

data cleaning principles

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These are slides for a talk for the csv,conf,v6 (<https://csvconf.com/>) on May 4-5, 2021.

Data analysts spend a lot of time organizing and cleaning data, but few of us have been trained to do so. Why is that?

Some say that data cleaning is difficult to generalize. But I think there are some general principles. Moreover, I think we have an important shared experience in data cleaning that we can commiserate about, and through which we can learn from each other.

Tidy data are all alike,
but every messy dataset
is messy in its own way.

– Hadley Wickham

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Hadley's talking more about data organization than data cleanliness. And his point is that if you make data tidy, it simplifies all the downstream analyses.

But **is** every messy dataset **uniquely** messy?

If I clean up [Medicare] data ...
does any of the knowledge I gain ...
apply to the processing of RNA-seq data?

– Roger Peng

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In his discussion of David Donoho's paper about data science, Roger Peng spoke about how data cleaning is frustratingly difficult to generalize.

But my answer to his question is **absolutely!**

A person with experience cleaning one dataset has important experience to draw upon when moving to another dataset even if it's of a totally different nature.

Data Mishaps Night

Join us for the first inaugural Data Mishaps Night!
We will feature a lineup of data mistake stories with
a focus on the human aspect of data work and
lessons learned the hard way.



dataMishapsNight.com

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In February, 2021, Caitlin Hudon and Laura Ellis organized an Friday evening conference where 16 people gave short presentations on data mishaps.

Many of the stories concerned mistakes in data cleaning, and while these weren't necessarily the most amusing stories, they did seem to bring out a strong sense of shared experience. We have suffered and struggled through very similar data problems.

Data cleaning

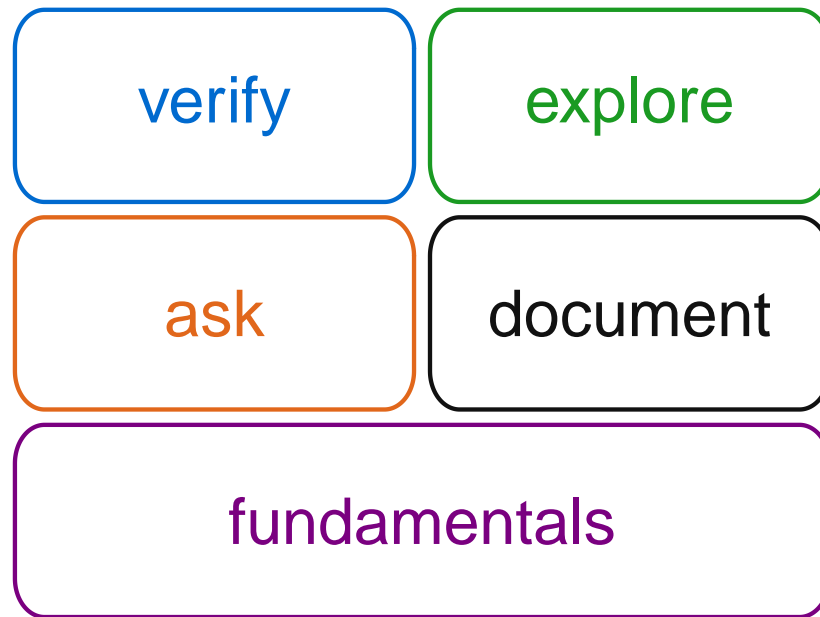
- ▶ tedious
- ▶ embarrassing
- ▶ needs context
- ▶ doesn't feel like progress
- ▶ requires creativity
- ▶ requires coding prowess
- ▶ source of most problems

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Really, I think we don't usually teach data cleaning because it's something we prefer to keep private.

We're shy about it.

And data cleaning code is our ugliest code.



I'm proposing a set of basic principles for data cleaning, and splitting them into five groups. There are some fundamental principles, followed by four basic ideas: verify things that you expect, explore to find further oddities, ask questions, and document what you've done.

fundamentals

1. Don't clean data when you're tired or hungry.

(paraphrasing Ghazal Gulati)

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At her talk at the Data Mishaps night, Ghazal Gulati emphasized this point, of not cleaning data when you're tired or hungry.

Data cleaning requires considerable concentration, and you need to allow sufficient time to do the work. If you're in a hurry, you'll miss things.

fundamentals

2. Don't trust anyone (even yourself)

“my motto is ‘trust no one’
...except maybe @kwbroman?”

– Jenny Bryan

fundamentals

3. Think about what might have gone wrong and how it might be revealed

Personally, I think this is the most important principle for data cleaning. It has been central in guiding my approach.

I need a good figure for this.

fundamentals

4. Use care in merging

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show example of files with columns in different orders

fundamentals

5. Dates & categories suck

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You may ask, “How is that a principle?”

Principle:

A fundamental truth that guides our thinking

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I was thinking the same thing. Was I drifting away from principles and more to just stuff to know or do? This seems a pretty good definition.

fundamentals

5. Dates & categories suck

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So yeah, this counts as a principle.

Much of the pain will be in the dates and categorical data; you should be ready for that.

verify

6. Check that distinct things are distinct

verify

7. Check that matching things match

verify

8. Check calculations

verify

9. Look for other instances of a problem

explore

10. Make lots of plots

explore

11. Look at missing value patterns

explore

12. With massive data,
make more plots not fewer

explore

13. Follow up all artifacts

ask

- 14. Ask questions
- 15. Ask for the primary data
- 16. Ask for metadata
- 17. Ask why data are missing

document

- 18. Create checklists & pipelines
- 19. Document not just what but why
- 20. Expect to recheck

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