

Manipulating Data with "dplyr"

OVERVIEW

- Introduction to dplyr
- Built-in functions
 - > filter/select
 - arrange, mutate/transmute
 - summarise
- Join data sets
- Groupwise operations
 - group_by & summarise

dplyr

- We have now covered the major data structures, built-in functions, and programming features of R. *In principle*, we can do anything. In practice, using R effectively involves learning a variety of packages to simplify your tasks.
- Today we will look at **dplyr**. It provides a set of functions, somewhat similar to database query-type operations, that help efficiently manipulate data frames.
 - Filtering & rearranging: Built-in functions to do basic transformations.
 - Joins: When the analysis requires information from multiple data frames.
 - Groupwise operations: When analysis requires aggregation.



Basic dplyr Functions

- dplyr is based on surprisingly few operations which we will study in detail:
 - filter Take subsets of rows
 - select Take subsets of columns
 - arrange Reorder rows
 - mutate/transmute Add or replace columns
 - summarise Compute aggregate values
 - Joins Various "join" methods to combine multiple data frames.

Baby Births Dataset

We introduce the sample data sets we will use during class today.
births.csv contains counts of boys and girls born in each year.

bnames.csv is a much larger file giving information on babies with different names born in each year. For each year and child, the prop column gives the percentage of boys or girls given that name in that year. The soundex column gives the soundex code, which descibes the pronunciation of that name (see en.wikipedia.org/wiki/Soundex).

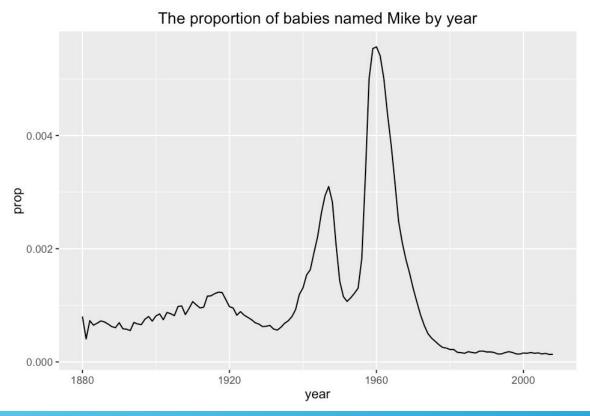
```
bnames <- read.csv("bnames.csv",</pre>
                   stringsAsFactors = FALSE)
head(bnames, 5)
                  prop sex soundex
         name
 year
1 1880
         John 0.081541 boy
                              J500
2 1880 William 0.080511 boy W450
3 1880 James 0.050057 boy
                              J520
4 1880 Charles 0.045167 boy C642
5 1880
       George 0.043292 boy
                              G620
```



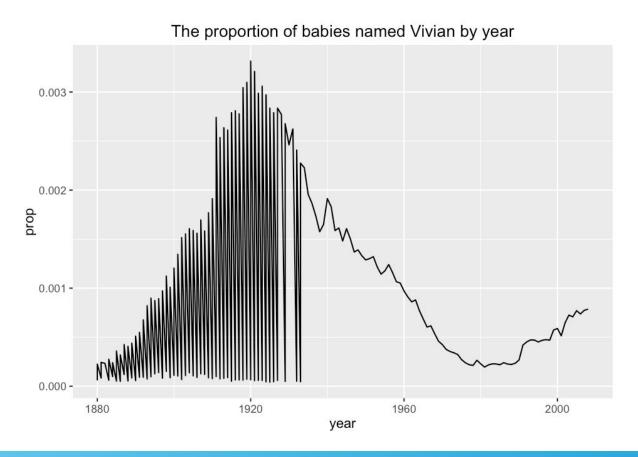
We might want to ask: How has the percentage of each name evolved since 1880? For example:

The code above selects the rows with name "Mike". We see that for each year the percentage of the name changes. This can be better seen with visualization.

The graph below is plotted with ggplot2, a package we will cover in a separate class. It plots how popular the name "Mike" was in each year. It reached its peak popularity in 1960.

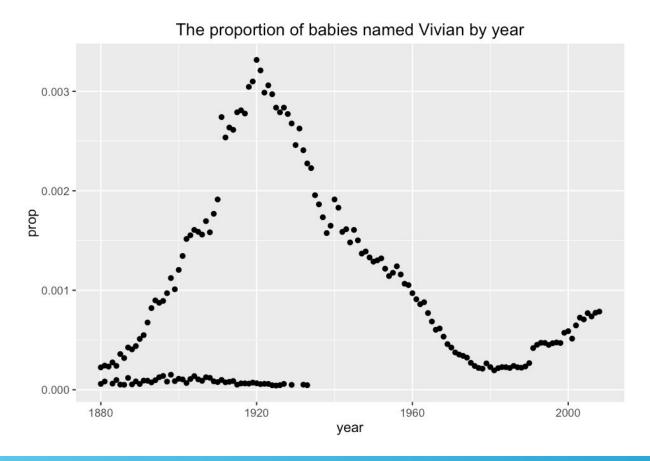


We see a problem if we visualize the name Vivian. Why does the proportion seem to be oscillating so frequently?

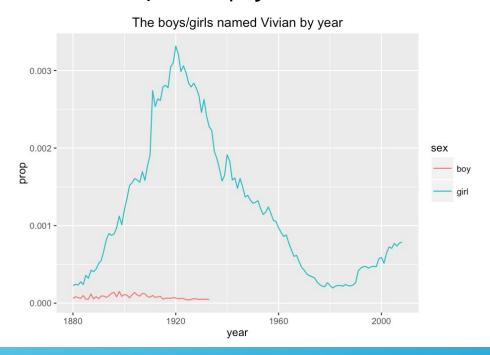




Let's try sketching a scatterplot instead. What do you think causes the oscillation from the previous slide?



From the scatter plot, it seems that there are actually *two* curves, instead of an oscillating one. With more careful investigation, we see that the two curves represent different genders. It turns out that Vivian was once a fairly common *boy*'s name. In the class today, we survey the tools that facilitate this kind of analysis in dplyr.





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Built-in Functions

- We start with some built-in function in dplyr. Most of what we're doing here can be done with basic programming methods as well; however, dplyr provides a friendlier syntax as well as a better data storage method that improves efficiency. We will take a look at the functions:
 - filter
 - > select
 - arrange
 - mutate/transmute
 - summarise
- We will see that the functions listed above all take a data frame as their first argument and the "instructions" in their second argument. They all return a data frame.



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Built-in Functions

We first construct a toy sample:

```
df = data.frame(
  color = c("blue","black", "blue", "blue","black"),
  value = 1:5)
df
  color value
1  blue    1
2  black    2
3  blue    3
4  blue    4
5  black    5
```

We'll want to import the dplyr package as well:

```
library(dplyr)
```



filter

We then use the function filter to select the rows whose color is blue:

```
filter(df, color == "blue")
  color value
1  blue    1
2  blue    3
3  blue    4
```

As we've seen before, this can also be done by ordinary slicing:

```
df[df$color == "blue",]
```

The filter function has a simpler syntax; while the difference may be slight here, it will pay off as we do more complex things.

filter

The first parameter of filter() is the data frame and the second is the filtering condition. (Note that we don't have to write "df\$" when referring to a column of df.)

```
filter(df, value %in% c(3, 4, 5))
  color value
1 blue   3
2 blue   4
3 black   5
```

Logical operators like and (&) can be used as well:

```
filter(df, value %in% c(3, 4, 5) & color=='blue')
  color value
1  blue   3
2  blue   4
```

filter

Another example of logical operators using the or (|):

```
filter(df, value %in% c(1, 4) | color=="black")
  color value
1  blue    1
2  black    2
3  blue    4
4  black    5
```

The second parameter is essentially broken down into a logical vector:

```
filter(df, c(T,F,F,F,T))
  color value
1  blue   1
2  black   5
```

The select() function, like filter(), is used for slicing a data frame. select picks columns with column names (instead of picking rows with conditions).

```
select(df, color)
  color
1 blue
2 black
3 blue
4 blue
5 black
```

You can select multiple columns:

```
select(df, color, value)
  color value
1 blue 1 #...some rows omitted...
```

select can exclude columns by the "-" notation as well:

```
select(df, -color)
  value
1    1
2    2
3    3
4    4
5    5
```

We can specify the columns by indexes instead of names:

```
select(df, 1)
  color
1 blue
2 black
3 blue #...some rows omitted...
```

- When given integer arguments, select uses column numbers in the original data frame, not in any subsequential data frame. What do you think select(df, -1, -1) does?
- You might think this call first removes column 1 (color) and then removes the new column 1 (value), returning an empty data frame; this is not the case. The call select(df, -1, -1) is the same as the call select(df, -1).
- To remove both columns, instead wen can use the call select(df, -1,
 -2) or select(df, -2, -1):

```
select(df, -1, -2)
data frame with 0 columns and 5 rows
```

It is possible to nest statements as well. What if we nested a selection statement with a negative index?

```
select(select(df, -1), -1)
data frame with 0 columns and 5 rows
```

Why does this occur when it didn't work the same for the previous select(df, -1, -1) statement?

It is important to note that selection is performed in a linear fashion, from left to right. Consider the statement below:

```
select(df, -1, 1)

value color
1    1 blue
2    2 black
3    3 blue
4    4 blue
5    5 black
```

First column 1 (color) is removed. At this point, there is only the column (value) left. Afterwards, column 1 from the original data frame is added back (color). Ultimately, we just ended up flipping the column order.

What happens if we reverse the order of the indices?

```
select(df, 1, -1)
data frame with 0 columns and 5 rows
```

This time, column 1 is selected first (color). At this point, column 2 (value) is removed and only the column 1 (color) is left in the data frame. Then, when we remove column 1, nothing is left. Thus, we ultimately ended up with an empty data frame.

- The function select, unlike filter, cannot take logical vectors; however, it provides some functions to select columns by certain conditions. These, and others, can be used as the second argument of select:
 - > starts_with(x, ignore.case=T): pick column names starting with x, case insensitive when ignore.case is (by default) set true.
 - ends_with(x, ignore.case=T): pick column names ending with x.
 - contains(x, ignore.case=T): pick column names containing x.
 - matches(x, ignore.case=T): pick columns whose names match x, where x is a regular expression.
 - one_of(name_1, name_2, ..., name_n): pick columns that have any of the names in the list. (The argument can also be a character vector.)



We demonstrate the usage of the functions from the previous slide:

```
select(df, starts_with('c'))
  color
1 blue
2 black
3 blue
4 blue
5 black
select(df, contains('e'), starts_with('c'))
  value color
     1 blue
  2 black
     3 blue
   4 blue
     5 black
```

Another benefit of select is that it can be used to rename a column. While selecting, if we specify new-column-name = original-column-name in the second parameter of select, we will rename the selected column in the resulting data frame:

```
select(df, COLOR=color)
  COLOR
1  blue
2  black
3  blue
4  blue
5  black
```

select and rename

If we desire to just rename columns without selecting a subset of columns, we could simply use the rename() function. The syntax is similar, but the function just renames and returns the whole (new) data frame:

select and rename

• We remark here that select() and rename() are both non-mutating functions. Remember, they do not change the original data frame, but instead produce a *new* data frame. Even after doing all of the previous operations, we can see that the original data frame is unchanged:

2	
color	value
blue	1
black	2
blue	3
blue	4
black	5
	blue black blue blue

If we would like to change df, we would have to use assignment:

```
df = rename(df, COLOR = colors)
```



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arrange

The function arrange() positions the rows of the data frame in ascending order according to the values in the specified column:

```
arrange(df, value)
color value

1 blue 1
2 black 2
3 blue 3
4 blue 4
5 black 5
```

arrange

If we would like the column sorted in descending order, we can apply the function desc() to the column name:

```
arrange(df, desc(value))
color value

1 black 5
2 blue 4
3 blue 3
4 black 2
5 blue 1
```

arrange

arrange can also be used to order strings alphabetically as well:

```
arrange(df, color)
color value

1 black 2
2 black 5
3 blue 1
4 blue 3
5 blue 4
```

mutate

The function mutate() can be used to create a new column by deriving its value from an old column. For example, the code below doubles the numbers in value and also creates a new column called double.

mutate

mutate can create multiple columns all at once:

```
mutate(df, double = 2 * value, quadruple = 4 * value)

color value double quadruple
1 blue 1 2 4
2 black 2 4 8
3 blue 3 6 12
4 blue 4 8 16
5 black 5 10 20
```

transmute

It is possible to only include newly created columns and omit the old ones in the resulting data frame. To do so, use the same syntax as mutate (), but instead call the transmute() function:

```
transmute(df, double = 2 * value, quadruple = 4 * value)

double quadruple
1     2     4
2     4     8
3     6     12
4     8     16
5     10     20
```

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- We often need to extract summary information about a column. For example, we might want to know the mean and the standard deviation of a feature.
- The function summarise() returns a new data frame whose columns are aggregated from a column in the original data frame. The first argument is the data frame; the second is the new column name and the aggregation expression that defines its creation:

```
summarise(df, total = sum(value))
  total
1   15
```

summarise() can also create more than one column at a time:

• We can perform computations within the summarise() function as well:

```
summarise(df, new_col=mean(value)/sd(value))
   new_col
1 1.897367
```

- Below are some of the aggregating functions that can be used in summarise():
 - Built-in aggregating functions which take a vector and return a scalar value: min(), max(), mean(), sum(), sd() and median().
 - n(): returns the number of observations.
 - n_distinct(x): returns the number of unique values in the column x.
 - first(x) or last(x): returns the first or last observations in the column x.
 - \rightarrow nth(x, n): returns the nth observation in column x.

- Examples:
 - n_distinct(): In our data frame df, there are two different colors.

nth(): The fourth element in the value column is 4:

```
summarise(df, nth(value, 4))
  nth(value, 4)
1     4
```

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Join Data Sets

- For better allocation of resources, related data is often stored in separate locations. Let's examine the baby datasets once again:
 - Recall that the births dataset contains the variables of year, sex, and births.
 - On the other hand, the bnames dataset contains the variables of year, name, prop, sex, and soundex.
- In an analysis, we might need the information from both data frames at once. We can combine these data frames with a join.
 - If you know SQL, you are familiar with the notion of joining two tables. As in SQL, dplyr has several kinds of joins: *inner join*, *outer join*, *left outer join*, and *right outer join*; dplyr also has *semi-join* and *anti-join*.

Joins

- The basic idea of a join: We have two data frames df1 and df2 with one or more columns in common; these columns contain the same type of data, and may even have the same name. Call these columns the join columns.
 - For births and bnames, the join columns are year and sex.
- Take any row from df1 and any row from df2. If they have the same values in the join column(s), then combine those two rows into one and put the result into a new data frame.
 - \triangleright Repeat this process for every pair of rows from df1 and df2.
- The different types of joins mostly differ on how they deal with the situation where a row in one data frame has *no* matching row in the other.

Joins

Let's see what happens with an *inner join*. We have a table that matches buildings with cities, and another that matches cities with countries. We want to match buildings with countries:

Building	City
Empire State	New York
Eiffel Tower	Paris
Notre Dame	Paris

City	Country
New York	USA
Paris	France

The join compares each pair of rows to find where the values in the City column match. The result is as follows:

Building	City	Country
Empire State	New York	USA
Eiffel Tower	Paris	France
Notre Dame	Paris	France



Join Data Sets

Let's construct a couple sample data sets to illustrate different joining methods:

```
x = data.frame( name = c("John", "Paul", "George",
                       "Ringo", "Stuart", "Pete"),
               instrument = c("guitar", "bass", "guitar",
                             "drums", "bass", "drums"),
               stringsAsFactors = FALSE)
X
   name instrument
           guitar
   John
 Paul
              bass
3 George guitar
  Ringo drums
5 Stuart
             bass
             drums
   Pete
```

Join Data Sets

Here's another data frame y:

```
y <- data.frame( name = c("John", "Paul", "George",
                          "Ringo", "Brian"),
                 band = c(TRUE, TRUE, TRUE,
                         TRUE, FALSE),
                 stringsAsFactors = FALSE)
У
         band
   name
   John TRUE
2 Paul TRUE
3 George TRUE
4 Ringo TRUE
5 Brian FALSE
```

Note that x and y both have a column called name.

Inner Join

The function inner_join() is the basic and original join. As described previously, it takes every pair of rows from the left and right data frames; if the values in the join column are the same, the combined row is kept in the resulting data frame:

Since the rows in x with names Stuart and Pete don't match any rows in y, they do not show up in the result.

Left Join

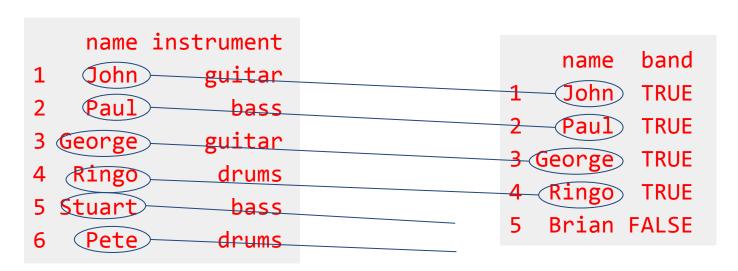
- The function left_join() differs from the inner join in that every row from the left data frame is included in the result, regardless of whether there is a match in the right data frame. How?
- If a row in the left data frame is not matched by any row in the right, it is still put into the result; however, the corresponding columns from the right data frame appear to have NAs instead of actual values:

```
left_join(x, y, by = "name")
   name instrument band
   John
            guitar TRUE
   Paul
              bass TRUE
            guitar TRUE
3 George
  Ringo
             drums TRUE
5 Stuart
              bass
                     NA
   Pete
             drums
                     NA
```



Left Join

Let's see how this works:



- Since Stuart and Pete don't match anything, they are included in the result with NA.
- Note that Brian isn't included in the final result. This is because we are performing a *left* join.

Right Join

The function right_join() works in much the same way. The only difference is that rows in the right data frame are all kept, regardless of matches in the left data frame. NA values are placed accordingly:

```
right_join(x, y, by = "name")
   name instrument band
1 John guitar TRUE
2 Paul bass TRUE
3 George guitar TRUE
4 Ringo drums TRUE
5 Brian <NA> FALSE
```

Full Join

The full join (aka outer join or full outer join) combines the processes of both the left and right joins into one process. Thus, all unmatched records are retained from both data frames. The function is called full_join():

```
full_join(x, y, by = "name")
   name instrument
                   band
   John
           guitar TRUE
   Paul
             bass TRUE
           guitar TRUE
3 George
  Ringo
           drums
                  TRUE
5 Stuart
             bass
                    NΑ
6
   Pete
            drums
                  NΑ
  Brian
          <NA> FALSE
```

Semi Join

The function semi_join() is most similar to an inner_join() in that it keeps only the rows showing up in both of the data frames. The difference is that it retains only the columns in the left data frame:

• We could have used filter() if we referenced the name columns from both data frames as follows:

```
filter(x, name %in% y$name)
```



Anti Join

The function anti_join() is similar to the semi_join() in that it keeps only the columns of the left data frame; however, it retains only the rows that do not have a match in the right data frame:

```
anti_join(x, y, by = "name")
    name instrument
1  Pete     drums
2  Stuart     bass
```

Join & Mutate Example Application

• We want to calculate the number of children with a particular name born in each year. First we create a data frame bnames 2. Notice that the by parameter specifies a vector; in this example, rows are identified if both year and sex are the same when we set the by parameter to a vector:

Next, we add a new column n to bnames 2 whose value is the desired number. The function round() makes sure we have an integer. (It doesn' t really make sense to have 1.5 babies.):

```
bnames2 = mutate(bnames2, n = round(prop * births))
```



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Groupwise Operations

- Analysis often reveals different insights when applied to different a subsets of data. For example, in the baby names dataset, the total number of "Vivians" differs from the total number of "Vivians" within each year.
- In the last application, we created a column representing the total number of children with a particular name born in each year. If we sum the "Vivians," we see that there were 183,011 total born from 1880 to 2008 (the whole dataset):

Groupwise Operations

This is likely to be different from the total number of "Vivians" in 2008 only:

- If we want to find the number in each year, must we type and run the same code for each year? What if we want to do the same for every name too? That will take us forever!
- Groupwise operations help in such a scenario by creating groups and aggregating values over each group.

Groupwise Operations

Recall our sample data frame df, which we will use to illustrate the groupwise operations:

```
df
color value
1 blue 1
2 black 2
3 blue 3
4 blue 4
5 black 5
```

group_by

- We see two different groups in the color column: blue and black. Let's use the group_by() function to create a "grouped data frame".
 - group_by() takes two or more arguments: (1) the data frame, and(2) the column(s) whose values will be used for grouping.
 - Its output has several types: in addition to "data.frame", it has types "tbl", "tbl_df" and "grouped_df". The important one here is "grouped_df," which contains the grouping information:

```
by_color = group_by(df, color)
class(by_color)
[1] "grouped_df" "tbl_df" "tbl" "data.frame"
```

group_by

When a "grouped_df" object is printed, R shows the source data frame and any grouping factors:

```
by_color = group_by(df, color)
by_color
Source: local data frame [5 x 2]
Groups: color
 color value
1 blue
2 black 2
3 blue 3
4 blue 4
5 black 5
```

We can aggregate the values of the "grouped_df" object within each group by applying the summarise() function and the aggregating functions we introduced before:

```
summarise(by_color, total = sum(value))

Source: local data frame [2 x 2]

color total
1 black    7
2 blue    8
```

group_by and summarise

Now we are ready to answer our earlier question: How many babies with a particular name were born in each year? Let's group the data by both name and year:

```
group by(bnames2, name, year)
Source: local data frame [258,000 x 7]
Groups: name, year
  year name prop sex soundex births
  1880
          John 0.081541 boy J500 118405 9655
2 1880 William 0.080511 boy W450 118405 9533
         James 0.050057 boy J520 118405 5927
  1880
  1880 Charles 0.045167 boy C642 118405 5348
  1880
       George 0.043292 boy G620 118405 5126
```

group_by and summarise

Summarising the grouped data frame, we compare "Vivian 1895" in the summary and in the original data frame. We see that multiple rows in the original data frame were aggregated (summed) in the summary:

group_by and summarise

Printing out the summary object, we see:

```
summary
Source: local data frame [244,078 x 3]
Groups: name
     name year total
 Aaden 2008 959
2 Aaliyah 1994 1449
3 Aaliyah 1995 1254
4 Aaliyah 1996 831
5 Aaliyah 1997 1738
6 Aaliyah 1998 1398
```

The %>% Operator

- The previous call was a bit complicated; the code is written "inside-out". We first called the group_by() function and then the summarise() function; however, when typing the code we need to type summarise() first and then group_by(). This can get confusing!
- dplyr provides a handy operator that allows us to type in an intuitive way. Note that the following three lines are equivalent:

```
group_by(bnames2, name, year)
bnames2 %>% group_by(., name, year)
bnames2 %>% group_by(name, year)
```

The %>% ("chaining") operator passes the object into a function's data frame argument, which is indicated by ".". The period can be omitted if the data frame is the first argument of the function.



The %>% Operator

• We can use the chaining operator to apply the dplyr functions in a more intuitive order:

```
bnames2 %>% group_by(name, year)
       %>% summarise(total=sum(n))
Source: local data frame [244,078 x 3]
Groups: name
     name year total
1
    Aaden 2008
                 959
2 Aaliyah 1994 1449
3 Aaliyah 1995 1254
4 Aaliyah 1996 831
  Aaliyah 1997 1738
```

Grouping Stepwise

Instead of grouping multiple columns at once, we may do so in severals steps. For example, we may group bnames by name and then by year as follows. This results in the same grouping as before:

```
bnames2 %>% group by(name) %>% group by(year)
Source: local data frame [258,000 x 7]
Groups: year
                prop sex soundex births
  year
         name
  1880
          John 0.081541 boy
                             J500 118405 9655
  1880 William 0.080511 boy W450 118405 9533
  1880 James 0.050057 boy J520 118405 5927
4 1880 Charles 0.045167 boy C642 118405 5348
```

Appendix

Appendix of Exercises & Solutions

Exercise 1: filter

- Find all of the names that are in the same soundex as your name (or your favorite name, in case you don't have a common English name).
- Select the rows of all girls born in 1900 or 2000.
- How many times did a name reach a proportion greater than 0.01 after the year 2000?

Solution 1: filter

vivian <- filter(bnames, name == "Vivian")
vivian\$soundex[1]
[1] V150 # Find the soundex of your name first
filter(bnames, soundex=="V150")</pre>

- filter(bnames, sex=="girl"&(year==1900|year==2000))
- nrow(filter(bnames, year > 2000 & prop > 0.01))

Exercise 2: select

- From bnames, select the columns whose names start with, 'y', 's' or 'p'.
 - Note: Because bnames is very large, be sure to assign the result of this (and subsequent) exercises to a variable. Then you can look at it using head or str.
- Create a data frame that is the same as bnames without the column "year".
- Select the columns "year" and "name" from bnames. Use only one condition to achieve this.

Solution 2: select

select(bnames, starts_with('y'), starts_with('s'),
starts_with('p'))

select(bnames, -starts_with('y')) # either can be used
select(bnames, -year) # in this case

select(bnames, contains('a'))



Exercise 3: arrange

- Reorder the dataset bnames by prop in descending order.
- In what year was your name the most popular?



Solution 3: arrange

arrange(bnames, desc(prop))



Exercise 4: mutate

For the data frame bnames, create a column "percentage", which derives from "prop" by changing the proportion to a percentage.



Solution 4: mutate

mutate(bnames, percentage=100*prop)



Exercise 5: summarise

Create a summary that displays the min, mean, and max prop for your name, from the data frame bnames.

Solution 5: summarise

summarise(filter(bnames, name=='Vivian'), min(prop),
mean(prop), max(prop))



Exercise 6: Join the Data Sets

- We want to calculate the number of children with a particular name born in each year.
 - Create a data frame bnames with the code below, replacing "your_join" by the join function you decide to use. Notice that the by parameter specifies a vector; how do you think it works?

```
bnames2 = your_join(bnames, births, by=c("year","sex"))
```

Add a new column to bnames 2 whose value is the desired number.
Name the column "n".

Solution 6: Join the Data Sets

- We give the solution here because we will need to use bnames 2.
 - Rows are identified if both year and sex are the same when we set the by parameter to a vector.

The function round() makes sure we have an integer. It doesn't really make sense to have 1.5 babies.

```
bnames2 = mutate(bnames2, n = round(prop * births))
```

Exercise 7: group_by and summarise

- We used a join function to construct bnames 2.
 - Recover the births data frame from bnames2 with group_by() and summarise(). Call it births2. Hint: Look at the births data frame; what information does it provide and how we can obtain this information from bnames2?
 - If the result you obtain is not exactly the same as the original births data frame, what do you think caused the difference?



Solution 7: group_by and summarise

- We used a join function to construct bnames2.

 - Because there is no data about 2009 in bnames, so the rows in 2009 from births are discarded by inner_join.

Exercise 8: %>% operator

Recall our sample data set, df

```
df
color value
1 blue 1
2 black 2
3 blue 3
4 blue 4
5 black 5
```

Reproduce the result of sum of values for each color. Use the %>% operator this time.



Solution 8: %>% operator

Recall our sample data set, df

```
df
color value
1 blue 1
2 black 2
3 blue 3
4 blue 4
5 black 5
```

```
Df %>% group_by(color) %>% summarise(total=sum(value))
```

