Lecture 4: Pipes and variable creation Managing and Manipulating Data Using R

Introduction

What we will do today

- 1. Introduction
 - 1.1 Data for lecture
- 2. Pipes
- 3. Creating variables using mutate (tidyverse approach)
 - 3.1 Introduce mutate() function
 - 3.2 Using ifelse() function within mutate()
 - 3.3 Using recode() function within mutate()
 - 3.4 Using case_when() function within mutate()
- 4. Base R appraoch to creating new variables

Libraries we will use today

"Load" the package we will use today (output omitted)

you must run this code chunk

library(tidyverse)

If package not yet installed, then must install before you load. Install in "console" rather than .Rmd file

- Generic syntax: install.packages("package_name")
- Install "tidyverse": install.packages("tidyverse")

Note: when we load package, name of package is not in quotes; but when we install package, name of package is in quotes:

- install.packages("tidyverse")
- library(tidyverse)

Data for lecture

Lecture 3 data: prospects purchased by Western Washington U.

The "Student list" business

- Universities identify/target "prospects" by buying "student lists" from College Board/ACT (e.g., \$.40 per prospect)
- Prospect lists contain contact info (e.g., address, email), academic achievement, socioeconomic, demographic characteristics
- Universities choose which prospects to purchase by filtering on criteria like zip-code, GPA, test score range, etc.

```
#load prospect list data
load(url("https://github.com/ozanj/rclass/raw/master/data/prospect_list/wwlist_
```

Object wwlist

- De-identified list of prospective students purchased by Western Washington University from College Board
- ▶ We collected these data using FOIA request
 - ASIDE: Become an expert on collecting data via FOIA requests and you will become a superstar!

Lecture 3 data: prospects purchased by Western Washington U.

Observations on wwlist

each observation represents a prospective student

```
typeof(wwlist)
#> [1] "list"
dim(wwlist)
#> [1] 268396     41
```

Variables on wwlist

- some vars provide de-identified data on individual prospects
 e.g., psat_range, state, sex, ethn_code
- some vars provide data about zip-code student lives in
 e.g., med_inc , pop_total , pop_black
- some vars provide data about school student enrolled in
 - e.g., fr_lunch is number of students on free/reduced lunch
 - note: bad merge between prospect-level data and school-level data

```
names(wwlist)
str(wwlist)
glimpse(wwlist) # tidyverse function, similar to str()
```

Lecture 3 data: prospects purchased by Western Washington U.

Variable firstgen identifies whether prospect is a first-generation college student

Imagine we want to isolate all the first-generation prospects

- 1. Investigate variable type/structure.
- A dichotomous var, but stored as character in wwlist . So must use quotes ('' or "") to filter/subset based on values of firstgen

```
str(wwlist$firstgen)
#> chr [1:268396] NA "N" "N" "N" NA "N" "N" "Y" "Y" "N" "N" "N" "N" "N"
```

2. Create frequency table to identify possible values of firstgen

```
table(wwlist$firstgen, useNA = "always")
#>
#>
       N
              Y < NA >
#> 193333 65046 10017
```

3. Isolate all the first-gen prospects

#> 4 2016-05-31 930-1160

#\ E 0016_0E_01 000_1160 U/

```
filter(wwlist, firstgen == "Y")
#> # A tibble: 65,046 x 41
      receive date psat range state zip9 for country sex hs ceeb code
#>
      \langle date \rangle \langle chr \rangle \langle chr \rangle \langle chr \rangle \langle chr \rangle
#>
                                                                       \langle i, n, t, \rangle
#> 1 2016-05-31 1170-1520
                                      9812~ <NA>
                                                                      481128
                               WA
#> 2 2016-05-31 930-1160 WA 9829~ <NA>
                                                         Μ
                                                                      481335
#> 3 2016-05-31 1030-1160 CO 8012~ <NA>
```

WA 9837~ <NA>

0011... /111

60926

480442

10100E

Pipes

What are "pipes", %>%

Pipes are a means of perfoming multiple steps in a single line of code

- ▶ When writing code, the pipe symbol is %>%
- Basic flow of using pipes in code:
 - b object %>% some_function %>% some_function %>% some_function
- Pipes work from left to right:
 - ► The object from left of %>% pipe symbol is input as the first argument of the function to the right of the %>% pipe symbol
 - In turn, the resulting output becomes the input (the first argument) of the function to the right of the next %>% pipe symbol
- Pipes are part of tidyverse suite of packages, not base R

Intuitive mnemonic device for understanding pipes

whenever you see a pipe %>% think of the words "and then..."

Example: isolate all the first-generation prospects [output omitted]

in words: start with object wwlist and then filter first generation students
wwlist %>% filter(firstgen == "Y")

Do task with and without pipes

```
Task: Using object wwlist print data for "first-gen" prospects ( firstgen == "Y" )
# without pipes
filter(wwlist, firstgen == "Y")
# with pipes
wwlist %>% filter(firstgen == "Y")
```

Comparing the two approaches:

- "without pipes", object wwlist is the first argument filter() function
- In "pipes" approach, you don't specify object wwlist as first argument in filter()
 - Why? Because %>% "pipes" the object to the left of the %>% operator into the function to the right of the %>% operator

Main takeaway:

- ▶ When writing code using pipes, functions to right of %>% pipe operator should not explicitly name object that is the input to the function.
- ▶ Rather, object to the left of %>% pipe operator is automatically the input.

More intuition on the pipe operator, %>%

The pipe operator "pipes" (verb) an object from left of %% operator into the function to the right of the %% operator

Example, the "structure" function str(), with and without pipes

Examine syntax for str(): str(object, ...)

?str

Investigate structure of dataframe wwlist without and with pipes

```
str(wwlist) # without pipe
wwlist %>% str() # with pipe
```

Questions:

- In the pipes approach, wwlist %>% str(), why didn't we need to insert argument values inside str()
- ▶ What would happen if we just ran this line of code?

str()

Do task with and without pipes

Task: Using object wwlist, print data for "first-gen" prospects for selected variables [output omitted]

```
#Without pipes
select(filter(wwlist, firstgen == "Y"), state, hs_city, sex)
#With pipes
wwlist %>% filter(firstgen == "Y") %>% select(state, hs_city, sex)
```

Comparing the two approaches:

- ▶ In the "without pipes" approach, code is written "inside out"
 - ▶ The first step in the task identifying the object is the innermost part of code
 - ▶ The last step in task selecting variables to print is the outermost part of code
- In "pipes" approach the left-to-right order of code matches how we think about the task
 - First, we start with an object **and then** (%>%) we use filter() to isolate first-gen students **and then** (%>%) we select which variables to print

Important: str() function helpful for understanding what object is piped in from one function to another

```
#object that was "piped" into `select()` from `filter()`
wwlist %>% filter(firstgen == "Y") %>% str()

#object that was created after `select()` function
wwlist %>% filter(firstgen == "Y") %>% select(state, hs_city, sex) %>% str()
```

Aside: count() function

count() function from dplyr package counts the number of obs by group

Syntax [see help file for full syntax]

count(x,...)

Arguments [see help file for full arguments]

- x: an object, often a data frame
- ...: variables to group by

Examples of using count()

▶ Without vars in ... argument, counts number of obs in object

```
count(wwlist)
wwlist %>% count()
```

- With vars in ... argument, counts number of obs per variable value
 - This is the best way to create frequency table, better than table()
 - ▶ note: by default, count() always shows NAs [this is good!]

```
count(wwlist,school_category)
wwlist %>% count(school_category)
```

pipe operators and new lines

Often want to insert line breaks to make long line of code more readable

▶ When inserting line breaks, pipe operator %>% should be the last thing before a line break, not the first thing after a line break

This works

```
wwlist %>% filter(firstgen == "Y") %>%
select(state, hs_city, sex) %>%
count(sex)
```

This works too

This doesn't work

The power of pipes

You might be thinking, "what's the big deal?"

TasK:

in one line of code, modify wwlist and create bar chart that counts number of prospects purchased by race/ethnicity, separately for in-state vs. out-of-state

```
wwlist %>% filter(is.na(state)==0) %>% # drop obs where variable state missing
 mutate( # create out-of-state indicator; create recoded ethnicity var
    out_state = as_factor(if_else(state != "WA", "out-of-state", "in-state")),
    ethn_race = recode(ethn_code,
      "american indian or alaska native" = "nativeam",
      "asian or native hawaiian or other pacific islander" = "api",
      "black or african american" = "black",
      "cuban" = "latinx".
      "mexican/mexican american" = "latinx",
      "not reported" = "not_reported",
      "other-2 or more" = "multirace",
      "other spanish/hispanic" = "latinx",
      "puerto rican" = "latinx",
      "white" = "white")) %>%
    group_by(out_state) %>% # group by "in-state" vs. "out-of-state"
    count(ethn_race) %>% # count of number of prospects purchased by race
    ggplot(aes(x=ethn race, y=n)) + # plot
    ylab("number of prospects") + xlab("race/ethnicity") +
    geom_col() + coord_flip() + facet_wrap(~ out_state)
```

The power of pipes

TasK:

in one line of code, modify wwlist and create bar chart of median income (in zip-code) of prospects purchased by race/ethnicity, separately for in-state vs. out-of-state

```
wwlist %>% filter(is.na(state)==0) %% # drop obs where variable state missing
 mutate( # create out-of-state indicator; create recoded ethnicity var
    out_state = as_factor(if_else(state != "WA", "out-of-state", "in-state")),
    ethn race = recode(ethn code,
      "american indian or alaska native" = "nativeam".
      "asian or native hawaiian or other pacific islander" = "api",
      "black or african american" = "black",
      "cuban" = "latinx".
      "mexican/mexican american" = "latinx",
      "not reported" = "not_reported",
      "other-2 or more" = "multirace",
      "other spanish/hispanic" = "latinx",
      "puerto rican" = "latinx",
      "white" = "white")) %>%
    group_by(out_state, ethn_race) %>% # group by "out-state" and ethnicity
    summarize(avg_inc_zip = mean(med_inc_zip, na.rm = TRUE)) %>% # calculate av
    ggplot(aes(x=out_state, y=avg_inc_zip)) +
    ylab("avg. income in zip code") + xlab("") +
    geom_col() + coord_flip() + facet_wrap(~ ethn_race) # plot
```

The power of pipes

Example R script from Ben Skinner, which creates analysis data for Skinner (2018)

Link to R script

Other relevant links

- ► Link to Github repository for Skinner (2018)
- Link to published paper
- Link to Skinner's Github page
 A lot of cool stuff here
- Link to Skinner's personal website
 - A lot of cool stuff here

Do task with and without pipes [STUDENTS WORK ON THEIR OWN]

Task:

▶ Count the number "first-generation" prospects from the state of Washington

Without pipes

With pipes

```
wwlist %>% filter(firstgen == "Y", state == "WA") %>% count()
#> # A tibble: 1 x 1
#> n
#> <int>
#> 1 32428
```

Do task with and without pipes [STUDENTS WORK ON THEIR OWN]

Task: frequency table of school_type for non first-gen prospects from WA

without pipes

```
wwlist_temp <- filter(wwlist, firstgen == "N", state == "WA")
table(wwlist_temp$school_type, useNA = "always")
#>
#> private public <NA>
#> 11 46146 12489
rm(wwlist_temp) # cuz we don't need after creating table
```

With pipes

Comparison of two approaches

- without pipes, task requires multiple lines of code (this is quite common)
 - irst line creates object; second line analyzes object
- with pipes, task can be completed in one line of code and you aren't left with objects you don't care about

Student exercises with pipes

- Using object wwlist select the following variables (state, firstgen, ethn_code) and assign <- them to object wwlist_temp. (ex. wwlist_temp <- wwlist)
- Using the object you just created wwlist_temp, create a frequency table of ethn_code for first-gen prospects from California.
- 3. **Bonus**: Try doing question 1 and 2 together. Use original object wwlist, but do not assign to a new object.

Once finished you can rm(wwlist_temp)

Solution to exercises with pipes

 Using object wwlist select the following variables (state, firstgen, ethn_code) and assign them to object wwlist_temp

```
wwlist_temp <- wwlist %>%
  select(state, firstgen, ethn_code)
```

Solution to exercises with pipes

Using the object you just created wwlist_temp, create a frequency table of ethn_code for first-gen prospects from California.

```
#names(wwlist)
wwlist_temp %>%
  filter(firstgen == "Y", state == "CA") %>% count(ethn code)
#> # A tibble: 10 x 2
#> ethn code
#> <chr>
                                                          \langle int \rangle
#> 1 american indian or alaska native
                                                             86
#> 2 asian or native hawaiian or other pacific islander
#> 3 black or african american
                                                             10
#> 4 cuban
#> 5 mexican/mexican american
                                                            643
#> 6 not reported
                                                            113
#> 7 other-2 or more
                                                           4197
#> 8 other spanish/hispanic
                                                            179
#> 9 puerto rican
#> 10 white
                                                           2933
```

Solution to exercises with pipes

3. Bonus: Try doing question 1 and 2 together.

```
wwlist %>%
  select(state, firstgen, ethn_code) %>%
  filter(firstgen == "Y", state == "CA") %>%
  count(ethn_code)
#> # A tibble: 10 x 2
#> ethn code
#> <ch.r>
                                                           \langle i, n, t, \rangle
#> 1 american indian or alaska native
#> 2 asian or native hawaiian or other pacific islander
                                                              86
#> 3 black or african american
                                                              10
#> 4 cuban
#> 5 mexican/mexican american
                                                             643
#> 6 not reported
                                                             113
#> 7 other-2 or more
                                                            4197
#> 8 other spanish/hispanic
                                                             179
#> 9 puerto rican
#> 10 white
                                                            2933
#rm(wwlist_temp)
rm(wwlist_temp)
```

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Creating variables using mutate (tidyverse approach)

Our plan for learning how to create new variables

Recall that dplyr package within tidyverse provide a set of functions that can be described as "verbs": subsetting, sorting, and transforming

What we've done	Where we're going
Subsetting data	Transforming data
- select() variables	- mutate() creates new variables
- filter() observations	- summarize() calculates across rows
Sorting data	- group_by() to calculate across rows within groups
- arrange()	

Today

we'll use mutate() to create new variables based on calculations across columns within a row

Next week

we'll combine mutate() with summarize() and group_by() to create variables based on calculations across rows

Create new data frame based on df_school_all

Data frame df_school_all has one obs per US high school and then variables identifying number of visits by particular universities

load(url("https://github.com/ozanj/rclass/raw/master/data/recruiting/recruit_sc names(df_school_all)

```
#> [1] "state_code"
                              "school type"
                                                   "ncessch"
#> [4] "name"
                              "address"
                                                   "citu"
#> [7] "zip code"
                              "pct white"
                                                   "pct black"
#> [10] "pct_hispanic"
                              "pct asian"
                                                   "pct amerindian"
#> [13] "pct other"
                              "num fr lunch"
                                                   "total students"
#> [16] "num_took_math"
                              "num_prof_math"
                                                   "num took rla"
#> [19] "num_prof_rla"
                              "avgmedian_inc_2564" "latitude"
#> [22] "longitude"
                              "visits by 196097"
                                                   "visits_by_186380"
                                                   "visits_by_181464"
#> [25] "visits_by_215293"
                              "visits_by_201885"
#> [28] "visits by 139959"
                              "visits by 218663"
                                                   "visits by 100751"
#> [31] "visits_by_199193"
                              "visits by 110635"
                                                   "visits_by_110653"
                                                   "visits_by_106397"
#> [34] "visits_by_126614"
                              "visits by 155317"
#> [37] "visits by 149222"
                              "visits_by_166629"
                                                   "total visits"
#> [40] "inst 196097"
                              "inst_186380"
                                                   "inst_215293"
#> [43] "inst 201885"
                              "inst 181464"
                                                   "inst 139959"
#> [46] "inst 218663"
                              "inst 100751"
                                                   "inst 199193"
#> [49] "inst_110635"
                              "inst 110653"
                                                   "inst 126614"
#> [52] "inst 155317"
                              "inst 106397"
                                                   "inst 149222"
#> [55] "inst 166629"
```

Create new data frame based on df_school_all

Create new version of data frame, called school_v2, which we'll use to introduce how to create new variables

```
school_v2 <- df_school_all %>%
  select(-contains("inst ")) %>% # remove vars that start with "inst "
 rename( # rename selected variables
   visits by berkeley = visits by 110635.
   visits by boulder = visits by 126614,
   visits by bama = visits by 100751.
   visits by stonybrook = visits by 196097,
   visits by rutgers = visits by 186380,
   visits_by_pitt = visits_by_215293,
   visits_by_cinci = visits_by_201885,
   visits_by_nebraska = visits_by_181464,
   visits by georgia = visits by 139959.
   visits by scarolina = visits by 218663,
   visits_by_ncstate = visits_by_199193,
   visits by irvine = visits by 110653,
   visits by kansas = visits by 155317,
   visits_by_arkansas = visits_by_106397,
   visits by sillinois = visits by 149222,
   visits_by_umass = visits_by_166629,
   num took read = num took rla.
   num prof read = num prof rla,
   med_inc = avgmedian_inc_2564
```

Introduce mutate() function

Introduce mutate() function

mutate() is tidyverse approach to creating variables (not Base R approach)

Description of mutate()

- reates new columns (variables) that are functions of existing columns
- ▶ After creating a new variable using mutate(), every row of data is retained
- mutate() works best with pipes %>%

Task:

 Using data frame school_v2 create new variable that measures the pct of students on free/reduced lunch (output omitted)

```
# create new dataset with fewer vars; not necessary to do this
school_sml <- school_v2 %>%
    select(ncessch, school_type, num_fr_lunch, total_students)

# create new var
school_sml %>%
    mutate(pct_fr_lunch = num_fr_lunch/total_students)

# remove data frame object
rm(school_sml)
```

Investigate mutate() syntax

Usage (i.e., syntax)

mutate(.data,...)

Arguments

- .data : a data frame
 - if using mutate() after pipe operator %>%, then this argument can be omitted
 - Why? Because data frame object to left of %>% "piped in" to first argument of mutate()
- ...: expressions used to create new variables
 - "Name-value pairs of expressions"
 - "The name of each argument will be the name of a new variable, and the value will be its corresponding value."
 - "Use a NULL value in mutate to drop a variable."
 - "New variables overwrite existing variables of the same name"

Value

returns a (data frame) object that contains the original input data frame and new variables that were created by mutate()

Can create variables using standard mathematical or logical operators $[{\sf output}\ {\sf omitted}]$

```
#glimpse(school_v2)
school_v2 %>%
select(state_code,school_type,ncessch,med_inc,num_fr_lunch,total_students,num
mutate( # each argument creates a new variable, name of argument is name of va
    one = 1,
    med_inc000 = med_inc/1000,
    pct_fr_lunch = num_fr_lunch/total_students*100,
    took_math_na = is.na(num_took_math)==1
) %>%
select(state_code,school_type,ncessch,one,med_inc,med_inc000,num_fr_lunch,tot
```

Can create variables using "helper functions" called within mutate() [output omitted]

- ▶ These are standalone functions can be called within mutate()
 - e.g., if_else(), recode(), case_when()
- will show examples of this in subsequent slides

```
school_v2 %>%
select(state_code,ncessch,name,school_type) %>%
mutate(public = if_else(school_type == "public", 1, 0))
```

Introduce mutate() function

New variable not retained unless we assign <- it to an object (existing or new)

```
mutate() without assignment
school_v2 %>% mutate(pct_fr_lunch = num_fr_lunch/total_students)
names(school_v2)
```

```
mutate() with assignment
school_v2_temp <- school_v2 %>%
mutate(pct_fr_lunch = num_fr_lunch/total_students)
names(school_v2_temp)
rm(school_v2_temp)
```

mutate() can create multiple variables at once

pct prof math= num prof math/num took math)

Student exercise using mutate()

- Using the object school_v2, select the following variables (num_prof_math, num_took_math, num_prof_read, num_took_read) and create a measure of percent proficient in math pct_prof_math and percent proficient in reading pct_prof_read.
- Now using the code for question 1, filter schools where at least 50% of students are proficient in math & reading.
- 3. Count the number of schools from question 2.
- 4. Using school_v2, using mutate() combined with is.na() create a dichotomous indicator variable med_inc_na that identifies whether med_inc is missing (NA) or not. And then use syntax count(var_name) to create frequency table of variable med_inc_na. How many observations are missing? [XIN YOU WILL NEED TO CREATE SOLUTION FOR THIS SLIDE]

Solutions for exercise using mutate()

Using the object school_v2, select the following variables (num_prof_math, num_took_math, num_prof_read, num_took_read) and create a measure of percent proficient in math pct_prof_math and percent proficient in reading pct_prof_read.

```
school v2 %>%
  select(num prof math, num took math, num prof read, num took read) %>%
 mutate(pct_prof_math = num_prof_math/num_took_math,
         pct_prof_read = num_prof_read/num_took_read)
#> # A tibble: 21.301 x 6
     num prof math num took math num prof read num took read pct prof math
#>
#>
              <db1>
                            <db1>
                                          <db1>
                                                        <dbl>
                                                                      <db1>
#>
              24.8
                              146
                                          25.0
                                                          147
                                                                      0.17
#>
              1.7
                               17
                                          1.7
                                                           17
                                                                      0.10
#>
              3.5
                                           3.5
                                                                      0.25
                               14
                                                           14
#>
               .3
                               30
                                           .3
                                                           30
                                                                      0.1
#>
              2.8
                               28
                                           2.8
                                                           28
                                                                      0.10
#>
              2.5
                               25
                                           2.4
                                                           24
                                                                      0.1
#>
              1.55
                               62
                                           1.55
                                                           62
                                                                      0.025
#>
               2.1
                               21
                                           2.2
                                                           22
                                                                      0.1
               2.3
                                           2.3
                                                                      0.10
#>
                               23
                                                           23
#>
  10
               1.9
                               19
                                           1.9
                                                           19
                                                                      0.10
#> # ... with 21,291 more rows, and 1 more variable: pct prof read <dbl>
```

Solutions for exercise using mutate()

2. Now using the code for question 1, filter schools where at least 50% of students are proficient in math & reading.

```
school v2 %>%
 select(num_prof_math, num_took_math, num_prof_read, num_took_read) %>%
 mutate(pct_prof_math = num_prof_math/num_took_math,
        pct_prof_read = num_prof_read/num_took_read) %>%
 filter(pct_prof_math >= 0.5 & pct_prof_read >= 0.5)
#> # A tibble: 7,760 x 6
#>
     num prof math num took math num prof read num took read pct prof math
            <d.b 1.>
                         <d.b 1.>
                                      <d.b1.>
                                                   <d.b1.>
                                                                <db1>
#>
#> 1
            135.
                           260
                                      149.
                                                     261
                                                                0.520
#> 2
            299.
                           475
                                                     475
                                                                0.63
                                      418
#> 3
           213.
                           410
                                      332.
                                                     410
                                                                0.52
           54.6
#>
                          105
                                      96.6
                                                   105
                                                                0.52
#>
           111.
                          121
                                      118.
                                                    121
                                                                0.92
#> 6
           1057.
                                     1477.
                                                   2204
                                                                0.530
                         1994
#> 7
            100.
                          103
                                      125.
                                                    128
                                                                0.975
#> 8
             56.4
                                                                0.570
                           99
                                      84.4
                                                     148
#>
            445.
                          586
                                      392.
                                                     594
                                                                0.76
             56.0
                           59
                                      53.1
#> 10
                                                      61
                                                                0.95
#> # ... with 7,750 more rows, and 1 more variable: pct prof read <dbl>
```

Solutions for exercise using mutate()

3. Count the number of schools from question 2.

Solutions for exercise using mutate()

4. Using school_v2, using mutate() combined with is.na() create a dichotomous indicator variable med_inc_na that identifies whether med_inc is missing (NA) or not. And then use syntax count(var_name) to create frequency table of variable med_inc_na. How many observations are missing? [XIN - YOU WILL NEED TO CREATE SOLUTION FOR THIS SLIDE]

XIN - PLEASE EDIT/MODIFY THIS SLIDE AS NECESSARY

Using ifelse() function within mutate()

Using ifelse() function within mutate()

Description

▶ if logical condition TRUE, assign a value; if logical condition FALSE assign a value

Usage (i.e., syntax)

if_else(logical condition, true, false, missing = NULL)

Arguments

- ▶ logical condition: a condition that evaluates to TRUE or FALSE
- true: value to assign if condition TRUE
- ▶ false : value to assign if condition FALSE
- missing: value to assign to rows that have value NA for condition
 - default is missing = NULL; means that if condition is NA, then new_var == NA
 - ▶ But can assign different values to NA s, e.g., missing = -9

Value

- "Where condition is TRUE, the matching value from true, where it's FALSE, the matching value from false, otherwise NA."
- ▶ Unless otherwise specified, NA s in "input" var(s) assigned NA in "output var"

 $\textbf{Example} \colon \mathsf{Create} \ 0/1 \ \mathsf{indicator} \ \mathsf{of} \ \mathsf{whether} \ \mathsf{got} \ \mathsf{at} \ \mathsf{least} \ \mathsf{one} \ \mathsf{visit} \ \mathsf{from} \ \mathsf{Berkeley}$

```
school_v2 %>%
mutate(got_visit_berkeley = ifelse(visits_by_berkeley>0,1,0)) %>%
count(got_visit_berkeley)
```

ifelse() within mutate() to create 0/1 indicator variables

We often create dichotomous (0/1) indicator variables of whether something happened (or whether something is TRUE)

- Variables that are of substantive interest to project
 - e.g., did student graduate from college
- Variables that help you investigate data, check quality
 - e.g., indicator of whether an observation is missing/non-missing for a particular variable

Using ifelse() within mutate()

Task

Create 0/1 indicator if school has median income greater than \$100,000

Usually a good idea to investigate "input" variables **before** creating analysis vars str(school v2\$med_inc) # investigate variable type

```
school_v2%med_inc) # investigate variable type
school_v2 %>% count(med_inc) # frequency count, but this isn't very helpful
school_v2 %>% filter(is.na(med_inc)) %>% count(med_inc)
# shows number of obs w/ missing med_inc
```

Create variable

Using ifelse() within mutate()

XIN - WHY ISN'T THIS WORKING? ALSO, CAN YOU INVESTIGATE HOW I CAN MODIFY CODE SUCH THAT OBS WHERE CONDITION IS MISSING HAVE A VALUE OF (JUST FOR EXAMPLE) -9 IN THE NEW VARIABLE?

manually write out the default value for missing

```
school_v2 %>% select(med_inc) %>%
mutate(inc_gt_100k= ifelse(med_inc>100000,1,0, missing = NULL)) %>%
count(inc_gt_100k) # note how NA values of med_inc treated

school_v2 %>% select(med_inc) %>%
mutate(inc_gt_100k= ifelse(med_inc>100000,1,0, NA_integer_)) %>%
count(inc_gt_100k) # note how NA values of med_inc treated
```

OWN EXPERIMENTATION W/ IF_ELSE. WORKS HERE [ALTHOUGH IT IS SENSITIVE]

```
x <- c(-5:5, NA)
x
#> [1] -5 -4 -3 -2 -1 0 1 2 3 4 5 NA
if_else(x < 0, -x, x)
#> [1] 5 4 3 2 1 0 1 2 3 4 5 NA
if_else(x < 0, "negative", "positive", "missing")
#> [1] "negative" "negative" "negative" "negative" "negative" "positive"
#> [7] "positive" "positive" "positive" "positive" "positive" "missing"
```

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Using ifelse() function within mutate()

Task

- Create 0/1 indicator variable nonmiss_math which indicates whether school has non-missing values for the variable num_took_math
 - note: num_took_math refers to number of students at school that took state math proficiency test

Usually a good to investigate "input" variables before creating analysis vars

```
school_v2 %>% count(num_took_math) # this isn't very helpful
school_v2 %>% filter(is.na(num_took_math)) %>% count(num_took_math) # shows num
```

Create variable

Student exercises ifelse()

- Using the object school_v2, create 0/1 indicator variable in_state_berkeley
 that equals 1 if the high school is in the same state as UC Berkeley (i.e.,
 state_code=="CA").
- Create 0/1 indicator berkeley_and_irvine of whether a school got at least one visit from UC Berkeley AND from UC Irvine.
- Create 0/1 indicator berkeley_or_irvine of whether a school got at least one visit from UC Berkeley OR from UC Irvine.

Exercise ifelse() solutions

count(in_state_berkeley)

that equals 1 if the high school is in the same state as UC Berkeley (i.e.,
 state_code=="CA").
str(school_v2\$state_code) # investigate input variable
school_v2 %>% filter(is.na(state_code)) %>% count() # investigate input var
#Create var
school_v2 %>% mutate(in_state_berkeley=ifelse(state_code=="CA",1,0)) %>%

1. Using the object school_v2, create 0/1 indicator variable in_state_berkeley

Exercise ifelse() solutions

 Create 0/1 indicator berkeley_and_irvine of whether a school got at least one visit from UC Berkeley AND from UC Irvine.

```
#investigate input vars
school_v2 %>% select(visits_by_berkeley, visits_by_irvine) %>% str()
school_v2 %>% filter(is.na(visits_by_berkeley)) %>% count()
school_v2 %>% filter(is.na(visits_by_irvine)) %>% count()

#create variable
school_v2 %>%
mutate(berkeley_and_irvine=ifelse(visits_by_berkeley>0
    & visits_by_irvine>0,1,0)) %>%
count(berkeley_and_irvine)
```

Exercise ifelse() solutions

Create 0/1 indicator berkeley_or_irvine of whether a school got at least one visit from UC Berkeley OR from UC Irvine.

```
school_v2 %>%
mutate(berkeley_or_irvine=ifelse(visits_by_berkeley>0 | visits_by_irvine>0,1,
count(berkeley_or_irvine)
```

Using recode() function within mutate()

Using recode() function within mutate()

Description: Recode values of a variable

```
Usage (i.e., syntax)
```

```
recode(.x, ..., .default = NULL, .missing = NULL)
```

Arguments [see help file for further details]

- x A vector (e.g., variable) to modify
- Specifications for recode, of form current_value = new_recoded_value
- .default : If supplied, all values not otherwise matched given this value.
- .missing: If supplied, any missing values in .x replaced by this value.

```
str(wwlist\$school_type)
wwlist %>% count(school_type)

wwlist_temp <- wwlist %>% select(school_type) %>%
    mutate(public_school = recode(school_type,"public" = 1, "private" = 0))

wwlist_temp %>% head(n=10)
str(wwlist_temp\$public_school) # note: numeric variable
wwlist_temp %>% count(public_school) # note the NAs
rm(wwlist_temp)
```

Using recode() function within mutate()

Recoding school_type could have been accomplished using if_else()

▶ Use recode() when new variable has more than two categories

Task: Create school_catv2 based on school_category with these categories:

```
"regular"; "alternative"; "special"; "vocational"
```

Investigate input var

```
str(wwlist$school_category) # character variable
wwlist %>% count(school_category)
```

Recode

```
wwlist_temp <- wwlist %>% select(school_category) %>%
mutate(school_catv2 = recode(school_category,
    "Alternative Education School" = "alternative",
    "Alternative/other" = "alternative",
    "Regular elementary or secondary" = "regular",
    "Regular School" = "regular",
    "Special Education School" = "special",
    "Special program emphasis" = "special",
    "Vocational Education School" = "vocational")
)
str(wwlist_temp$school_catv2) # character variable created
wwlist_temp %>% count(school_catv2)
rm(wwlist_temp)
```

Using recode() within mutate()

Task: Create school_catv2 based on school_category with these categories:

- "regular"; "alternative"; "special"; "vocational"
- ▶ This time use the .missing argument to recode NAs to "unknown"

```
wwlist temp <- wwlist %>% select(school category) %>%
 mutate(school_catv2 = recode(school_category,
    "Alternative Education School" = "alternative",
    "Alternative/other" = "alternative",
    "Regular elementary or secondary" = "regular",
   "Regular School" = "regular",
   "Special Education School" = "special",
    "Special program emphasis" = "special",
    "Vocational Education School" = "vocational",
    .missing = "unknown")
str(wwlist temp$school catv2)
wwlist_temp %>% count(school_catv2)
wwlist %>% count(school_category)
rm(wwlist temp)
```

Using recode() within mutate()

Task: Create school_catv2 based on school_category with these categories:

- "regular"; "alternative"; "special"; "vocational"
- ▶ This time use the .default argument to assign the value "regular"

```
wwlist_temp <- wwlist %>% select(school_category) %>%
mutate(school_catv2 = recode(school_category,
    "Alternative Education School" = "alternative",
    "Alternative/other" = "alternative",
    "Special Education School" = "special",
    "Special program emphasis" = "special",
    "Vocational Education School" = "vocational",
    .default = "regular")
)
str(wwlist_temp$school_catv2)
wwlist_temp %>% count(school_catv2)
wwlist_temp %>% count(school_category)
rm(wwlist_temp)
```

Using recode() within mutate()

Task: Create school_catv2 based on school_category with these categories:

```
This time create a numeric variable rather than character.
     1 for "regular": 2 for "alternative": 3 for "special": 4 for "vocational"
wwlist_temp <- wwlist %>% select(school_category) %>%
  mutate(school catv2 = recode(school category,
    "Alternative Education School" = 2.
    "Alternative/other" = 2,
    "Regular elementary or secondary" = 1,
    "Regular School" = 1,
    "Special Education School" = 3,
    "Special program emphasis" = 3,
    "Vocational Education School" = 4)
str(wwlist_temp$school_catv2) # note: numeric variable now
wwlist_temp %>% count(school_catv2)
wwlist %>% count(school category)
rm(wwlist_temp)
```

Student exercise using recode() within mutate()

load(url("https://github.com/ozanj/rclass/raw/master/data/recruiting/recruit_ev
names(df_event)

- Using object df_event, assign new object df_event_temp and a numeric variable create event_typev2 based on event_type with these categories:
 - 1 for "2yr college"; 2 for "4yr college"; 3 for "other"; 4 for "private hs"; 5 for "public hs"
- 2. This time use the .default argument to assign the value 5 for "public hs"

Exercise using recode() within mutate() solutions

Check input variable

```
names(df_event)
str(df_event$event_type)
df_event %% count(event_type)
```

Exercise using recode() within mutate() solutions

- Using object df_event, assign new object df_event_temp and create a numeric variable event_typev2 based on event_type with these categories:
 - ▶ 1 for "2yr college"; 2 for "4yr college"; 3 for "other"; 4 for "private hs"; 5 for "public hs"

Exercise using recode() within mutate() solutions

This time assign the value use the .default argument to assign the value 5 for "public hs"

```
df_event_temp <- df_event %>% select(event_type) %>%
  mutate(event_typev2 = recode(event_type,
    "2yr college" = 1,
    "4yr college" = 2,
    "other" = 3,
    "private hs" = 4,
    .default = 5)
  )
  str(df_event_temp$event_typev2)
  df_event_temp %>% count(event_typev2)
  df_event %>% count(event_type)
```

Using case_when() function within mutate()

Using case_when() function within mutate()

case_when()
useful for creating variable that is a function of multiple "input"
variables

Usage (i.e., syntax): case_when(...)

Arguments [from help file; see help file for more details]

- ▶ ...: A sequence of two-sided formulas.
 - ▶ The left hand side (LHS) determines which values match this case.
 - LHS must evaluate to a logical vector.
 - ▶ The right hand side (RHS) provides the replacement value.

Example task: Using data frame wwlist and input vars state and firstgen, create a 4-category var with following categories:

"instate_firstgen"; "instate_nonfirstgen"; "outstate_firstgen"; "outstate_nonfirstgen"

```
wwlist_temp <- wwlist %>% select(state,firstgen) %>%
mutate(state_gen = case_when(
   state == "WA" & firstgen =="Y" ~ "instate_firstgen",
   state == "WA" & firstgen =="N" ~ "instate_nonfirstgen",
   state != "WA" & firstgen =="Y" ~ "outstate_firstgen",
   state != "WA" & firstgen =="N" ~ "outstate_nonfirstgen")
)
str(wwlist_temp$state_gen)
wwlist_temp %>% count(state_gen)
```

Using case_when() function within mutate()

Task: Using data frame wwlist and input vars state and firstgen, create a 4-category var

Let's take a closer look at how values of inputs are coded into values of outputs

```
wwlist %>% select(state,firstgen) %>% str()
count(wwlist,state)
count(wwlist,firstgen)
```

Create variable

```
wwlist_temp <- wwlist %>% select(state,firstgen) %>%
mutate(state_gen = case_when(
   state == "WA" & firstgen =="Y" ~ "instate_firstgen",
   state == "WA" & firstgen =="N" ~ "instate_nonfirstgen",
   state != "WA" & firstgen =="Y" ~ "outstate_firstgen",
   state != "WA" & firstgen =="N" ~ "outstate_nonfirstgen")
)
```

Compare values of input vars to value of output var

```
wwlist_temp %>% count(state_gen)
wwlist_temp %>% filter(is.na(state)) %>% count(state_gen)
wwlist_temp %>% filter(is.na(firstgen)) %>% count(state_gen)
```

Take-away: by default var created by <code>case_when()</code> equals NA for obs where one of the inputs equals NA

Student exercise using case_when() within mutate()

- Using the object school_v2 and input vars school_type , and state_code , create a 4-category var state_type with following categories:
 - "instate_public"; "instate_private"; "outstate_public"; "outstate_private"
 - Note: We are referring to CA as in-state for this example

Exercise using case_when() within mutate() solution

Investigate

```
school_v2 %>% select(state_code,school_type) %>% str()
count(school_v2,state_code)
school_v2 %>% filter(is.na(state_code)) %>% count()

count(school_v2,school_type)
school_v2 %>% filter(is.na(school_type)) %>% count()
```

Exercise using case_when() within mutate() solution

 Using the object school_v2 and input vars school_type , and state_code , create a 4-category var state_type with following categories:

```
"instate_public"; "instate_private"; "outstate_public"; "outstate_private"
school_v2_temp <- school_v2 %>% select(state_code,school_type) %>%
 mutate(state_type = case_when(
    state_code == "CA" & school_type == "public" ~ "instate_public",
    state_code == "CA" & school_type == "private" ~ "instate_private",
    state_code != "CA" & school_type == "public" ~ "outstate_public",
    state_code != "CA" & school_type == "private" ~ "outstate_private")
school_v2_temp %>% count(state_type)
#> # A tibble: 4 x 2
#> state_type
                        n.
#> <chr> <int>
#> 1 instate_private 366
#> 2 instate public 1404
#> 3 outstate_private 3456
#> 4 outstate public 16075
#school v2 temp %>% filter(is.na(state code)) %>% count(state type) #no missing
#school_v2_temp %>% filter(is.na(school_type)) %>% count(state_type) #no missing
```

Create new variables using assignment operator <- and subsetting operators [] and \$ to create new variables and set conditions of the input variables

Pseudo syntax: df\$newvar <- ...

- where ... argument is expression(s)/calculation(s) used to create new variables
 expressions can include subsetting operators and/or other base R functions
- Task: Create measure of percent of students on free-reduced lunch

base R approach

```
school_v2_temp<- school_v2 #create copy of dataset; not necessary
school_v2_temp$pct_fr_lunch <-
    school_v2_temp$num_fr_lunch/school_v2_temp$total_students

#investigate variable you created
str(school_v2_temp$pct_fr_lunch)
#> num [1:21301] 0.723 1 0.967 0.93 1 ...
school_v2_temp$pct_fr_lunch[1:5] # print first 5 obs
#> [1] 0.7225549 1.0000000 0.9666667 0.9303483 1.0000000
```

tidyverse approach (with pipes)

```
school_v2_temp <- school_v2 %>%
mutate(pct_fr_lunch = num_fr_lunch/total_students)
```

If creating new variable based on the condition/values of input variables, basically the tidyverse equivalent of mutate() with ifelse() or recode()

- ▶ Pseudo syntax: df\$newvar[logical condition]<- new value
- logical condition: a condition that evaluates to TRUE or FALSE

Task: Create 0/1 indicator if school has median income greater than \$100k

tidyverse approach (using pipes)

Base R approach

Task: Using data frame wwlist and input vars state and firstgen, create a 4-category var with following categories:

"instate_firstgen"; "instate_nonfirstgen"; "outstate_firstgen"; "outstate_nonfirstgen"

tidyverse approach (using pipes)

```
wwlist_temp <- wwlist %>%
 mutate(state_gen = case_when(
    state == "WA" & firstgen == "Y" ~ "instate_firstgen",
    state == "WA" & firstgen =="N" ~ "instate_nonfirstgen",
    state != "WA" & firstgen == "Y" ~ "outstate_firstgen",
    state != "WA" & firstgen =="N" ~ "outstate_nonfirstgen")
str(wwlist temp$state gen)
#> chr [1:268396] NA "instate nonfirstgen" "instate nonfirstgen" ...
wwlist temp %>% count(state gen)
#> # A tibble: 5 x 2
#> state gen
#> <chr>
                         \langle int \rangle
#> 1 instate firstgen 32428
#> 2 instate nonfirstgen 58646
#> 3 outstate firstgen 32606
#> 4 outstate nonfirstgen 134616
#> 5 <NA>
                          10100
```

Task: Using wwlist and input vars state and firstgen, create a 4-category var

base R approach

```
wwlist temp <- wwlist
wwlist_temp$state_gen <- NA
wwlist_temp$state_gen[wwlist_temp$state == "WA"
 & wwlist_temp$firstgen =="Y"] <- "instate_firstgen"
wwlist_temp$state_gen[wwlist_temp$state == "WA"
 & wwlist_temp$firstgen =="N"] <- "instate_nonfirstgen"</pre>
wwlist_temp$state_gen[wwlist_temp$state != "WA"
 & wwlist_temp$firstgen =="Y"] <- "outstate_firstgen"
wwlist temp$state gen[wwlist temp$state != "WA"
 & wwlist_temp$firstgen =="N"] <- "outstate nonfirstgen"
str(wwlist_temp$state_gen)
#> chr [1:268396] NA "instate nonfirstgen" "instate nonfirstgen" ...
count(wwlist_temp, state_gen)
#> # A tibble: 5 x 2
#> state gen
#> <chr>
                          \langle int \rangle
#> 1 instate firstgen 32428
#> 2 instate nonfirstgen 58646
#> 3 outstate_firstgen 32606
#> 4 outstate nonfirstgen 134616
#> 5 <NA>
                           10100
```