_by(gear) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(gear) %>% summarise(mean = mean(wt))
```

Typo: handout uses df, x1, y1 etc. instead of real variables in mtcars.

New: Identify quoted vs. evaluated arguments

```
mtcars %>% group_by(cyl) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(cyl) %>% summarise(mean = mean(wt))
mtcars %>% group_by(gear) %>% summarise(mean = mean(mpg))
mtcars %>% group_by(gear) %>% summarise(mean = mean(wt))
```

Then identify the parts that could change

```
mtcars  %>% group_by(cyl)  %>% summarise(mean = mean(mpg))
mtcars  %>% group_by(cyl)  %>% summarise(mean = mean(wt))
mtcars  %>% group_by(gear)  %>% summarise(mean = mean(mpg))
mtcars  %>% group_by(gear)  %>% summarise(mean = mean(wt))
```

These become the function arguments

Next write the function template & identify quoted arguments

```
grouped_mean <- function(df, group_var, summary_var) {</pre>
   df %>%
     group_by(group_var) %>%
     summarise(mean = mean(summary_var))
```

New: Wrap every quoted argument in enquo()

```
grouped_mean <- function(df, group_var, summary_var) {</pre>
   group_var <- enquo(group_var)</pre>
   summary_var <- enquo(summary_var)</pre>
   df %>%
     group_by(group_var) %>%
     summarise(mean = mean(summary_var))
```

New: And then unquote with!!

```
grouped_mean <- function(df, group_var, summary_var) {</pre>
   group_var <- enquo(group_var)</pre>
   summary_var <- enquo(summary_var)</pre>
   df %>%
     group_by(!!group_var) %>%
     summarise(mean = mean(!!summary_var))
```

What happens when you call grouped_mean()?

```
grouped_mean(mtcars, cyl, mpg)
grouped_mean <- function(df, group_var, summary_var) {</pre>
   group_var <- enquo(group_var)</pre>
   summary_var <- enquo(summary_var)</pre>
   df %>%
     group_by(!!group_var) %>%
     summarise(mean = mean(!!summary_var))
```

What happens when you call grouped_mean()?

```
grouped_mean(mtcars, cyl, mpg)
grouped_mean <- function(df, group_var, summary_var) {</pre>
   group_var <- quo(cyl)</pre>
   summary_var <- quo(mpg)</pre>
   df %>%
     group_by(!!group_var) %>%
     summarise(mean = mean(!!summary_var))
```

What happens when you call grouped_mean()?

```
grouped_mean(mtcars, cyl, mpg)
grouped_mean <- function(df, group_var, summary_var) {</pre>
   group_var <- quo(cyl)</pre>
   summary_var <- quo(mpg)</pre>
   df %>%
     group_by(cyl) %>%
     summarise(mean = mean(mpg))
```

Reduce the duplication here

```
mtcars %>% summarise(avg = mean(cyl), sd = sd(cyl), n = sum(!is.na(cyl)))
mtcars %>% summarise(avg = mean(mpg), sd = sd(mpg), n = sum(!is.na(mpg)))
mtcars %>% summarise(avg = mean(disp), sd = sd(disp), n = sum(!is.na(disp)))
```

Reduce the duplication here

```
mtcars %>% summarise(avg = mean(cyl), sd = sd(cyl), n = sum(!is.na(cyl)))
mtcars %>% summarise(avg = mean(mpg), sd = sd(mpg), n = sum(!is.na(mpg)))
mtcars %>% summarise(avg = mean(disp), sd = sd(disp), n = sum(!is.na(disp)))
```

New: Identify quoted vs. evaluated arguments

```
mtcars %>% summarise(avg = mean(cyl), sd = sd(cyl), n = sum(!is.na(cyl)))
mtcars %>% summarise(avg = mean(mpg), sd = sd(mpg), n = sum(!is.na(mpg)))
mtcars %>% summarise(avg = mean(disp), sd = sd(disp), n = sum(!is.na(disp)))
```

Then identify the parts that could change

These become the function arguments

Next write the function template & identify quoted arguments

```
summarise_column <- function(df, var){</pre>
 df %>%
    summarise(avg = mean(var),
               sd = sd(var),
               n = sum(!is.na(var)))
```

New: Wrap every quoted argument in enquo()

```
summarise_column <- function(df, var){</pre>
  var <- enquo(var)</pre>
  df %>%
    summarise(avg = mean(var),
               sd = sd(var),
               n = sum(!is.na(var)))
```

New: And then unquote with!!

```
summarise_column <- function(df, var){</pre>
  var <- enquo(var)</pre>
  df %>%
    summarise(avg = mean(!!var),
               sd = sd(!!var),
               n = sum(!is.na(!!var)))
```

Try it out!

```
summarise_column <- function(df, var){</pre>
  var <- enquo(var)</pre>
  df %>%
    summarise(avg = mean(!!var),
               sd = sd(!!var),
               n = sum(!is.na(!!var)))
summarise_column(mtcars, cyl)
       avg
# 1 6.1875 1.785922 32
```

Plays nicely with other tools

```
# Fits in a dplyr pipeline
mtcars %>%
  group_by(cyl) %>%
  summarise_column(mpg)
# Use purrr to iterate
my_cols <- list(quo(cyl), quo(mpg), quo(disp))</pre>
map(my_cols, summarise_column, df = mtcars)
```

Plays nicely with other tools

```
# Fits in a dplyr pipeline
mtcars %>%
  group_by(cyl) %>%
  summarise_column(mpg)
# Use purrr to iterate Plural version for a list
my_cols <- quos(cyl, mpg, disp)</pre>
map_dfr(my_cols, summarise_column, df = mtcars)
```

Is it worth it?

It saves a lot of typing

```
filter(diamonds, x > 0 & y > 0 & z > 0)
# VS
diamonds[
 diamonds$x > 0 &
  diamonds$y > 0 &
  diamonds$z > 0,
```

It saves a lot of typing

```
filter(diamonds, x > 0 & y > 0 & z > 0)
# VS
diamonds[
  diamonds[["x"]] > 0 &
  diamonds[["y"]] > 0 &
  diamonds[["z"]] > 0,
```

And makes it possible to translate to other languages

```
con <- DBI::dbConnect(RSQLite::SQLite(), filename = ":memory:")</pre>
mtcars_db <- copy_to(con, mtcars)</pre>
mtcars_db %>%
  filter(cyl > 2) %>%
  select(mpg:hp) %>%
  head(10) %>%
  show_query()
#> SELECT 'mpg', 'cyl', 'disp', 'hp'
#> FROM `mtcars`
#> WHERE (`cyl` > 2.0)
#> LIMIT 10
```

Tidy evaluation = principled NSE

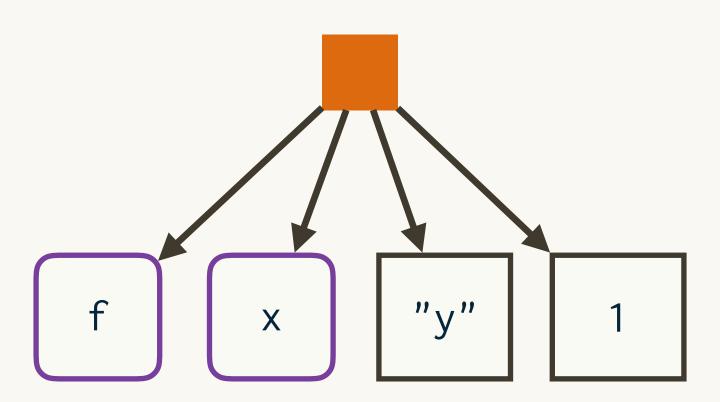


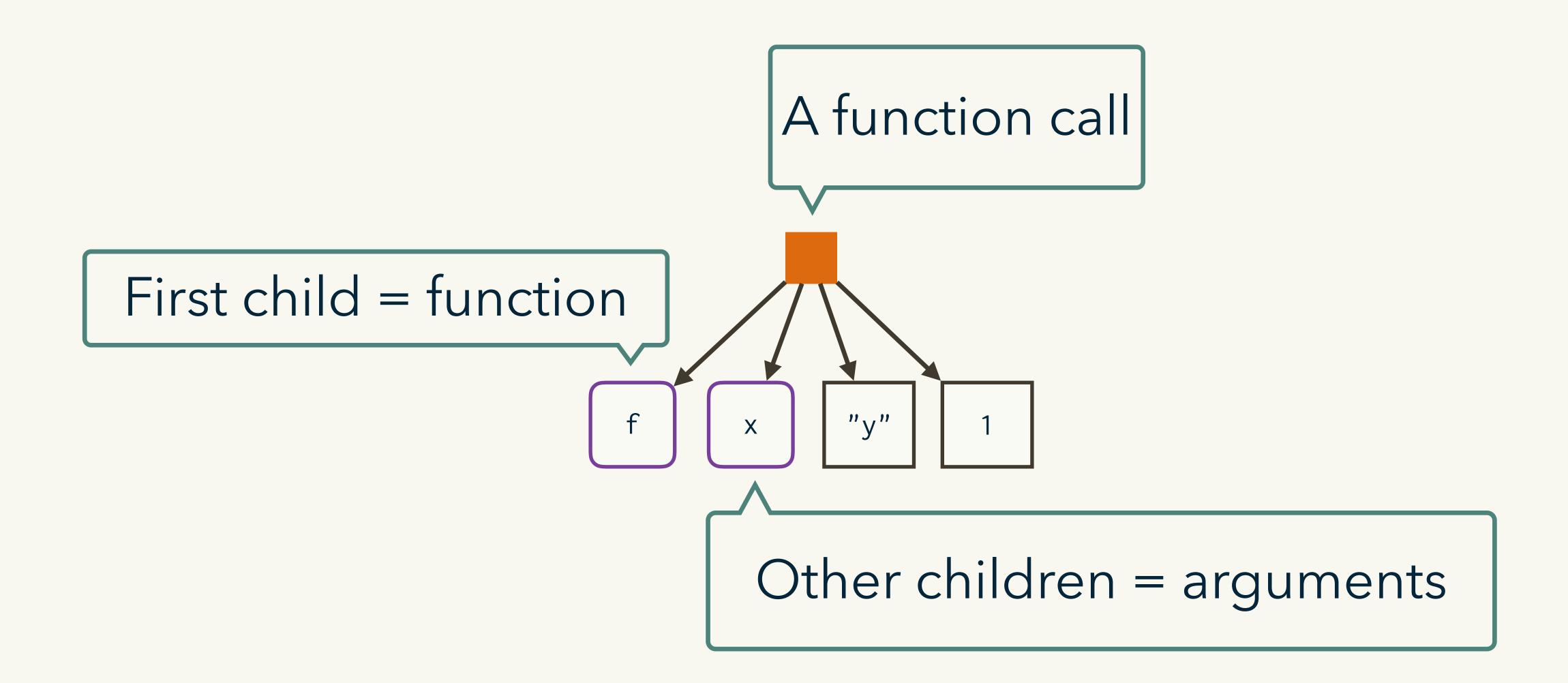
Now for some game theory

- 1. R code is a tree
- 2. Unquoting builds trees
- 3. Environments map names to values

R code is a tree

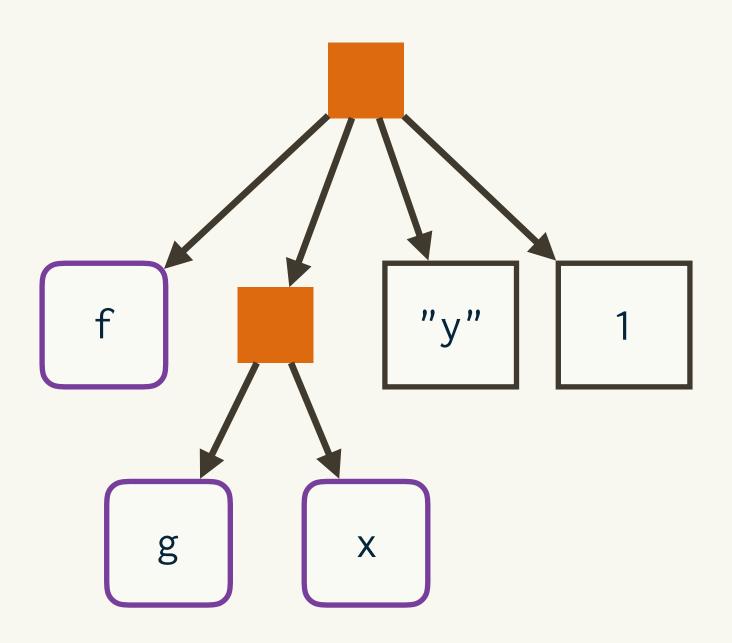






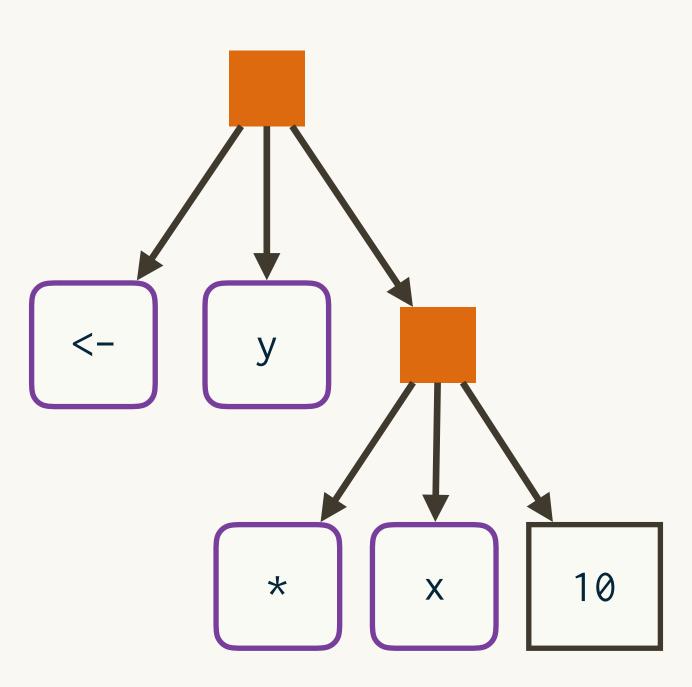
More complex calls have multiple levels





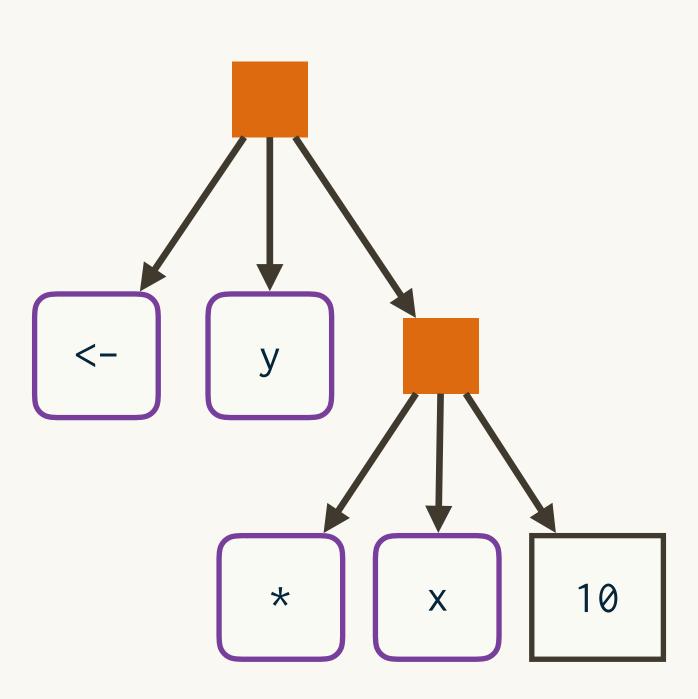
Every expression has a tree





Because every expression can be rewritten





You can see this yourself with lobstr::ast()

```
> lobstr::ast(if(x > 5) y + 1)
— ` i f `
—X
```

Your turn

```
library(lobstr)
# Compare to my hand drawn diagrams
ast(f(x, "y", 1))
ast(y < - x * 10)
# What does this tree tell you?
ast(function(x, y) {
  if (x > y) {
  } else {
```

What isn't in the AST?

```
ast(1 + 2)
ast({
   1
   # comment
   2
})
```

Unquoting builds trees

expr() captures your expression

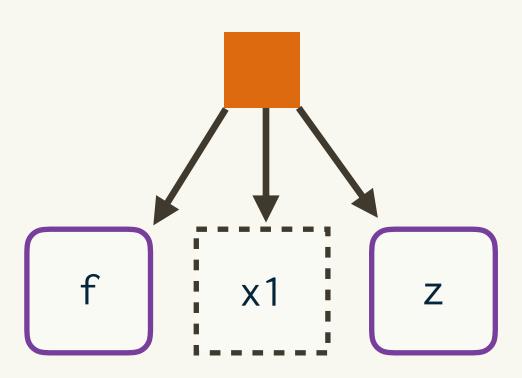
```
library(rlang)
expr(y + 1)
#> y + 1
```

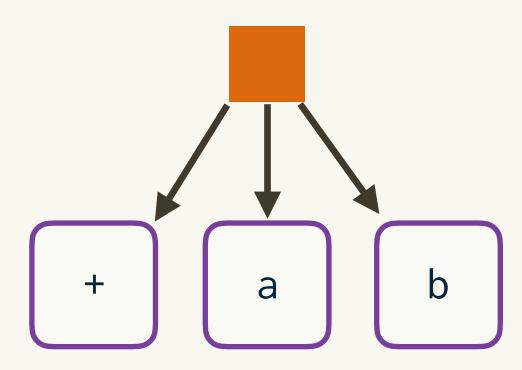
Unquoting allows you to build your own trees

```
x1 <- expr(a + b)
expr(f(!!x1, z))
#> f(a + b, z)

# !! is called the unquoting operator
# And is pronounced bang-bang
```

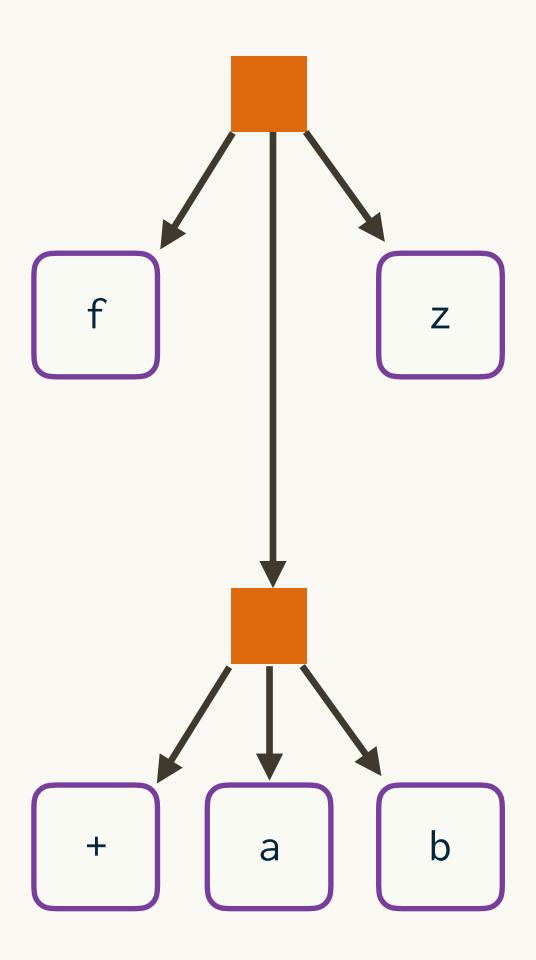
expr(f(!!x1, z))



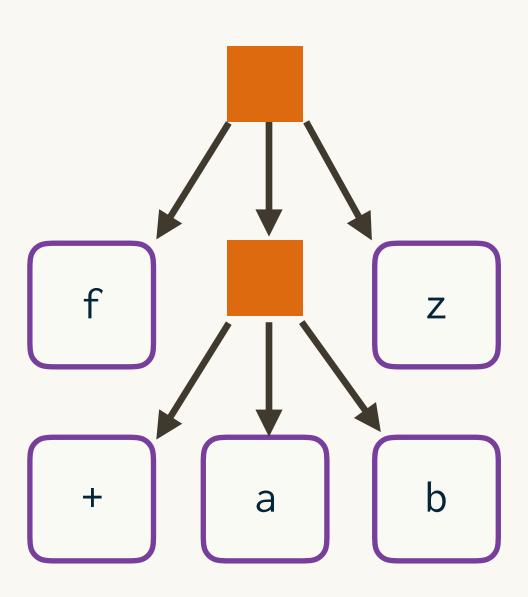


x1 <- expr(a + b)

expr(f(!!x1, z))



expr(f(!!x1, z))



```
ex1 <- expr(x + y)

ex2 <- expr(!!ex1 + z)

ex3 <- expr(1 / !!ex1)
```

```
ex1 <- expr(x + y)
# x + y
ex2 <- expr(!!ex1 + z)
ex3 <- expr(1 / !!ex1)
```

```
ex1 <- expr(x + y)

# x + y

ex2 <- expr(!!ex1 + z)

# x + y + z

ex3 <- expr(1 / !!ex1)
```

```
ex1 <- expr(x + y)

# x + y

ex2 <- expr(!!ex1 + z)

# x + y + z

ex3 <- expr(1 / !!ex1)

# 1 / (x + y)

# Not 1 / x + y
```

Recreate these expressions

```
# Using:
var <- expr(cyl)</pre>
df <- expr(mtcars)</pre>
f <- expr(foo)
# Recreate these expressions:
# mean(log(cyl))
\# lm(cyl \sim 1, data = mtcars)
\# foo(x = cyl)
```

Recreate these expressions

```
# Using:
var <- expr(cyl)</pre>
df <- expr(mtcars)</pre>
f <- expr(foo)
# Recreate these expressions:
expr(mean(log(!!var)))
# mean(log(cyl))
expr(lm(!!var ~ 1, data = !!df))
\# lm(cyl \sim 1, data = mtcars)
expr((!!f)(x = !!var))
\# foo(x = cyl)
```

enexpr() lets you capture user expressions

```
# expr() quotes your expression
f1 <- function(z) expr(z)
f1(a + b)
#> Z
# enexpr() quotes user's expression
f2 <- function(z) enexpr(z)
f2(x + y)
\#> x + y
```

Environments map names to values

```
add_y <- function(df, var) {</pre>
  n <- 10
  var <- enexpr(var)</pre>
  mutate(df, y = !!var)
df <- tibble(x = 1)
n <- 100
add_y(df, x + n)
#> 1 1.00 11
```

```
add_y <- function(df, var) {</pre>
  var <= enexpr(var)
mutate(df, y = !!var)</pre>
df <- tibble(x = 1)
n <- 100
add_y(df, x + n)
#> 1 1.00 11
```

```
add_y <- function(df, var) {</pre>
  n <- 10
  var <- enexpr(var)</pre>
  mutate(df, y = !!var)
df <- tibble(x = 1)
n <- 100
add_y(df, x + n)
#> 1 1.00 11
```

```
add_y <- function(df, var) {</pre>
  n <- 10
  var <- expr(x + n)
  mutate(df, y = !!var)
df <- tibble(x = 1)
n <- 100
add_y(df, x + n)
#> 1 1.00 11
```

```
add_y <- function(df, var) {</pre>
  n <- 10
  var <- expr(x + n)
  mutate(df, y = x + n)
df <- tibble(x = 1)
n <- 100
add_y(df, x + n)
#> 1 1.00 11
```

quo() captures expression and environment

```
# quo() quotes your expression
f1 <- function(z) quo(z)
f1(a + b)
#> <quosure>
#> expr: ^z
#> env: 0x10d3b9308
# enquo() quotes user's expression
f2 <- function(z) enquo(z)
f2(x + y)
#> <quosure>
    expr: ^{x} + y
#>
         0x10d3b9309
    env:
```

| | Function author | Function user |
|--------------------------|-----------------|---------------|
| Expression | expr(x) | enenxpr(x) |
| Expression + environment | quo(x) | enquo(x) |
| | | Think enrich |

```
add_y <- function(df, var) {</pre>
  n <- 10
  var <- enquo(var)</pre>
  mutate(df, y = !!var)
df <- tibble(x = 1)
n <- 100
add_y(df, x + n)
#> 1 1.00 101
```

```
add_y <- function(df, var) {</pre>
  n <- 10
  var <- enquo(var)</pre>
  mutate(df, y = !!var)
df \le tibble(x = 1)
add_y(df, x + n)
#> 1 1.00 101
```

Key pattern is to quote and unquote

```
df <- data.frame(x = 1:5, y = 5:1, z = \emptyset:4) \ \
filter(df, abs(x) > 1e-3)
filter(df, abs(y) > 1e-3)
filter(df, abs(z) > 1e-3)
my_filter {Quote on(df, var) {
  var <- enquo(var)</pre>
  filter(df, abs(!!var) > 1e-3)
my_filter(df, x) Unquote
```

Case Study

Switch to project

case_study

Your Turn

Open 03-report.R

Adapt summarise_weekly() to remove dependence on exact column names.

E.g. should be able to specify as arguments the columns for the: date, variable to be summarised, and a grouping variable.

Your Turn

```
summarise_weekly <- function(data){</pre>
  data %>%
    mutate(week = lubridate::week(date)) %>%
    group_by(type, week) %>%
    summarise(
      date = first(date),
      n = sum(!is.na(n_sales)),
      mean = mean(n_sales, na.rm = TRUE))
```

Your Turn

```
summarise_weekly <- function(data, date, var, group){</pre>
  date <- enquo(date)</pre>
  var <- enquo(var)</pre>
  group <- enquo(group)</pre>
  data %>%
    mutate(week = lubridate::week(!!date)) %>%
    group_by(!!group, week) %>%
    summarise(
      date = first(!!date),
      n = sum(!is.na(!!var)),
      mean = mean(!!var, na.rm = TRUE))
all_states_weekly <- map(all_states, summarise_weekly,
  date = date, var = n_sales, group = type)
```

How could plot_weekly() be improved?

```
plot_weekly <- function(data, title){</pre>
 data %>%
    ggplot(aes(date, mean, color = type)) +
    geom_point(size = 3) +
    geom_line(alpha = 0.5) +
    labs(title = title,
      x = "Week starting",
      y = "Average number of sales per day") +
    theme_bw() +
    scale_color_brewer(type = "qual")
```

How could plot_weekly() be improved?

```
plot_ts <- function(data, x, y, group, title = ""){</pre>
 x < - enquo(x)
  y <- enquo(y)</pre>
  group <- enquo(group)</pre>
  data %>%
    ggplot(aes(!!x, !!y, color =!!group)) +
    geom_point(size = 3) +
    geom_line(alpha = 0.5) +
    labs(title = title,
      x = "Week starting",
      y = "Average number of sales per day") +
    theme_bw() +
    scale_color_brewer(type = "qual")
all_states_plots <- map2(all_states_weekly, states_long_names, plot_ts,
x = date, y = mean, group = type)
```

Hopefully, the end result is code that is easier to

04-report.R

```
library(tidyverse)
library(fs)
source("functions.R")
# Get file names and paths to data
files <- dir("data") %>% path_ext_remove()
file_paths <- path("data", files, ext = "csv")</pre>
states <- str_sub(files, 1, 2)</pre>
states_long_names <- c(</pre>
 "OR" = "Oregon",
 "BC" = "British Columbia",
 "WA" = "Washington")[states]
# Check data isn't too old ------
ages <- check_not_outdated(file_paths)</pre>
# Import data ----------
all_states <- map(file_paths, read_csv)</pre>
# Summarise by week -------
all_states_weekly <- map(all_states, summarise_weekly,
 date = date, var = n_sales, group = type)
# Plot weekly summary -------
all_states_plots <- map2(all_states_weekly, states_long_names, plot_ts,</pre>
 x = date, y = mean, group = type)
```

- 1. understand,
- 2. maintain, and
- 3. extend

Once you embrace this workflow use tibbles + dplyr

See 05-report.R

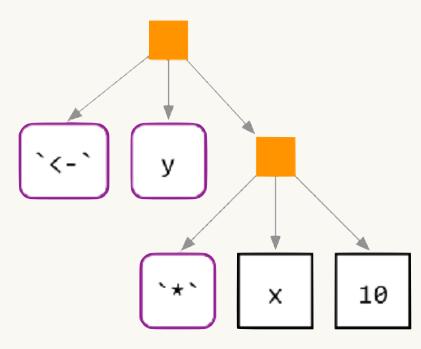
Challenge

Extend the analysis to create the weekly plots for all three variables: n_sales, total_dollar_amount, n_existing_customer.

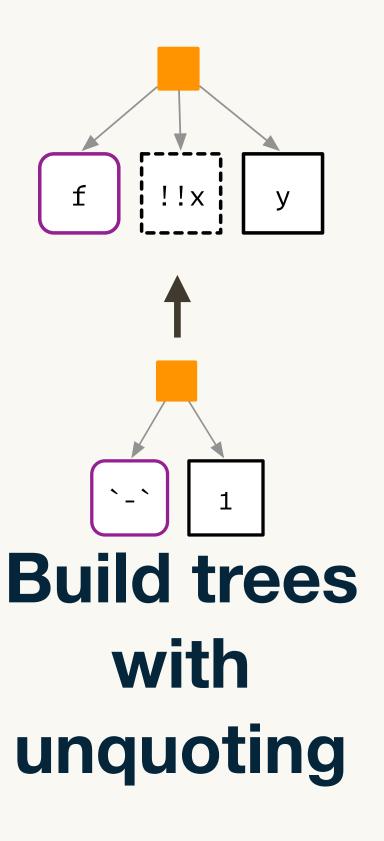
Learning more

Theory https://youtu.be/nERXS3ssntw

Code is a tree



enquo()



https://adv-r.hadley.nz/expressions.html https://adv-r.hadley.nz/quasiquotation.html https://adv-r.hadley.nz/evaluation.html

Practice



Adapted from *Tidy Tools* by Hadley Wickham

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