PS 312: Programming with R Course Notes

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Welcome

This course is an introduction to the statistical programming language R and various applications. We will cover the entire data analytics pipeline from data ingestion to data wrangling, summarizing, modeling, visualizing and reporting, all using tools found within the R ecosystem.

The version of these notes you are reading now was built on 2019-03-24.

Reproducibility

These notes are written with bookdown, a R package for writing books using rmarkdown. All code in these notes were developed on R version 3.5.0 (2018-04-23), using the same packages pre-installed in your virtual machines. When you're on your own, you will need to install a recent version of R, and also install the corresponding packages, on your computer, for all the code to work. A listing of all the packages used in this course will be available as an appendix.

To build these notes locally, clone or download the Github repo hosting these notes, unzip it if necessary, and double-click on FSI_Book.Rproj. Assuming you have RStudio installed, this will open this project (more on *RStudio Projects* later). You can then go to the console and enter the following code:

```
bookdown::render_book("index.Rmd") # to build these notes
browseURL("_book/index.html") # to view it
```

Starting up

Chapter 1

What is R?

R is the most popular open source statistical programming language in the world. It allows you to

- 1. read datasets written in a wide variety of formats,
- 2. clean and process the data,
- 3. derive summaries,
- 4. run analytics,
- 5. visualize
- 6. create automated reports, presentations, websites, dashboards and interactive applications

R is not just a language, but an ecosystem comprising over 15,000 user- and corporation-developed *packages* or modules, all written in the R language for a variety of purposes. It is a very flexible and customizable language, which is why it is used by an estimated 2 million users worldwide for data analytics. The question R users often ask is not "Can it be done?" but rather "How can it be done?". R is used in areas as varied as healthcare, economics, forestry, oceanography, pharmaceuticals, artificial intelligence and natural language processing.

Why is R so widely used? Some reasons are:

- R is open source, so it is accessible to anyone with a computer
- Since the code in R and all its packages are open, the community of users can help debug it and make it more reliable and robust
- The R ecosystem is very rich in tools for doing data analytics in particular, so there is almost certainly something available for almost any task
- The community of R users worldwide is a very strong, well-connected group who are welcoming, ready to help, cooperative and inclusive. Many users find this community to be one of the most attractive things about R
- R produces really nice customizable visualizations with relatively little effort, which was one of the first reasons for popularity.

¹https://spectrum.ieee.org/static/interactive-the-top-programming-languages-2018

A note on coding and programming

R does not have a *point-and-click* interface that you are probably more familiar with from Excel, Word or other computer applications. It requires you to *code*, i.e. write instructions for the computer to, in the case of R, read, analyze, graph and report on datasets.

R is first and foremost a **language**. So, instead of thinking that this is some geeky thing that "programmers" and "IT people" do, think of it as learning a language. You will see that, like any language, it has nouns, verbs, adjectives and adverbs, and you can create "sentences" that start with data and end in something useful like a table, graph or document. With a traditional spoken and written language like French, Arabic, Farsi or Japanese, you learn it to be able to interact with people at different posts around the world. With a programming language like R, you will be able to interact with **data**, to make sense of it, to describe it, and to present it.

Coding

Coding is writing explicit instructions to a very literal, and in some ways, stupid machine. The machine takes our code literally, and will do **exactly** what you tell it to do in the code. If you are getting unexpected results, it's almost certainly your code that needs to be checked, not the machine.

R, the language

As we will see, R has many elements of a language.

- **Objects**: These are the *nouns*. We will act on objects to create new objects. Each object has a *name* which we will treat as the nouns in our code.
- Functions: These are the *verbs*. Functions will act on objects to create new objects.
- The %>% operator: This acts like the conjunction "then" to create "sentences" called *pipes* or *chains*.
- Optional function arguments: These are adverbs which modify the action of the function (verb).

While writing code in R, we should be aware that R is **case-sensitive**, so mydata is a different object than myData which is also different from Mydata and MyData and MyData and my_data, and mean, which is a function in R, is different from Mean which is not defined in R.

You have to name all the objects you create in R if you want to see them again. Try and pick a naming system that is simple yet descriptive, rather than data1. Two typical conventions that are used are CamelCase and pothole_case. So you could name a dataset of operational budgets for January, 2019 as operations_budget_2019_jan or OperationsBudget2019Jan or really anything you want, as long as it's clear to you and doesn't include some forbidden characters like -, @,\$ which are reserved for other purposes, or doesn't start with a number.

Some people have a system where data objects (which are called data.frame or tibble or vector or matrix) should be capitalized, while function names should not. Data objects should probably be nouns and functions verbs, since that reminds us of their functions. There are different opinions. Some influential ones are here and here. As they say, finding a good name is hard, but often worth the effort.

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The ultimate goal for every script file is to create a "story" using the language of R, starting from data to create descriptions, understand patterns through visualization and modeling, and analyzing the data in general. Scripts make this story reproducible, and also transferable to different data sets.

Of course, as with any beginner writer, your coding will be sloppy at first, will suffer many stops and starts and strike-throughs and modifications and throwing things into the proverbial trash. With practice, this will become easier and smoother and more effective and more expressive. This workshop is designed to give you an initial push towards that goal.

So, let's start this journey.

1.1 A short introduction to R objects

1.1.1 Objects

The broad categorization of R objects in my mind are functions (verbs) and data objects (nouns). Data objects are in turn of different types:

- data.frame or tibble: These are rectangular data sets much like you would see in a spreadsheet
- vector: This is a 1-dimensional list of numbers or strings (words in the language sense), but all must be of the same kind (number or string)
- matrix: This is a 2-dimensional list of numbers or strings, once again all of the same type
- A single number or word
- list: This is a catch-all bucket. Each element of a list can be literally any valid R object. So they could be tibble's, or functions, or matrices, and different elements can be of different types.

Most objects we'll use in this workshop are going to be data.frame or tibble objects. (In case you're wondering, they're basically the same thing, but tibble's have some modest additional functionality). R comes with a bunch of built-in datasets stored as data.frames.

mtcars

##		mpg	cyl	disp	hp	drat	wt	qsec	٧S	am	gear	carb
##	Mazda RX4	21.0	6	160.0	110	3.90	2.620	16.46	0	1	4	4
##	Mazda RX4 Wag	21.0	6	160.0	110	3.90	2.875	17.02	0	1	4	4
##	Datsun 710	22.8	4	108.0	93	3.85	2.320	18.61	1	1	4	1
##	Hornet 4 Drive	21.4	6	258.0	110	3.08	3.215	19.44	1	0	3	1
##	Hornet Sportabout	18.7	8	360.0	175	3.15	3.440	17.02	0	0	3	2
##	Valiant	18.1	6	225.0	105	2.76	3.460	20.22	1	0	3	1
##	Duster 360	14.3	8	360.0	245	3.21	3.570	15.84	0	0	3	4
##	Merc 240D	24.4	4	146.7	62	3.69	3.190	20.00	1	0	4	2
##	Merc 230	22.8	4	140.8	95	3.92	3.150	22.90	1	0	4	2
##	Merc 280	19.2	6	167.6	123	3.92	3.440	18.30	1	0	4	4
##	Merc 280C	17.8	6	167.6	123	3.92	3.440	18.90	1	0	4	4
##	Merc 450SE	16.4	8	275.8	180	3.07	4.070	17.40	0	0	3	3
##	Merc 450SL	17.3	8	275.8	180	3.07	3.730	17.60	0	0	3	3
##	Merc 450SLC	15.2	8	275.8	180	3.07	3.780	18.00	0	0	3	3
##	Cadillac Fleetwood	10.4	8	472.0	205	2.93	5.250	17.98	0	0	3	4

```
## Lincoln Continental 10.4
                                8 460.0 215 3.00 5.424 17.82
                                                                0
                                                                   0
                                                                         3
                                                                              4
## Chrysler Imperial
                                8 440.0 230 3.23 5.345 17.42
                                                                   0
                                                                         3
                        14.7
                                                                0
                                                                              4
## Fiat 128
                                         66 4.08 2.200 19.47
                                                                         4
                        32.4
                                4
                                  78.7
                                                                1
                                                                   1
                                                                              1
## Honda Civic
                        30.4
                                   75.7
                                         52 4.93 1.615 18.52
                                                                         4
                                                                              2
                                                                1
                                                                   1
## Toyota Corolla
                        33.9
                                4 71.1
                                         65 4.22 1.835 19.90
                                                                   1
                                                                              1
                                                                1
                                                                         4
## Toyota Corona
                        21.5
                                4 120.1
                                         97 3.70 2.465 20.01
                                                                1
                                                                   0
                                                                         3
                                                                              1
## Dodge Challenger
                                8 318.0 150 2.76 3.520 16.87
                                                                         3
                                                                              2
                        15.5
                                                                0
                                                                   0
## AMC Javelin
                        15.2
                                8 304.0 150 3.15 3.435 17.30
                                                                   0
                                                                         3
                                                                              2
## Camaro 728
                                8 350.0 245 3.73 3.840 15.41
                                                                         3
                                                                              4
                        13.3
                                                                   0
                                                                0
## Pontiac Firebird
                        19.2
                                8 400.0 175 3.08 3.845 17.05
                                                                   0
                                                                         3
                                                                              2
## Fiat X1-9
                        27.3
                                        66 4.08 1.935 18.90
                                                                         4
                                  79.0
                                                                1
                                                                   1
                                                                              1
## Porsche 914-2
                                4 120.3
                                         91 4.43 2.140 16.70
                                                                              2
                        26.0
                                                                   1
                                                                         5
## Lotus Europa
                        30.4
                                4 95.1 113 3.77 1.513 16.90
                                                                1
                                                                   1
                                                                         5
                                                                              2
## Ford Pantera L
                        15.8
                                8 351.0 264 4.22 3.170 14.50
                                                                   1
                                                                         5
                                                                              4
## Ferrari Dino
                                6 145.0 175 3.62 2.770 15.50
                                                                         5
                        19.7
                                                                   1
                                                                              6
## Maserati Bora
                        15.0
                                8 301.0 335 3.54 3.570 14.60
                                                                   1
                                                                         5
                                                                              8
                                                                0
## Volvo 142E
                                4 121.0 109 4.11 2.780 18.60
                                                                   1
                                                                         4
                                                                              2
                        21.4
                                                                1
```

A data. frame can be acted upon by different functions to help describe it and extract elements from it. For example, to see the size of the data, we use

dim(mtcars)

[1] 32 11

Data sets often have row names and column names. These can be extracted by the functions rownames and columns or names:

rownames(mtcars)

[11] "carb"

```
[1] "Mazda RX4"
                               "Mazda RX4 Wag"
                                                       "Datsun 710"
##
                                                      "Valiant"
##
    [4] "Hornet 4 Drive"
                               "Hornet Sportabout"
##
    [7] "Duster 360"
                               "Merc 240D"
                                                       "Merc 230"
  [10] "Merc 280"
                               "Merc 280C"
                                                      "Merc 450SE"
##
## [13] "Merc 450SL"
                               "Merc 450SLC"
                                                       "Cadillac Fleetwood"
  [16] "Lincoln Continental" "Chrysler Imperial"
                                                      "Fiat 128"
## [19] "Honda Civic"
                               "Toyota Corolla"
                                                       "Toyota Corona"
## [22] "Dodge Challenger"
                               "AMC Javelin"
                                                       "Camaro Z28"
## [25] "Pontiac Firebird"
                               "Fiat X1-9"
                                                      "Porsche 914-2"
## [28] "Lotus Europa"
                               "Ford Pantera L"
                                                      "Ferrari Dino"
## [31] "Maserati Bora"
                               "Volvo 142E"
names(mtcars)
               "cyl"
                                                                   "am"
    [1] "mpg"
                       "disp" "hp"
                                     "drat" "wt"
                                                    "qsec" "vs"
                                                                           "gear"
##
```

Both of these are valid R objects that are vectors of strings. You could save them for future use by *assigning* them a name using the assignment operator <-. So if you wanted to store the row names, which are the makes and models of the cars in this data set (this structure is not desirable, as we'll discuss later), you could run

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```
car_names <- rownames(mtcars)</pre>
```

You can see that this is stored in R for current use, either by typing ls() in the console (for "list") or by looking in the Environment pane in RStudio.

The output of any function is a valid R object, and so you can always store the results of the function by assigning it a name, as above.

1.1.2 Extracting elements from objects

We can see the structure of any object by using the function str.

```
str(mtcars)
```

```
'data.frame':
                    32 obs. of 11 variables:
                 21 21 22.8 21.4 18.7 18.1 14.3 24.4 22.8 19.2 ...
##
    $ mpg : num
    $ cyl : num
                 6 6 4 6 8 6 8 4 4 6 ...
##
##
   $ disp: num
                 160 160 108 258 360 ...
                 110 110 93 110 175 105 245 62 95 123 ...
##
   $ hp : num
                 3.9 3.9 3.85 3.08 3.15 2.76 3.21 3.69 3.92 3.92 ...
##
   $ drat: num
    $ wt : num
                 2.62 2.88 2.32 3.21 3.44 ...
##
                 16.5 17 18.6 19.4 17 ...
##
    $ qsec: num
   $ vs
##
                 0 0 1 1 0 1 0 1 1 1 ...
          : num
    $ am
                 1 1 1 0 0 0 0 0 0 0 ...
##
         : num
##
    $ gear: num
                 4 4 4 3 3 3 3 4 4 4 ...
    $ carb: num
                 4 4 1 1 2 1 4 2 2 4 ...
```

This tells us that mtcars is a data.frame with 32 observations (rows) and 11 variables (columns). Each variable has a name, and all the variables are numeric.

data.frame objects are like lists, in that each column can be of a different type. This is a very powerful structure, since we can keep all sorts of data together, and can load spreadsheets with diverse kinds of data easily into R

To extract the mpg variable from this data set, there are a few equivalent methods. My preferred method is mtcars[,'mpg'], i.e., extract the *column* named "mpg" from this data set. Notice that we're using [] while functions use (). This format of extraction will work when you're extracting more than one variable, as we'll see below. Other ways include mtcars[['mpg']] and mtcars\$mpg, which are the list way and a data.frame-specific shortcut.

You can also extract elements by position, either using the [,] or [[]] forms. So, to extract an element in the 2nd row and 4th column, you'd have to use the matrix notation as mtcars[2,4]. To extract the 4th column, you could use either mtcars[,4] or mtcars[[4]]. To extract the 2nd row, you'd again use the matrix notation as mtcars[2,].

If we want to extract the mpg, cyl and disp variables at once to create a new data.frame, you can use either the matrix notation mtcars[,c('mpg','cyl','disp')] or the list notation mtcars[[c('mpg','cyl','disp')]]. The c() function stands for *concatenate* and is the function used to **create** vectors. We'll actually see a much more user-friendly way of doing this in the data munging section (Chapter 4).

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Advanced note: A data. frame object is really a list object where all the elements are vectors of the same length, and which happen to have names assigned to them. The object also looks like a matrix or 2-dimensional array visually. So both notations were allowed to be valid for data. frame objects.

1.2 R Packages

Packages are modules of R code that enhance the capabilities of R. Many packages are well established and curated, and have to go through a strict software compatibility review before allowed on CRAN.

Installing packages

Installing packages on your computer can be done from the RStudio menu (Tools > Install Packages), or by running the command install.packages(<package name>, repos = "https://cran.rstudio.com"). For example, to install the readxl package, which we will use shortly, we would run the code

```
install.packages("readxl", repos="https://cran.rstudio.com")
```

You can set the default repository in RStudio, in Tools > Global Options.

Be aware that everything here is case-sensitive

Another way to install packages is to go to the Packages pane in RStudio, use the search bar there to find the package you want to install, and then click the checkbox beside the name. This is convenient, but not very reproducible if you have to move to a different computer, so it's generally discouraged.

How do you find packages? Glad you asked. The easiest way to find packages on CRAN is actually through the RStudio Packages pane, where the entire set of available packages are listed with a brief, top-line description. You can click on the package name to see a much more detailed overview of the packages, and many packages do have vignettes which give more information. However, once you've found the package you want, you should really code it up with install.packages, so that you can save the script for later when you might need to remember it again.

1.2.1 Loading packages in R

We will use several packages to enhance our experience and get going faster. However, to use a package, you must first load it into R. To load a package into R, you use the function library (ironically).

The first package we will load is the tidyverse package. This is actually a meta-package, which in turn loads a bunch of other packages. These form a core group of useful packages that are widely used, including

- readr (reading data from text files)
- tidyr (Manipulation, pivoting)
- dplyr (summarize, aggregate, filter)
- ggplot2 (visualization)
- purrr (functions applied across data structures, meta-programming)

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- stringr (string manipulation)
- forcats (categorical data)

In addition, we'll load the readxl package for reading Excel files.

```
library(tidyverse)
library(readxl)
```

1.3 R Resources

There are many high quality resources for learning R available online. This is a selection of what I find most useful.

- 1. CRAN Task Views: These are curated lists of R packages for various purposes, ranging from econometrics to mathematics, finance, imaging, social sciences, time series, spatial analyses and more.
- 2. RStudio Cheatsheets: These are high-quality cheatsheets about different aspects of the R analytic pipeline.
- 3. StackOverflow #r: The r tag on StackOverflow is the place to find answers about R
- 4. Twitter #rstats: The who's who of R hang out at the #rstats hashtag, and questions can get answered very quickly. Also a way to find out what new packages are coming up
- 5. R-Bloggers: A blog aggregator which collects a few hundred R-related blogs in one place (including mine, in the interests of disclosure)
- 6. RSeek: When one realizes that R is just a letter in the alphabet, Google searches can be a bit difficult. RSeek has created a custom search targeted at R-related topics, sites and packages on the web.

Chapter 2

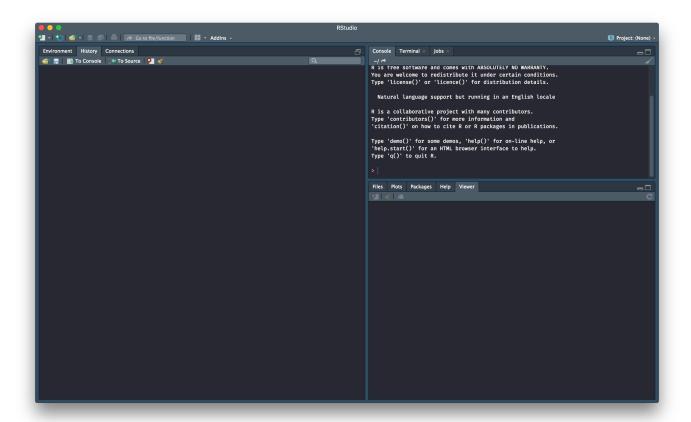
RStudio, your development environment (authoring program)

While R is the language we will learn, RStudio is the interface (or *integrated development environment*) we will use to write it, interact with it, and see our results. RStudio provides by far the most user-friendly interface to R (though it's not point-and-click).

This is the "journal" or "notebook" in which you will start your writing journey in R

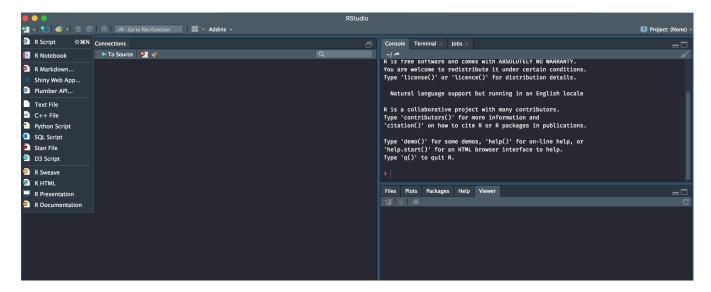
Starting RStudio

When you open RStudio, either from your desktop or from the Start menu, you'll see something like this:

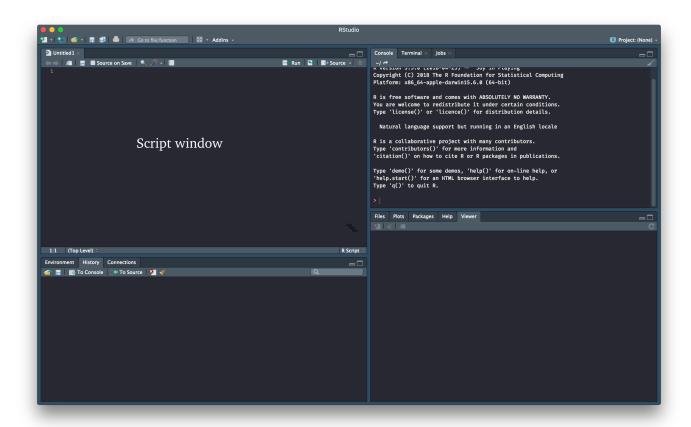


I'll note that I've done some customization to my console, which you can also do by going to Tools > Global Options. Your screen will most likely have a white rather than a dark background

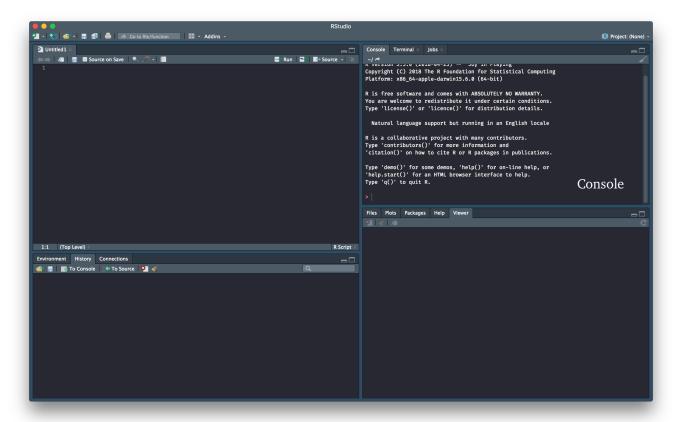
You can open a new panel for an R script using either File > New File > R Script or using the button at the top left of the window:



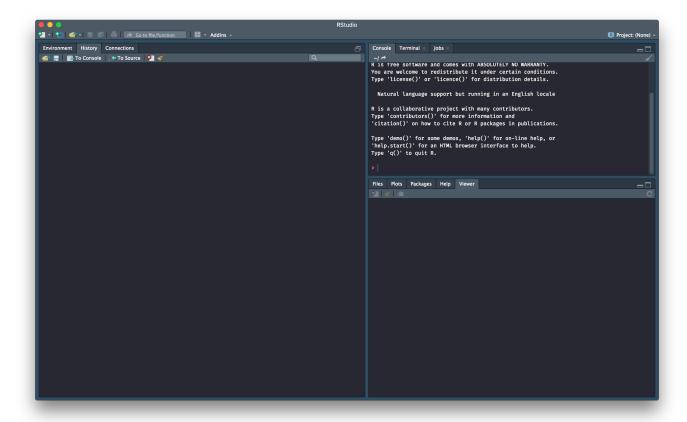
This opens up an R script file that you can edit and save. You will mainly be writing in this panel within a R script (see 2.1 for more details).



You will also have a Console panel where the code will actually run in R.



Other panes



There are several other panes in RStudio that we will see in due course.

- Environment: This shows all the objects ("words") in your current environment
- **History**: This gives a history of the commands you have run. This is searchable. Though you do have a stored history, see 2.1 for why you shouldn't fall to temptation to just code in the console.
- Files: This is exactly like File Explorer in Windows, and lets you see the contents of a folder/directory
- Plot: These is where the plots will show up. See ?? for more details on how to create plots
- **Packages**: This gives a listing of installed packages. You *can* click on the tick boxes to load packages into your environment, but I prefer coding it in (see section ??) to make it reproducible and verifiable.
- Help: This will show help files once they are evoked
- **Viewer**: This pane shows results when they are produced as HTML documents. This pane will also come into play once we start with interactive visualizations in section ??.

Feel free to explore these different panes and understand their functionalities.

2.1 Rstudio workflow

As we've seen, RStudio has both a scripting pane to write code, and a console pane to run code. Of course, you can write code directly into the console, but it is **not** a good practice. You will tend to get sloppy, lose the "story", and generally have less reproducible code.

Writing the program ("story") is just more reliable if you write into the script file and the send it to the console

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to run. Sending it to the console can be acheieved with a keyboard shortcut, Ctrl-Enter (or Cmd-Enter on a Mac). This is something that will be second nature while coding in RStudio.

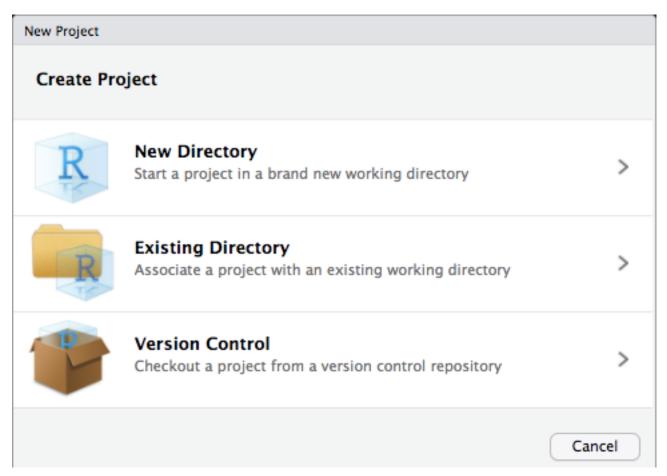
When you write code, be sure to comment your code liberally. In R, any line or any phrase starting with # is considered a comment and is ignored by the program. This allows you to comment your code, explain your ideas to yourself and generally make your code more readable. To further this goal, write your code in differnt lines, and indent, to make it more readable; R ignores white space in your file.

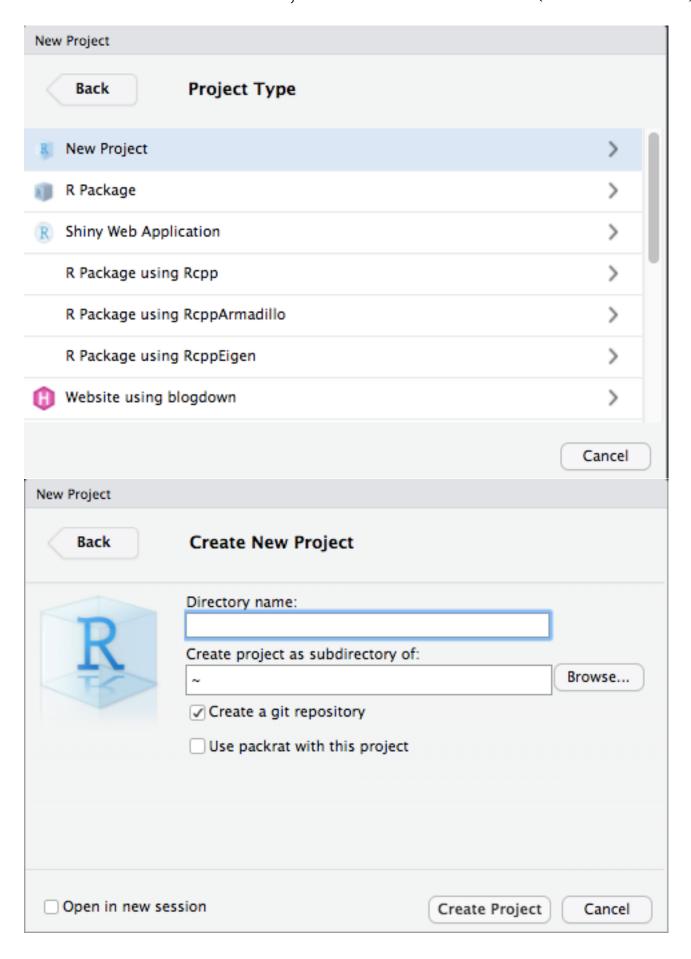
Why bother doing this? Basically because the most likely next person to see your code is going to be you in 6 months, and you don't want to be scratching your head wondering what you were doing earlier (been there, done that, don't like it). You certainly can't phone your earlier self, so the best strategy is to write comments for your future self to minimize future grief.

2.2 RStudio Projects

Projects are a nice way to organize your data projects within RStudio. Projects keep together input data, R scripts, analytical results, and figures, and keeps different projects separate. Each project can run on its own independent R session (no worries about cross-hybridization), and you can have several projects open concurrently without risk of cross-pollinating them.

To make a new project, click File > New Project, then:





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Note that I always create a git repository for version control. If you're not doing that, untick the box in the window above.

Chapter 3

Loading data into R

R can access data files from a wide variety of sources. These include

- 1. Text files (csv, tsv, fixed-width)
- 2. Microsoft Excel files
- 3. Microsoft Access databases
- 4. SQL-based databases (MySql, Postgresql, SQLite, Amazon Redshift)
- 5. Enterprise databases (SAP, Oracle)

The R package rio can help read and write to many file types that are single files, and the package rodbc can do the same for the databases.

Exercise: Install the R package rio into your R installation

```
install.packages("rio", repos = "https://cran.rstudio.com") # Note the quotes
```

The rio package has a common way of reading data (using the import function). Importing the data will create an object called a data.frame, but if you just import data, it is not saved since it doesn't yet have a name.

```
library(rio) # activate the package
import('data/HR_Data.csv') # can use single or double quotes
```

So every time you import data, you have to name it. You do this using the <- operator.

```
hr_data <- import('data/HR_Data.csv')</pre>
```

Now, if you type hr data in the console, you will see the data you imported.

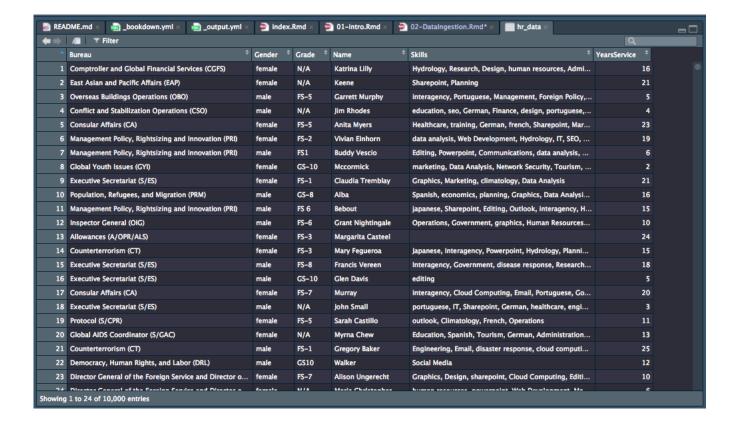
```
head(hr_data) # This just displays the first 10 lines of the data
```

```
##
                                                    Bureau Gender Grade
        Comptroller and Global Financial Services (CGFS) female
                                                                    N/A
## 1
                    East Asian and Pacific Affairs (EAP) female
## 2
                                                                    N/A
                     Overseas Buildings Operations (OBO)
                                                                   FS-5
## 3
                                                             male
             Conflict and Stabilization Operations (CSO)
## 4
                                                             male
                                                                    N/A
## 5
                                    Consular Affairs (CA) female
                                                                   FS-5
## 6 Management Policy, Rightsizing and Innovation (PRI) female
                                                                   FS-2
```

```
##
               Name
## 1
      Katrina Lilly
## 2
              Keene
## 3 Garrett Murphy
## 4
         Jim Rhodes
## 5
        Anita Myers
## 6 Vivian Einhorn
##
## 1
                                         Hydrology, Research, Design, human resources, Ac
## 2
                                                                                   Sharepot
                     interagency, Portuguese, Management, Foreign Policy, Economics, Hum
## 3
                        education, seo, German, Finance, design, portuguese, disease res
## 4
## 5 Healthcare, training, German, french, Sharepoint, Marketing, Data Analysis, Econom
                      data analysis, Web Development, Hydrology, IT, SEO, Disease Respor
##
     YearsService
##
## 1
               16
               21
## 2
                5
## 3
## 4
                4
## 5
               23
## 6
               19
```

Seeing the data like this is certainly a bit awkward, especially for large datasets. In RStudio, you can see the data somewhat like a spreadsheet with the following command:

```
View(hr_data)
```



3.1 Finer control of CSV imports

We can provide finer control over importing text files using additional options ("adverbs") to the import function ("verb"). For example, it might be good to check if all the column names are unique, and to make them not have spaces (which are awkward in terms of typing and functionality). You can add the option check.names = TRUE to the command:

```
hr_data <- import('data/HR_Data.csv', check.names = TRUE)</pre>
```

Similarly, if you're using European data, where the decimal point is denoted by a comma, you can add the following option:

```
hr_data <- import('data/HR_Data.csv', check.names = TRUE, dec = ',')</pre>
```

You can see most of the options in the help file for import, which you can access either from the Help pane, or by typing ?import or help(import) in the console

3.2 Finer control of Excel imports

You can specify sheet names or sheet positions for import from an Excel file. If you know the sheet name, you can specify it using the which option:

```
dos_data <- import('data/simulatedDOS.xlsx', which='Staffing_by_Bureau')</pre>
```

You can also grab the same sheet by position:

```
dos_data <- import('data/simulatedDOS.xlsx', which = 2)</pre>
```

We'll talk about how to grab multiple sheets together into a list in the data munging section4.

3.3 Importing data from databases

If you have data in an Access database, you can read it in pretty easily using the RODBC package. To import one particular table from Access, you can use

```
library(RODBC) # activate package, case-sensitive
channel <- odbcConnectAccess('C:/Documents/Name_of_Access_Database') # change to your
mydata <- sqlQuery(channel, paste("select * from Name_of_table_in_database"))</pre>
```

For other databases, the connection can be made using the odbc package. You can connnect to a MySQL database, for example, using

and you can load a table into R using

```
dat <- dbGetQuery(con, 'select * from <table name>')
```

You'll notice that it is a bit more complicated to call data from databases, though once it's set up, it works beautifully. For more details about this process for different databases, see RStudio's tutorial.

Chapter 4

Data Munging

Data munging refers to the work of transforming data to make it usable for a computer. Data unfortunately comes in all shapes and sizes, with all sorts of issues, so this process can take a while. Often a rule of thumb is that making a data set ready for analysis takes about 80% of the time of a project.

4.1 Tidy data

There is a principle of making data "tidy", promoted by Dr. Hadley Wickham. This tidying of data makes computer programs happy, since these data can be most easily digested. A dataset can be messy or tidy depending on how the rows, columns and tables you're using align with observations, variables and types.

The properties of a tidy dataset are:

- 1. Each variable forms a column
- 2. Each observation forms a row
- 3. Each type of observational unit forms a table.

This forms a standardized way to structure a dataset, and so makes it easy for the analyst to develop standard pipelines.

A dataset can be messy in many many ways. Many of the more common issues are listed below:

- Column names contain values, not just variable names
- Multiple variables are stored in one column
- Variables are stored in both rows and columns
- Multiple types of observational types are stored in the same table
- A single observational unit is stored in multiple tables

Sometimes the messier format is better for data entry, but bad for data analyses.

We'll show a few examples here, but a more detailed discussion is available online.

The workhorse for this tidying activity is the tidyr package, part of the tidyverse meta-package. We'll tend to start every analysis by loading the tidyverse package, so we are covered.

4.1.1 Variable in column names

```
library(tidyverse)
## -- Attaching packages
## v ggplot2 3.1.0
                              v purrr
                                        0.3.2
## v tibble
             2.0.1
                              v dplyr
                                        0.8.0.9009
## v tidyr
             0.8.3
                              v stringr 1.4.0
## v readr
              1.3.1
                              v forcats 0.4.0
## Warning: package 'tibble' was built under R version 3.5.2
## Warning: package 'tidyr' was built under R version 3.5.2
## Warning: package 'stringr' was built under R version 3.5.2
## -- Conflicts -----
## x dplyr::filter() masks stats::filter()
## x dplyr::lag()
                      masks stats::lag()
pew <- import('data/pew.csv')</pre>
head (pew)
                religion <$10k $10-20k $20-30k $30-40k $40-50k $50-75k
##
                Agnostic
                             27
                                     34
                                              60
                                                      81
                                                               76
## 1
                                                                       137
## 2
                 Atheist
                             12
                                     27
                                              37
                                                      52
                                                               35
                                                                        70
##
  3
                Buddhist
                             27
                                     21
                                              30
                                                      34
                                                               33
                                                                        58
                Catholic
##
  4
                           418
                                    617
                                             732
                                                     670
                                                              638
                                                                      1116
  5 Don't know/refused
##
                             15
                                     14
                                              15
                                                      11
                                                                        35
                                                               10
       Evangelical Prot
                           575
                                    869
                                            1064
                                                     982
                                                              881
                                                                      1486
##
   6
##
     $75-100k $100-150k >150k Don't know/refused
## 1
          122
                     109
                             84
                                                 96
##
  2
           73
                      59
                             74
                                                 76
## 3
           62
                      39
                             53
                                                 54
          949
## 4
                     792
                            633
                                               1489
## 5
           21
                      17
                             18
                                                116
## 6
          949
                     723
                            414
                                               1529
```

This dataset has actual data in the column headers, rather than variable names. This information needs to be captured into a column. We should ideally have 3 columns in this dataset: religion, income and frequency. We can achieve this using a function called gather which takes a wide dataset and makes it tall. We will do this by forming a pipeline (think of this as a sentence), starting with the dataset.

```
pew %>%
  gather(income, frequency, -religion)
##
                        religion
                                               income frequency
                        Agnostic
## 1
                                                <$10k
                                                              27
## 2
                         Atheist
                                                <$10k
                                                              12
## 3
                        Buddhist
                                                <$10k
                                                              27
```

##	4	Catholic	<\$10k	418
##	5	Don't know/refused	<\$10k	15
##	6	Evangelical Prot	<\$10k	575
##	7	Hindu	<\$10k	1
##	8	Historically Black Prot	<\$10k	228
##	9	Jehovah's Witness	<\$10k	20
##	10	Jewish	<\$10k	19
##	11	Mainline Prot	<\$10k	289
##	12	Mormon	<\$10k	29
##	13	Muslim	<\$10k	6
##	14	Orthodox	<\$10k	13
##	15	Other Christian	<\$10k	9
##	16	Other Faiths	<\$10k	20
##	17	Other World Religions	<\$10k	5
##	18	Unaffiliated	<\$10k	217
##	19	Agnostic	\$10-20k	34
##	20	Atheist	\$10-20k	27
##	21	Buddhist	\$10-20k	21
##	22	Catholic	\$10-20k	617
##	23	Don't know/refused	\$10-20k	14
##	24	Evangelical Prot	\$10-20k	869
##	25	Hindu	\$10-20k	9
##	26	Historically Black Prot	\$10-20k	244
##	27	Jehovah's Witness	\$10-20k	27
##	28	Jewish	\$10-20k	19
##	29	Mainline Prot	\$10-20k	495
##	30	Mormon	\$10-20k	40
##	31	Muslim	\$10-20k	7
##	32	Orthodox	\$10-20k	17
##	33	Other Christian	\$10-20k	7
##	34	Other Faiths	\$10-20k	33
	35	Other World Religions	\$10-20k	2
##	36	Unaffiliated	\$10-20k	299
##	37	Agnostic	\$20-30k	60
##	38	Atheist	\$20-30k	37
	39	Buddhist	\$20-30k	30
	40	Catholic	\$20-30k	732
	41	Don't know/refused	\$20-30k \$20-30k	15
	42 43	Evangelical Prot Hindu	\$20-30k \$20-30k	1064 7
	43 44	Historically Black Prot	\$20-30k \$20-30k	236
	44	Jehovah's Witness	\$20-30k \$20-30k	236
	46	Jewish	\$20-30k	25
	47	Mainline Prot	\$20-30k \$20-30k	619
	48	Mormon	\$20-30k \$20-30k	48
	49	Muslim	\$20-30k \$20-30k	9
	50	Orthodox	\$20-30k	23
	50	01 C11040X	720 30K	25

ии	- 1		620, 201.	1.1
## ##	51	Other Christian Other Faiths	\$20-30k \$20-30k	11 40
##	53	Other World Religions	\$20-30k \$20-30k	3
##	54	Unaffiliated	\$20-30k \$20-30k	3 374
##	55	Agnostic	\$30-40k	81
##	56	Atheist	\$30-40k	52
	57	Buddhist	\$30-40k	34
	58	Catholic	\$30-40k	670
##	59	Don't know/refused	\$30-40k	11
##	60	Evangelical Prot	\$30-40k	982
##	61	Hindu	\$30-40k	9
##	62	Historically Black Prot	\$30-40k	238
##	63	Jehovah's Witness	\$30-40k	24
##	64	Jewish	\$30-40k	25
##	65	Mainline Prot	\$30-40k	655
##	66	Mormon	\$30-40k	51
##	67	Muslim	\$30-40k	10
##	68	Orthodox	\$30-40k	32
##	69	Other Christian	\$30-40k	13
##	70	Other Faiths	\$30-40k	46
##	71	Other World Religions	\$30-40k	4
##	72	Unaffiliated	\$30-40k	365
##	73	Agnostic	\$40-50k	76
##	74	Atheist	\$40-50k	35
##	75	Buddhist	\$40-50k	33
##	76	Catholic	\$40-50k	638
##	77	Don't know/refused	\$40-50k	10
##	78	Evangelical Prot	\$40-50k	881
##	79	Hindu	\$40-50k	11
	80 81	Historically Black Prot Jehovah's Witness	\$40-50k \$40-50k	197 21
	82	Jenovan's withess Jewish	\$40-50k \$40-50k	30
##	83	Mainline Prot	\$40-50k	651
	84	Mormon	\$40-50k	56
	85	Muslim	\$40-50k	9
	86	Orthodox	\$40-50k	32
	87	Other Christian	\$40-50k	13
	88	Other Faiths	\$40-50k	49
##	89	Other World Religions	\$40-50k	2
##	90	Unaffiliated	\$40-50k	341
##	91	Agnostic	\$50-75k	137
##	92	Atheist	\$50-75k	70
##	93	Buddhist	\$50-75k	58
##	94	Catholic	\$50-75k	1116
##	95	Don't know/refused	\$50-75k	35
##	96	Evangelical Prot	\$50-75k	1486
##	97	Hindu	\$50-75k	34

шш	0.0	Historia all V. Dlask Dust	¢50 751	222
	98	Historically Black Prot	\$50-75k	223
##	99	Jehovah's Witness	\$50-75k	30
##	100	Jewish	\$50-75k	95
##	101	Mainline Prot	\$50-75k	1107
##	102	Mormon	\$50-75k	112
##	103	Muslim	\$50-75k	23
				47
##	104	Orthodox	\$50-75k	
##	105	Other Christian	\$50-75k	14
##	106	Other Faiths	\$50-75k	63
##	107	Other World Religions	\$50-75k	7
##	108	Unaffiliated	\$50-75k	528
##	109	Agnostic	\$75-100k	122
##	110	Atheist	\$75-100k	73
##	111	Buddhist	\$75-100k	62
##	112	Catholic	\$75-100k	949
##	113	Don't know/refused	\$75-100k	21
##	114	Evangelical Prot	\$75-100k	949
##	115	Hindu	\$75-100k	47
##	116	Historically Black Prot	\$75-100k	131
##	117	Jehovah's Witness	\$75-100k	15
##	118	Jewish	\$75-100k	69
##	119	Mainline Prot	\$75-100k	939
##	120	Mormon	\$75-100k	85
##	121	Muslim	\$75-100k	16
##	122	Orthodox	\$75-100k	38
##	123	Other Christian	\$75-100k	18
##	124	Other Faiths	\$75-100k	46
##	125	Other World Religions	\$75-100k	3
##	126	Unaffiliated	\$75-100k	407
##	127	Agnostic	\$100-150k	109
##	128	Atheist	\$100-150k	59
##	129	Buddhist	\$100-150k	39
##	130	Catholic	\$100-150k	792
##	131	Don't know/refused	\$100-150k	17
##	132	Evangelical Prot	\$100-150k	723
##	133	Hindu	\$100-150k	48
			·	
##		Historically Black Prot	\$100-150k	81
##	135	Jehovah's Witness	\$100-150k	11
##	136	Jewish	\$100-150k	87
##	137	Mainline Prot	\$100-150k	753
##	138	Mormon	\$100-150k	49
##	139	Muslim	\$100-150k	8
##	140	Orthodox	\$100-150k	42
##	141	Other Christian	\$100-150k	14
##	142	Other Faiths	\$100-150k	40
##	143	Other World Religions	\$100-150k	4
##	144	Unaffiliated	\$100-150k	321

##	145	Agnostic		>150k	84
##	146	Atheist		>150k	74
##	147	Buddhist		>150k	53
##	148	Catholic		>150k	633
##	149	Don't know/refused		>150k	18
##	150	Evangelical Prot		>150k	414
##	151	Hindu		>150k	54
##	152	Historically Black Prot		>150k	78
##	153	Jehovah's Witness		>150k	6
##	154	Jewish		>150k	151
##	155	Mainline Prot		>150k	634
##	156	Mormon		>150k	42
##	157	Muslim		>150k	6
##	158	Orthodox		>150k	46
##	159	Other Christian		>150k	12
##	160	Other Faiths		>150k	41
##	161	Other World Religions		>150k	4
##	162	Unaffiliated		>150k	258
##	163	Agnostic	Don't	know/refused	96
##	164	Atheist	Don't	know/refused	76
##	165	Buddhist	Don't	know/refused	54
##	166	Catholic	Don't	know/refused	1489
##	167	Don't know/refused	Don't	know/refused	116
##	168	Evangelical Prot	Don't	know/refused	1529
##	169	Hindu	Don't	know/refused	37
##	170	Historically Black Prot	Don't	know/refused	339
##	171	Jehovah's Witness	Don't	know/refused	37
##	172	Jewish	Don't	know/refused	162
##	173	Mainline Prot	Don't	know/refused	1328
##	174	Mormon	Don't	know/refused	69
##	175	Muslim	Don't	know/refused	22
##	176	Orthodox	Don't	know/refused	73
##	177	Other Christian	Don't	know/refused	18
##	178	Other Faiths	Don't	know/refused	71
##	179	Other World Religions	Don't	know/refused	8
##	180	Unaffiliated	Don't	know/refused	597

Let's parse this out. First we see this new operator %>%, which you can think of as the word "then". So we start with the dataset pew, "then" we gather its columns into two columns, income and frequency. We don't want the religion column to be part of this operation, so we "minus" it out, which says, don't do this gather operation on the religion column, but use everything else. The religion column gets repeated as needed.

The %>% operator can be easily typed in RStudio using the shortcut Ctrl-Shift-M (Cmd-Shift-M on a Mac)

This is now a tidy dataset, since each column is a single variable, each row is a single observation

4.1.2 Multiple variables in column names

```
tb <- import('data/tb.csv') %>% as_tibble()
head(tb)
   # A tibble: 6 x 22
                                  m014 m1524 m2534 m3544 m4554 m5564
##
     iso2
                     m<sub>04</sub>
                           m514
                                                                            m65
             year
                                                                                    mu
                                 <int> <int> <int> <int> <int><</pre>
##
     <chr> <int> <int>
                          <int>
                                                                         <int>
                                                                                <int>
##
  1 AD
             1989
                      NA
                             NA
                                    NA
                                           NA
                                                  NA
                                                        NA
                                                               NA
                                                                      NA
                                                                             NA
                                                                                    NA
   2 AD
             1990
                                    NA
##
                      NA
                             NA
                                           NA
                                                  NA
                                                        NA
                                                               NA
                                                                      NA
                                                                             NA
                                                                                    NA
##
   3 AD
             1991
                      NA
                             NA
                                    NA
                                           NA
                                                  NA
                                                        NA
                                                               NA
                                                                      NA
                                                                             NA
                                                                                    NA
##
  4 AD
             1992
                      NA
                             NA
                                    NA
                                           NA
                                                  NA
                                                        NA
                                                               NA
                                                                      NA
                                                                             NA
                                                                                    NA
##
  5 AD
             1993
                      NA
                             NA
                                    NA
                                           NA
                                                  NA
                                                        NA
                                                               NA
                                                                      NA
                                                                             NA
                                                                                    NA
## 6 AD
             1994
                      NA
                             NA
                                    NA
                                           NA
                                                  NA
                                                        NA
                                                               NA
                                                                      NA
                                                                             NA
                                                                                    NA
   # ... with 10 more variables: f04 <int>, f514 <int>, f014 <int>,
        f1524 <int>, f2534 <int>, f3544 <int>, f4554 <int>, f5564 <int>,
        f65 <int>, fu <int>
## #
```

Notice that the column names contain both sex and age group data. First we'll gather the sex/age columns, as before. Note that there are many missing values in this dataset. These are denoted in R by NA.

```
tb %>%
  gather(sex_age, n, -iso2, -year, -fu)
    # A tibble: 109,611 x 5
##
##
        iso2
                 year
                            fu sex_age
                                                n
##
        <chr> <int> <int> <chr>
                                           <int>
     1 AD
                 1989
                            NA m<sub>0</sub>4
##
                                               NA
##
     2 AD
                 1990
                            NA m<sub>0</sub>4
                                               NA
##
     3 AD
                 1991
                            NA m04
                                               NA
##
     4 AD
                 1992
                            NA m<sub>0</sub>4
                                               NA
     5 AD
                 1993
                            NA m<sub>0</sub>4
                                               NA
##
##
     6 AD
                 1994
                            NA m<sub>0</sub>4
                                               NA
##
     7 AD
                 1996
                            NA m04
                                               NA
##
     8 AD
                 1997
                            NA m<sub>0</sub>4
                                               NA
##
     9 AD
                 1998
                            NA m<sub>0</sub>4
                                               NA
## 10 AD
                 1999
                            NA m04
                                               NA
   # ... with 109,601 more rows
```

Since there are a lot of missing values here, we can drop them in the above step by adding an option.

```
tb %>% gather(sex_age, n, -iso2, -year, -fu, na.rm=T)
## # A tibble: 35,478 x 5
## iso2 year fu sex_age n
```

```
##
       <chr> <int> <int> <chr>
                                     <int>
##
    1 AD
               2005
                         0 m04
                                          0
##
    2 AD
               2006
                         0 m04
                                          0
##
    3 AD
               2008
                         0 m04
                                          0
```

```
##
     4 AE
                 2006
                           NA m04
                                               0
##
     5 AE
                 2007
                           NA m<sub>0</sub>4
                                               0
##
     6 AE
                 2008
                             0 m04
                                               0
##
     7 AG
                 2007
                           NA m<sub>0</sub>4
                                               0
##
     8 AL
                 2005
                             0 m04
                                               0
##
     9 AL
                 2006
                             0 m04
                                               1
                 2007
## 10 AL
                             0 m04
                                               0
## # ... with 35,468 more rows
```

We can now use the function separate to separate the data in the sex_age column into sex and age. In this case we have have the data in a fixed width format (the 1st element is the sex data), so we can use that:

```
tb %>%
  gather(sex_age, n, -iso2, -year, -fu, na.rm=T) %>%
  separate(sex_age, c("sex", "age"), sep=1)
   # A tibble: 35,478 x 6
##
##
      iso2
              year
                       fu sex
                                 age
                                             n
##
      <chr> <int> <int> <chr> <chr> <int>
##
    1 AD
              2005
                         0 m
                                 04
                                             0
##
    2 AD
              2006
                                 04
                                             0
                        0 m
##
    3 AD
              2008
                        0 m
                                 04
                                             0
##
    4 AE
              2006
                       NAm
                                 04
                                             0
##
    5 AE
              2007
                       NAm
                                 04
                                             0
##
    6 AE
              2008
                        0 m
                                 04
                                             0
##
    7 AG
              2007
                                             0
                       NAm
                                 04
                                             0
##
    8 AL
              2005
                        0 m
                                 04
##
    9 AL
              2006
                                 04
                                             1
                        0 m
## 10 AL
              2007
                        0 m
                                 04
                                             0
   # ... with 35,468 more rows
```

If the data was separated by a symbol, like _, we would use sep = "_" instead.

4.1.3 Variables stored in rows and columns

```
weather <- import('data/weather.csv') %>% as_tibble()
weather
##
  # A tibble: 22 x 35
##
              year month element
                                        d1
                                              d2
                                                     d3
                                                            d4
                                                                   d5
                                                                          d6
                                                                                 d7
      id
##
       <chr> <int> <int> <chr>
                                    <dbl>
                                           <dbl>
                                                  <dbl> <dbl>
                                                               <dbl> <dbl>
                                                                             <dbl>
##
    1 MX17~
              2010
                         1 tmax
                                        NA
                                            NA
                                                   NA
                                                            NA
                                                                 NA
                                                                          NA
                                                                                 NA
    2 MX17~
              2010
                         1 tmin
##
                                        NA
                                            NA
                                                   NA
                                                            NA
                                                                 NA
                                                                          NA
                                                                                 NA
    3 MX17~
              2010
                                        NA
                                            27.3
                                                   24.1
                                                                 NA
                                                                          NA
                                                                                 NA
##
                         2 tmax
                                                            NA
##
    4 MX17~
              2010
                         2 tmin
                                        NA
                                            14.4
                                                   14.4
                                                            NA
                                                                 NA
                                                                          NA
                                                                                 NA
##
    5 MX17~
              2010
                                        NA
                                            NA
                                                   NA
                                                            NA
                                                                 32.1
                                                                          NA
                                                                                 NA
                         3 tmax
##
    6 MX17~
              2010
                         3 tmin
                                        NA
                                            NA
                                                   NA
                                                            NA
                                                                 14.2
                                                                          NA
                                                                                 NA
##
    7 MX17~
              2010
                         4 tmax
                                        NA
                                            NA
                                                   NA
                                                            NA
                                                                 NA
                                                                          NA
                                                                                 NA
```

```
##
    8 MX17~
             2010
                       4 tmin
                                     NA
                                         NA
                                                NA
                                                        NA
                                                             NA
                                                                     NA
                                                                            NA
##
    9 MX17~
             2010
                       5 tmax
                                         NA
                                                NA
                                                        NA
                                                             NA
                                                                     NA
                                                                            NA
                                     NA
  10 MX17~
             2010
                       5 tmin
                                                NA
                                                             NA
                                                                     NA
                                                                            NA
##
                                     NA
                                         NA
                                                        NA
   # ... with 12 more rows, and 24 more variables: d8 <dbl>, d9 <lgl>,
##
       d10 <dbl>, d11 <dbl>, d12 <lgl>, d13 <dbl>, d14 <dbl>, d15 <dbl>,
##
##
       d16 <dbl>, d17 <dbl>, d18 <lgl>, d19 <lgl>, d20 <lgl>, d21 <lgl>,
       d22 <lgl>, d23 <dbl>, d24 <lgl>, d25 <dbl>, d26 <dbl>, d27 <dbl>,
##
   #
## #
       d28 <dbl>, d29 <dbl>, d30 <dbl>, d31 <dbl>
```

Here, for each year and month, the data for each day of the month is stored in columns. For each day, two values are noted – the max (tmax) and min (tmin) temperature that day, stored as rows.

We start by gathering the extra columns as before:

```
weather %>%
  gather(day, temp, d1:d31)
   # A tibble: 682 x 6
##
##
      id
                year month element day
                                              temp
##
      <chr>
               <int> <int> <chr>
                                      <chr>
                                            <dbl>
    1 MX17004
                2010
                          1 tmax
                                      d1
                                                NA
##
##
    2 MX17004
                2010
                          1 tmin
                                      d1
                                                NA
    3 MX17004
##
                2010
                          2 tmax
                                      d1
                                                NA
    4 MX17004
                2010
                          2 tmin
                                      d1
                                                NA
##
    5 MX17004
##
                2010
                          3 tmax
                                      d1
                                                NA
##
    6 MX17004
                2010
                          3 tmin
                                      d1
                                                NA
    7 MX17004
                                                NA
##
                2010
                          4 tmax
                                      d1
##
    8 MX17004
                2010
                          4 tmin
                                      d1
                                                NA
##
    9 MX17004
                2010
                          5 tmax
                                      d1
                                                NA
## 10 MX17004
                2010
                          5 tmin
                                      d1
                                                NA
## # ... with 672 more rows
```

Here's a new notation – d1:d31. This means all columns starting at d1 and ending at d31. This notation is originally from creating sequences of numbers. See what happens if you type 1:30 in the console.

Now, for each date, we have two *rows* of data. These need to be two *columns* of data. So we need to do the reverse operation from gather. This is called spread.

```
weather %>%
  gather(date, temp, d1:d31) %>%
  spread(element, temp)
##
   # A tibble: 341 x 6
                year month date
##
      id
                                    tmax
                                           tmin
      <chr>
               <int> <int> <chr> <dbl> <dbl>
##
    1 MX17004
                2010
                          1 d1
##
                                       NA
                                             NA
##
    2 MX17004
                2010
                          1 d10
                                       NA
                                             NA
##
    3 MX17004
                2010
                          1 d11
                                       NA
                                             NA
    4 MX17004
                          1 d12
                                       NA
                                             NA
##
                2010
##
    5 MX17004
                2010
                          1 d13
                                       NA
                                             NA
```

4.2. DATA CLEANING 31

```
##
                          1 d14
                                       NA
                                              NA
    6 MX17004
                2010
##
    7 MX17004
                2010
                          1 d15
                                       NA
                                              NA
##
    8 MX17004
                          1 d16
                                       NA
                                              NA
                2010
    9 MX17004
                2010
                           1 d17
                                       NA
                                              NA
##
## 10 MX17004
                2010
                          1 d18
                                       NA
                                              NA
## # ... with 331 more rows
```

We tell spread which column should form column names and which should provide the data for the columns.

4.2 Data cleaning

The weather data set shows that we still need to do a bit more cleaning to this data to make it workable. Mainly, we need to fix the dat column to make it numeric. Note the odd ordering, where d1 is followed by d10. This is an *alphabetical* ordering rather than a *numeric* ordering. We'll now add to our pipeline (sentence) to make this happen:

```
weather %>%
  gather(date, temp, d1:d31) %>%
  spread(element, temp) %>%
  mutate(date = parse_number(date))
  # A tibble: 341 x 6
##
##
       id
                 year month
                              date
                                            tmin
                                     tmax
       <chr>>
                <int> <int>
                             <dbl>
                                   <dbl>
                                           <dbl>
##
                           1
                                 1
                                       NA
                                              NA
##
    1 MX17004
                2010
    2 MX17004
                2010
                                10
                                       NA
##
                           1
                                              NA
    3 MX17004
                2010
                           1
                                       NA
                                              NA
##
                                11
##
    4 MX17004
                2010
                           1
                                12
                                       NA
                                              NA
    5 MX17004
                                       NA
##
                2010
                           1
                                13
                                              NA
    6 MX17004
                2010
                           1
                                14
                                       NA
                                              NA
##
    7 MX17004
##
                           1
                                15
                                       NA
                                              NA
                2010
##
    8 MX17004
                2010
                           1
                                16
                                       NA
                                              NA
    9 MX17004
##
                2010
                           1
                                17
                                       NA
                                              NA
## 10 MX17004
                 2010
                           1
                                18
                                       NA
                                              NA
## # ... with 331 more rows
```

Here we introduce another "verb", mutate. This function changes a column, either in-place as we did here, or by creating a new variable.

The data is still not quite in the right format, since the date column is in a weird order. We can add another verb to this pipe to fix that: arrange.

```
weather %>%
  gather(date, temp, d1:d31) %>%
  spread(element, temp) %>%
  mutate(date = parse_number(date)) %>%
  arrange(date)
```

A tibble: 341 x 6

```
##
      id
                 year month
                               date
                                      tmax
                                             tmin
##
       <chr>>
                <int> <int>
                             <dbl>
                                    <dbl>
                                            <dbl>
##
    1 MX17004
                 2010
                           1
                                        NA
                                  1
                                               NA
                           2
##
    2 MX17004
                 2010
                                  1
                                        NA
                                               NA
##
    3 MX17004
                 2010
                           3
                                  1
                                        NA
                                               NA
##
    4 MX17004
                 2010
                           4
                                  1
                                        NA
                                               NA
    5 MX17004
                           5
##
                 2010
                                  1
                                        NA
                                               NA
##
    6 MX17004
                 2010
                           6
                                  1
                                        NA
                                               NA
    7 MX17004
                           7
##
                 2010
                                  1
                                        NA
                                               NA
##
    8 MX17004
                 2010
                           8
                                  1
                                        NA
                                               NA
##
    9 MX17004
                 2010
                          10
                                  1
                                        NA
                                               NA
## 10 MX17004
                 2010
                          11
                                   1
                                        NA
                                               NA
## # ... with 331 more rows
```

Not quite, right? We're not used to seeing all the 1st of the months together, and so forth. We want all the daes for month 1, then all the dates for month two, and so on. This can be done by modifying the arrange command, by sorting first by month and then by date (essentially within month).

```
weather %>%
  gather(date, temp, d1:d31) %>%
  spread(element, temp) %>%
  mutate(date = parse_number(date)) %>%
  arrange(month, date)
```

```
# A tibble: 341 x 6
##
      id
##
                 year month
                              date
                                     tmax
                                            tmin
##
       <chr>
                <int> <int> <dbl> <dbl>
                                           <dbl>
##
    1 MX17004
                 2010
                           1
                                  1
                                        NA
                                               NA
##
    2 MX17004
                 2010
                           1
                                  2
                                        NA
                                               NA
    3 MX17004
                           1
                                  3
                                        NA
                                               NA
##
                 2010
    4 MX17004
##
                 2010
                           1
                                  4
                                        NA
                                               NA
                 2010
##
    5 MX17004
                           1
                                  5
                                        NA
                                               NA
##
    6 MX17004
                 2010
                           1
                                  6
                                        NA
                                               NA
##
    7 MX17004
                 2010
                                  7
                                        NA
                                               NA
                           1
    8 MX17004
##
                 2010
                           1
                                  8
                                        NA
                                               NA
    9 MX17004
##
                 2010
                           1
                                  9
                                        NA
                                               NA
  10 MX17004
                 2010
                           1
                                 10
                                        NA
                                               NA
  # ... with 331 more rows
```

Finally, if we want to save this, we need to assign this final product a name.

```
weather2 <- weather %>%
  gather(date, temp, d1:d31) %>%
  spread(element, temp) %>%
  mutate(date = parse_number(date)) %>%
  arrange(month, date)
```

Exercise

The file data/mbta.xlsx contains monthly data on number of commuter trips by different modalities on the MBTA system n Boston. It is in a messy format. It also has an additional quirk in that it has a title on the first line that isn't even data. You can avoid loading that in by using the option skip=1 (i.e. skip the first line) when you import. Work through this process to clean this dataset into tidy form. I'll also note that you can "minus" columns by position as well as name, so gather(date, avg_trips, -1, -mode) is valid to not involve the first column and the mode column.

4.3 Cleaning up data types and values

After you have tidied your data, lets call that tidy dataset mbta2.

mbta2

```
##
   # A tibble: 638 x 5
##
         ...1 mode
                                        month avg_trips
                                 year
      <dbl> <chr>
                                 <chr> <chr> <chr>
##
##
    1
           1 All Modes by Qtr
                                 2007
                                        01
                                               NA
##
    2
           2 Boat
                                 2007
                                        01
                                               4
    3
           3 Bus
                                 2007
                                               335.819
##
                                        01
##
           4 Commuter Rail
                                 2007
                                        01
                                               142.2
##
    5
           5 Heavy Rail
                                 2007
                                        01
                                               435.294
           6 Light Rail
                                               227.231
##
    6
                                 2007
                                        01
           7 Pct Chg / Yr
    7
                                 2007
                                        01
                                               0.02
##
           8 Private Bus
                                               4.772
##
    8
                                 2007
                                        01
           9 RTDF
##
                                 2007
                                        01
                                               4.9
          10 Trackless Trolley 2007
                                               12.757
                                        01
   # ... with 628 more rows
```

We see that there's still some issues. If you look at the top of the dataset, you'll see that year, month and avg_trips are all *character* variables and not *numeric* variables. (You can see this if you converted to a tibble using as_tibble. Otherwise, type str(mbta2) at the console). Also, there is this odd column with the name ..1 that is just an index of rows. Lastly, the row marked TOTAL is not necessary since it's a derived row, and the All Modes by Qtr row is missing in many times, and appears inconsistent with TOTAL.

First, let's deal with the type issue.

```
mbta2 %>%
  mutate(
    year = parse_number(year),
    month = parse_number(month),
    avg_trips = parse_number(avg_trips)
)
```

```
1 All Modes by Qtr
                                                   NA
##
                                  2007
                                            1
    2
          2 Boat
                                  2007
                                            1
                                                    4
##
    3
                                                  336.
##
           3 Bus
                                  2007
                                            1
    4
          4 Commuter Rail
                                  2007
                                                  142.
##
                                            1
    5
          5 Heavy Rail
                                  2007
                                            1
                                                  435.
##
##
   6
           6 Light Rail
                                  2007
                                            1
                                                  227.
           7 Pct Chg / Yr
##
    7
                                  2007
                                            1
                                                    0.02
           8 Private Bus
    8
                                  2007
                                            1
                                                    4.77
##
   9
          9 RIDE
                                  2007
                                                    4.9
##
                                            1
         10 Trackless Trolley
## 10
                                  2007
                                            1
                                                   12.8
## # ... with 628 more rows
```

A more advanced version of this operation would be

```
mbta2 %>%
  mutate_at(vars(year, month, avg_trips), parse_number)
```

Next we want to get rid of that first column. The verb we'll use here is select.

```
mbta2 %>%
  mutate(
    year = parse_number(year),
    month = parse_number(month),
    avg_trips = parse_number(avg_trips)
) %>%
  select(-1) # Get rid of 1st column
```

```
## # A tibble: 638 x 4
##
      mode
                           year month avg_trips
      <chr>>
                          <dbl> <dbl>
                                            <dbl>
##
    1 All Modes by Qtr
                           2007
                                     1
                                           NA
##
    2 Boat
                           2007
                                             4
##
                                     1
    3 Bus
                                          336.
##
                           2007
                                     1
##
    4 Commuter Rail
                           2007
                                          142.
                                     1
    5 Heavy Rail
##
                           2007
                                     1
                                          435.
    6 Light Rail
                                          227.
##
                           2007
                                     1
   7 Pct Chg / Yr
##
                           2007
                                     1
                                             0.02
    8 Private Bus
                                            4.77
##
                           2007
                                     1
   9 RIDE
                                            4.9
##
                           2007
                                     1
## 10 Trackless Trolley
                           2007
                                     1
                                            12.8
## # ... with 628 more rows
```

Lastly, we want to get rid of rows where mode equals TOTAL or "All Modes by Qtr". Our verb here is filter.

```
mbta3 <- mbta2 %>%
  mutate(
    year = parse_number(year),
    month = parse_number(month),
    avg_trips = parse_number(avg_trips)
) %>%
```

```
select(-1) %>%
filter(mode != 'TOTAL', mode != "All Modes by Qtr")
```

Note that the strings in quotes have to be exact matches to what you want to look for. The != means "not equals".

We're assigning this to a new variable, mbta3, which is our clean dataset.

In R, filtering refers to keeping or removing *rows* that meet some criterion; selecting refers to keeping or removing *columns*. The corresponding "verbs" to put into your pipeline are filter and select.

4.4 Other types of cleaning

There are different functions that you can apply to a dataset for different cleaning purposes. A selection are given below:

- 1. distinct() keeps the unique (non-duplicate) rows of a dataset. Usage: dataset %>%
 distinct()
- 2. If you want to keep only rows with complete data, you can invoke drop_na. Usage: dataset %>% drop_na(). You can modify drop_na by specifying variables from which you want to drop the missing values.
- 3. If you want to convert a value to missing (commonly 99 is used for missing data), then you can use replace_na within mutate to change to missing values on a column-by-column basis. Usage: dataset %>% mutate(var1 = na_if(var1, 99))

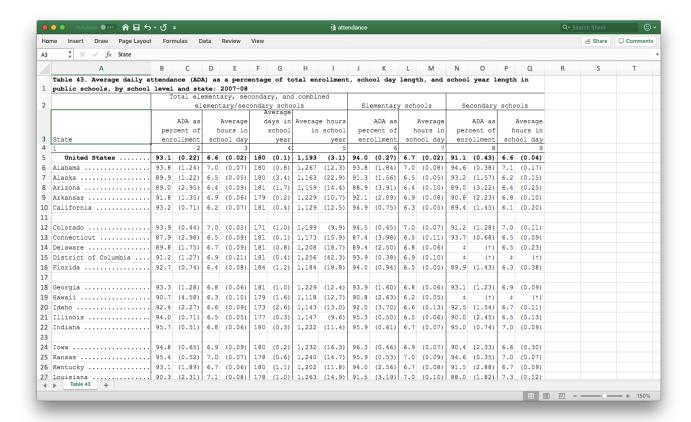
4.5 Cleaning from Excel files

Excel, being omnipresent, creates its own sets of difficulties. Excel, on top of being a data entry and analysis platform, is also a visual platform, so tables are often created to look good rather than be tidy. Things we commonly find in Excel files include colored rows and columns, multiple lines of headers, multiple rows with variables, typos resulting in numeric data becoming string data, and many others.

4.6 Cleaning from Excel files

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Let's start with a data set that's structured similarly to many government datasets around the world.



Notice that there are two levels of headers on top, each spanning multiple columns. Data is in paired columns, with the first column being the statistic and the second column being its standard error. The first row is a title, which we don't need, and the 4th row is also not needed.

We'll first tidy-fy this dataset, and then we'll clean it up a bit. Let's first think about the structure we want to get to for tidy-fication. The actual data lies in the statistics and the standard errors, and each of the column groupings represents different variables, so they should be in columns.

You can try to load this data using import, but you'll find it's a big mess. There are two powerful packages (by the same group of developers), tidyxl and unpivotr, that are fantastic tools for "fixing" Excel files for analysis.

Let's start with tidyxl.

2 Tabl~ B1

3 Tabl~ C1

##

##

1

```
library(tidyxl)
```

```
## Warning: package 'tidyxl' was built under R version 3.5.2
dataset1 <- xlsx_cells('data/attendance.xlsx')</pre>
dataset1
   # A tibble: 1,173 x 21
##
      sheet address
                              col is_blank data_type error logical numeric
                       row
                     <int> <int> <lgl>
##
      <chr> <chr>
                                            <chr>
                                                      <chr> <lgl>
                                                                       <dbl>
##
    1 Tabl~ A1
                                1 FALSE
                                           character <NA>
                                                             NA
                                                                           NA
                         1
```

blank

blank

<NA>

<NA>

NA

NA

NA

NA

2 TRUE

3 TRUE

```
4 Tabl~ D1
                                4 TRUE
                                                       <NA>
                                                                           NA
##
                         1
                                            blank
                                                             NA
##
    5 Tabl~ E1
                         1
                                5 TRUE
                                            blank
                                                       <NA>
                                                             NA
                                                                           NA
##
    6 Tabl~ F1
                         1
                                6 TRUE
                                            blank
                                                       <NA>
                                                             NA
                                                                           NA
    7 Tabl~ G1
                         1
##
                                7 TRUE
                                            blank
                                                       <NA>
                                                             NA
                                                                           NA
##
    8 Tabl~ H1
                         1
                                8 TRUE
                                            blank
                                                       <NA>
                                                             NA
                                                                           NA
##
    9 Tabl~ I1
                         1
                                9 TRUE
                                            blank
                                                       <NA>
                                                             NA
                                                                           NA
## 10 Tabl~ J1
                         1
                               10 TRUE
                                                       <NA>
                                            blank
                                                             NA
                                                                           NA
##
   # ... with 1,163 more rows, and 12 more variables: date <dttm>,
       character <chr>, character_formatted <list>, formula <chr>,
##
       is_array <lgl>, formula_ref <chr>, formula_group <int>, comment <chr>,
##
       height <dbl>, width <dbl>, style_format <chr>, local_format_id <int>
## #
```

Notice that this pulls in a lot of meta-data in a tidy form, including information about cell formatting. This will be really useful in many situations.

First, lets get rid of the rows we don't need.

```
dataset1 <- dataset1 %>% filter(row != 1, row != 4, row < 65)
```

Now we could manipulate this dataset using tidyverse tools, but unpivotr is much mor poweful. First, we are going to pull off the two headers. unpivotr does this using the function behead (suggestive?), with the first argument being the direction ('N', "S", 'E', 'W', etc) of the table that the header is present. We will also consider the first column, consisting of state names, as a header on the left.

```
library(unpivotr)
```

Warning: package 'unpivotr' was built under R version 3.5.2

```
dataset1 %>%
  behead('N', tophead) %>%
  behead('N', head2) %>%
  behead('W', State) %>%
  select(row, col, data_type, numeric, tophead, head2, State)
```

```
##
  # A tibble: 960 x 7
                                numeric tophead
##
         row
               col data_type
                                                                  head2
                                                                             State
      <int> <int> <chr>
                                  <dbl> <chr>
                                                                  <chr>
##
                                                                             <chr>
           5
                  2 numeric
                                9.31e+1 Total elementary, se~ ADA as p~ "
##
    1
                                                                                 Unit~
    2
           5
                  3 numeric
                                2.19e-1 <NA>
                                                                  <NA>
##
                                                                                 Unit~
                                                                  Average ~ "
##
    3
           5
                  4 numeric
                                6.64e+0 <NA>
                                                                                 Unit~
                                                                             11
    4
           5
                  5 numeric
                                1.76e-2 <NA>
                                                                  <NA>
                                                                                 Unit~
##
                  6 numeric
                                                                  Average ~ "
##
    5
           5
                                1.80e+2 <NA>
                                                                                 Unit~
                                                                             "
##
    6
           5
                  7 numeric
                                1.43e-1 <NA>
                                                                  <NA>
                                                                                 Unit~
                                                                                 Unit~
##
    7
           5
                  8 numeric
                                1.19e+3 <NA>
                                                                  Average ~ "
                                                                             11
    8
           5
                 9 numeric
                                3.09e+0 <NA>
                                                                  <NA>
                                                                                 Unit~
##
    9
                                9.40e+1 Elementary schools
                                                                  ADA as p~ "
                                                                                 Unit~
##
           5
                10 numeric
                                2.69e-1 <NA>
                                                                  <NA>
                                                                                 Unit~
## 10
           5
                11 numeric
   # ... with 950 more rows
```

We need to separate the statistics and the standard errors from consecutive columns, and also make them headers.

```
dataset1 %>%
  behead('N', tophead) %>%
  behead('N', head2) %>%
  behead('W', State) %>%
  select(row, col, data_type, numeric, tophead, head2, State) %>%
  mutate(header = ifelse(col %% 2 == 0, 'stats', 'se'))
   # A tibble: 960 x 8
##
##
                               numeric tophead
                                                          head2
        row
               col data_type
                                                                    State
                                                                              header
                                  <dbl> <chr>
##
      <int> <int> <chr>
                                                           <chr>>
                                                                    <chr>
                                                                              <chr>>
           5
                 2 numeric
                               9.31e+1 Total elementar~ ADA as ~ "
                                                                         Uni~ stats
##
    1
##
    2
           5
                 3 numeric
                               2.19e-1 <NA>
                                                           <NA>
                                                                         Uni~ se
           5
##
    3
                 4 numeric
                               6.64e+0 <NA>
                                                          Average~ "
                                                                         Uni~ stats
    4
          5
                 5 numeric
                               1.76e-2 <NA>
                                                           <NA>
                                                                         Uni~ se
##
                               1.80e+2 <NA>
                                                          Average~ "
                 6 numeric
                                                                         Uni~ stats
##
    5
          5
    6
           5
                 7 numeric
                               1.43e-1 < NA >
                                                           <NA>
                                                                         Uni~ se
##
          5
                 8 numeric
                               1.19e+3 <NA>
                                                          Average~ "
                                                                         Uni~ stats
##
    7
                 9 numeric
                                                           <NA>
                                                                         Uni~ se
##
    8
           5
                               3.09e+0 < NA >
##
    9
          5
                10 numeric
                               9.40e+1 Elementary scho~ ADA as ~ "
                                                                         Uni~ stats
           5
                                                                         Uni~ se
## 10
                11 numeric
                               2.69e-1 <NA>
                                                           <NA>
## # ... with 950 more rows
```

The %% operator computes the remainder if the left side is divided by the right side. So the criterion is asking which columns are even. The ifelse statement says, if the criterion is met, write "stats", otherwise write "se". This new variable is assigned to the dataset with the variable name "header".

Notice that we have actually tidy-fied this dataset, but there's missing data here, since the column headers span several rows visually but are only credited to the first column it covers. So we need to fill in the entries for the remaining rows with the corresponding entry from the earliest column. There is a function fill in tidyr that does this general trick, using a method called *last value carried forward*.

```
dataset1 %>%
  behead('N', tophead) %>%
  behead('N', head2) %>%
  behead('W', State) %>%
  select(row, col, data_type, numeric, tophead, head2, State) %>%
  fill(tophead) %>%
  fill(head2)
```

```
##
  # A tibble: 960 x 7
               col data type
                               numeric tophead
##
        row
                                                               head2
                                                                          State
##
      <int> <int> <chr>
                                 <dbl> <chr>
                                                               <chr>>
                                                                          <chr>
##
    1
          5
                 2 numeric
                               9.31e+1 Total elementary, se~ ADA as p~ "
                                                                              Unit~
          5
    2
                 3 numeric
                               2.19e-1 Total elementary, se~ ADA as p~ "
                                                                              Unit~
##
    3
          5
                 4 numeric
                               6.64e+0 Total elementary, se~ Average ~ "
                                                                              Unit~
##
                               1.76e-2 Total elementary, se~ Average ~ "
##
    4
          5
                 5 numeric
                                                                              Unit~
##
          5
                 6 numeric
    5
                               1.80e+2 Total elementary, se~ Average ~ "
                                                                              Unit~
##
    6
          5
                 7 numeric
                               1.43e-1 Total elementary, se~ Average ~ "
                                                                              Unit~
##
    7
          5
                 8 numeric
                               1.19e+3 Total elementary, se~ Average ~ "
                                                                              Unit~
```

```
3.09e+0 Total elementary, se~ Average ~ "
##
   8
          5
                9 numeric
                                                                           Unit~
   9
          5
               10 numeric
                             9.40e+1 Elementary schools
                                                            ADA as p~ "
                                                                           Unit~
##
          5
                             2.69e-1 Elementary schools
                                                            ADA as p~ "
                                                                           Unit~
## 10
               11 numeric
## # ... with 950 more rows
```

To make this really tidy, we need to make two columns titled stats and se from this. We've seen this using spread, but there is a slightly more robust method from unpivotr called spatter which is meant for this unique structure.

```
tidy_dataset <- dataset1 %>%
  behead('N', tophead) %>%
  behead('N', head2) %>%
  behead('W', State) %>%
  select(row, col, data_type, numeric, tophead, head2, State) %>%
  mutate(header = ifelse(col %% 2 == 0, 'stats','se')) %>%
  fill(tophead) %>%
  fill(head2) %>%
  select(row, numeric, tophead, head2, State, header) %>%
  spatter(header, numeric) %>%
  select(-row)
tidy_dataset
```

```
## # A tibble: 480 x 5
##
      tophead
                                      head2
                                                     State
                                                                           stats
      <chr>
                                      <chr>>
##
                                                     <chr>
                                                                    <dbl>
                                                                           <dbl>
                                      ADA as percen~ "
##
    1 Elementary schools
                                                         United ~ 0.269 9.40e1
    2 Elementary schools
                                      Average hours~ "
                                                         United ~ 0.0160 6.66e0
##
    3 Secondary schools
##
                                      ADA as percen~ "
                                                         United ~ 0.432 9.11e1
##
    4 Secondary schools
                                      Average hours~ "
                                                         United ~ 0.0403 6.59e0
    5 Total elementary, secondary, ~ ADA as percen~ "
                                                         United ~ 0.219 9.31e1
##
    6 Total elementary, secondary, ~ Average days ~ "
                                                         United ~ 0.143 1.80e2
##
   7 Total elementary, secondary, ~ Average hours~ "
                                                         United ~ 0.0176 6.64e0
##
    8 Total elementary, secondary, ~ Average hours~ "
                                                         United ~ 3.09
                                                                          1.19e3
##
   9 Elementary schools
                                      ADA as percen~ Alabama ...~ 1.84
                                                                          9.38e1
## 10 Elementary schools
                                      Average hours~ Alabama ...~ 0.0759 7.04e0
## # ... with 470 more rows
```

We have to clean the State variable. We'll use the methods in the stringr package, which is already loaded with the tidyverse.

```
tidy_dataset <- tidy_dataset %>%
mutate(State = str_remove(State, '\\.+')) %>%
mutate(State = str_trim(State))
```

The first verb removes all the . in the variable, using something called a regular expression. This particular expression means that we want to look for sequences of dots, and remove them. The $\$ before the . tells R that we really mean ., since the . has a different meaning in regular expressions.

The second verb trims away blank spaces before and after each entry.

We'll hold on to this dataset for the visualization section. Just to be safe, let's save it.

```
saveRDS(tidy_dataset, file = 'data/attendance.rds')
```

This saves the data in an R-specific format that will allow us to load it quickly.

The RDS format is an open standard and so it can be called from other programs if the appropriate programs are written.

Dealing with visual formating (colors)

The dataset we'll use for this has identifiable information, so I will not expose it publicly. It is available in your files as data/classlist.xlsx.

Since we're interested in background and font colors here, which are informative, we also need to load the format information into R.

```
library(tidyxl)
library(unpivotr)

dataset2 <- xlsx_cells('data/classlist.xlsx')
formats <- xlsx_formats('data/classlist.xlsx')

format_id <- dataset2$local_format_id
    dataset2$font_color <- formats$local$font$color$rgb[format_id]
    dataset2$bg_color <- formats$local$fill$patternFill$fgColor$rgb[format_id]

unique(dataset2$font_color)

## [1] "FFF000000" "FF0563C1" "FFFF0000"

unique(dataset2$bg_color)

## [1] "FFFFC000" NA "FFE7E6E6"</pre>
```

So we can filter rows based on these two colors if we want.

To tidy-fy this dataset, we realize that there are really two interweaved datasets. The odd rows are one dataset and the even rows are another dataset.

```
dat1 <- dataset2 %>%
  filter( row %% 2 == 1) %>% # odd rows
  behead('N', header) %>%
  mutate(row = (row+1)/2) # make the row numbers sequential

dat2 <- dataset2 %>%
  filter(row %% 2 == 0) %>% # even rows
  behead('N', header) %>%
  mutate(row = row/2) %>% # make row numbers sequential
  mutate(col = col+4) # These will be the last 4 cols of new data

tidy_dataset2 <-</pre>
```

```
rbind(dat1, dat2) %>% # Put datsets on top of each other
select(row, data_type, numeric, character, header) %>%
spatter(header) %>%
select(-row, -numeric)
```

We'll do a couple of finesse things to finish. First, we'll make the names with no spaces (they're a pain to write otherwise) and put the student name on the first column.

```
tidy_dataset2 <- tidy_dataset2 %>%
set_names(make.names(names(.))) %>%
select(Student.Name, everything())
```

make.names changes a vector of names into "approved" space-free format, replacing the space with .. One shortcut I've used is using . as an argument to names, which means that the . is replaced by the "noun" that is being acted on by the "verbs". You will notice that I can also do multiple verbs together to work sequentially.