

Linear Regression in R and Stata

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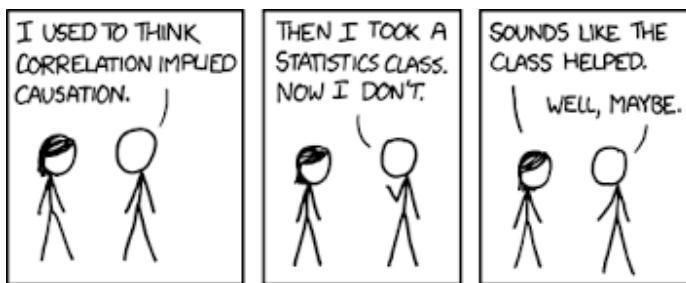
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Chapter 1

Introduction



Welcome to your guide to learning linear regression in Stata and R. This website houses all the information you need learn the basics of coding linear regression in Stata and R. It will not contain all the information taught in class, but will allow you to bridge that knowledge into running linear regressions on your own.

1.1 Labs

This is a 10-week course with 9 labs. Each lab will focus on some topic related to coding linear regression. By the end of the course, you should be able to run a linear regression project from start to finish with reproducible code. Each lab will contain links to download script files (in .do or .r format), overviews of key concepts, and application questions.

Lab Topics

- Lab 1: Data cleaning review & code annotation
- Lab 2: Running a basic linear regression

- Lab 3: Testing the assumptions of linear regression
- Lab 4: Transforming variables & displaying results
- Lab 5: Exporting tables & reproducible code
- Lab 6: Evaluating linearity
- Lab 7: Review & requested topics TBD
- Lab 8: Robust standard errors & multicollinearity
- Lab 9: Comparing models & running a project from start to finish

1.2 Finding Data

1.3 Render book

You can render the HTML version of this example book without changing anything:

1. Find the **Build** pane in the RStudio IDE, and
2. Click on **Build Book**, then select your output format, or select “All formats” if you’d like to use multiple formats from the same book source files.

Or build the book from the R console: `{r, eval=FALSE} bookdown::render_book()`

To render this example to PDF as a `bookdown::pdf_book`, you’ll need to install XeLaTeX. You are recommended to install TinyTeX (which includes XeLaTeX): <https://yihui.org/tinytex/>.

1.4 Preview book

As you work, you may start a local server to live preview this HTML book. This preview will update as you edit the book when you save individual .Rmd files. You can start the server in a work session by using the RStudio add-in “Preview book”, or from the R console: `{r eval=FALSE} bookdown::serve_book()`

Chapter 2

Lab 1 (Stata)

2.1 Lab Goals & Instructions

- Review the basics of data cleaning
- Learn the importance of annotating code
- Start develop your own coding style

Instructions

1. Download the data file (`SOC401_W21_Billionaires.dta`) and `.do` script (`401-1-Lab1.do`) from the links below.
2. Create a file structure following the instructions in 2.3 below
3. Work through the `.do` script, executing each line of code. This page contains the same material, with more explanation about the functions used.
4. Read through the Importance of Annotation and Clean Code, and complete the short activity at the bottom of the page. Email the `.do` script file to me by class on Monday.

Jump Links to Commands in this Lab:

`cd` (set working directory)
`use` (load stata files)
`import delimited` (load `.csv`)
`describe`
`mdesc` for missing data
`summarize`
`tabulate`
`generate` recode
`replace`
`histogram`
`graph box` (box plot)

graph bar (bar plot)
keep
drop
save
export delimited

2.2 Lab Files

2.3 Create a File Structure

Life can get messy and so can data analysis. Creating a file structure is the equivalent of keeping a clean work space. You may not mind a messy desk, but a messy file structure will be a nightmare for your collaborators and increase your risk of making mistakes in your analysis. With quantitative data analysis, file management is crucial. I am going to suggest a file structure that you follow in this class. It will ensure that the relative pathways I include in lab script files will run.

For your first task, create the following file structure for this class.

1. Decide where on your computer you'd like to store class files. Create a new folder in that spot titled anything you like. Example: 401_Linear_Regression. DO NOT include spaces in your folder title.
2. Create the following sub-folders in your main folder:
 - data_raw
 - data_work
 - scripts
 - figs_output
3. Move SOC401_W21_Billionaires.dta to your data_raw folder.
4. Move 401-1-Lab1.do to your scripts folder.

When you begin labs, you should move all raw data files and script files to the appropriate locations.



Data Tip

Why do I need two separate folders for data?

You should always store your original, raw data files in a place where they are in no danger of being saved over, altered, or lost. One great way of protecting your original data files is to create two folders for data: one folder for your raw files and one folder where you can save cleaned datasets and subsets.

2.4 Data Cleaning

95 percent of the work of quantitative research is getting your data in shape to run your model. This tutorial assumes that you opened Stata and run a few commands before. If you have not used Stata before, here are some resources to help you get started coding in R.

- Stata Tutorial from Princeton: A great overview of Stata basics
- Stata Tutorial from University of South Australia
- Stata Commands Cheat Sheet

Northwestern's Research Computing Services offers great trainings in a variety of software languages. They do not have regular trainings in Stata, but you can set up individual meetings to help work through problems in your code. Check them out and get on their email list.

Set up the environment

Working Directory

Before you get to work cleaning your data, you need to let the software know where to grab and save your files. This saves you from having to type in a long file path anytime you want to do something. You must begin any Stata .do file by setting your working directory. Your working directory is the folder on your computer where you want to store all your data and script files. Below you will see the path to my working directory. You should replace the filepath with the one you want to use.

```
cd "/Users/srwerth/Documents/Work_Research/Regression_Labs"
```

Do File Set-up

Now that you've set your working directory, you can tell Stata to go grab your data and load it into your working environment. There are a couple lines of code you want to put at the beginning of your .do file to keep your code running smoothly.

- **clear all:** Clears the stata environment before you run your code.
- **capture log close:** If there's a previous log set up, this code closes it.
- **log using Lab1.scl, replace:** This creates a new log file, which is a file that tracks all the code you run in the session. This is important for reviewing your analysis after the fact. Rename the file whatever you like for each lab.
- **version 17:** This command Stata what version of the software you wrote this .do file in, in case you are running it in a different version later. Sometimes commands can change between versions. This prevents any inconsistencies between versions from causing errors.

```
clear all
capture log close
log using Lab1.smcl, replace
version 17
```

2.4.1 Load your data

Now you are ready to load your data. Loading data that is in Stata's data formats is easy. An Stata data file ends in .dta. Note how I get to use a relative path, just telling Stata to look in the `data_raw` folder, and then the dataset name.

```
use "data_raw/SOC401_W21_Billionaires.dta"
```

You can also load data in other formats. A CSV file is one of the most common data formats.

```
import delimited "data_raw/SOC401_W21_Billionaires.csv"
```

Check out this tutorial on how to load excel data: <https://www.stata.com/manuals/dimportexcel.pdf>

Exploring your data

When you begin any new project, it is important to understand the condition of your variables. Here are a few important functions you need to begin that process.



Data Tip

Remember if this script or any other uses a command that you are not familiar with, you can search for the function online or type 'help' and then the name of the function you want to look up in the command line. For example, 'help describe' will pull up the documentation for that command.

Let's start by taking a global look at your dataset.

The `describe` function provides an overview of your dataset. The output includes the number of observations, variables, and a description of each variable in the dataset. The description includes the format and any labels already attached to each variable.

`describe`

Contains data from data_raw/SOC401_W21_Billionaires.dta

Observations: 2,614

Variables: 21

9 Jan 2021 15:56

Variable name	Storage type	Display format	Value label	Variable label
name	str45	%45s		
rank	int	%8.0g		
year	int	%8.0g		
companyfounded	int	%8.0g		company.founded
companyname	str59	%59s		company.name
demographicsage	byte	%8.0g		demographics.age
locationgdp	double	%10.0g		location.gdp
wealthworthin~s	float	%9.0g		wealth.worth in billions
wealthhowfrom~g	str4	%9s		wealth.how.from emerging
wealthhowwasf~r	str4	%9s		wealth.how.was founder
wealthhowwaspl~1	str4	%9s		wealth.how.was political
wealthhowinhe~2	long	%24.0g	wealthhowinherited2	wealth.how.inherited
wealthhowcate~2	long	%18.0g	wealthhowcategory2	wealth.how.category
wealthtype2	long	%24.0g	wealthtype2	wealth.type
wealthhowindu~2	long	%31.0g	wealthhowindustry2	wealth.how.industry
locationregion2	long	%24.0g	locationregion2	location.region
locationcount~2	long	%8.0g	locationcountrycode2	location.country code
locationcitiz~2	long	%20.0g	locationcitizenship2	location.citizenship
demographicsg~2	long	%14.0g	demographicsgender2	demographics.gender
companysector2	long	%52.0g	companysector2	company.sector
companyrelati~2	long	%46.0g	companyrelationship2	company.relationship

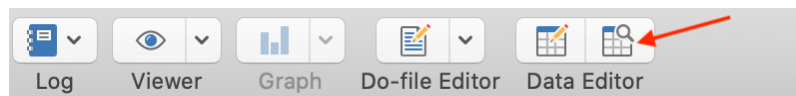
Sorted by:

You can also look at a specific variable you want to learn more about

```
describe demographicsgender2
```

Variable name	Storage type	Display format	Value label	Variable label
demographicsg~2	long	%14.0g	demographicsgender2	demographics.gender

If you want to look at your data set in a spreadsheet-type format you can look at the Data Editor in browse mode. You can open the Data Editor by clicking on the icon below on the top bar. Make sure you click on the icon with the magnifying glass (browse mode), not the pencil (edit mode). You do not want to accidentally edit your data.



Look at missing observations in your dataset

To look at missing values for each variable in your data set we need to download a new function into Stata. The `mdesc` function makes looking at missing values easy. To install a Stata program you can run `search mdesc` in the command line and click the link in the program information to install the program ()

```
ssc install mdesc
```

Now you are ready to look at the missing values in your dataset

```
mdesc
```

Variable	Missing	Total	Percent Missing
name	0	2,614	0.00
rank	0	2,614	0.00
year	0	2,614	0.00
companyfou~d	0	2,614	0.00
companyname	38	2,614	1.45
demographi~e	0	2,614	0.00
locationgdp	0	2,614	0.00
wealthwort~s	0	2,614	0.00
wealthhowf~g	0	2,614	0.00
wealthhoww~r	0	2,614	0.00
wealthhoww~l	0	2,614	0.00
wealthhow~d2	0	2,614	0.00
wealthhowc~2	1	2,614	0.04
wealthtype2	22	2,614	0.84

```

wealthh~try2 |          1          2,614          0.04
locationre~2 |          0          2,614          0.00
locationco~2 |          0          2,614          0.00
locationci~2 |          0          2,614          0.00
demographi~2 |         34          2,614          1.30
companysec~2 |         23          2,614          0.88
companyrel~2 |         46          2,614          1.76
-----+-----

```

Or you can look at missing values for a specific variable

```
mdesc companyname
```

```

Variable |      Missing      Total      Percent Missing
-----+-----
companyname |           38      2,614           1.45
-----+-----

```

Descriptive statistics for continous variables using `summarize`

You can generate simple descriptive statistics (mean, standard deviation, range, etc.) with the `summarize` command. Looking at descriptive statistics is not only helpful to get a sense of your data, they can also be helpful checks as you work on cleaning a dataset.

```
summarize demographicsage
```

```

Variable |      Obs      Mean      Std. dev.      Min      Max
-----+-----
demographi~e |    2,614    53.34124    25.33332      -42      98

```

If you add `, detail` to the command you can see additional descriptive statistics, including skew, variance and quartiles.

```
summarize demographicsage, detail
```

```

                                demographics.age
-----+-----
Percentiles      Smallest
1%              0        -42
5%              0         -7
10%             0         0   Obs              2,614
25%            47         0   Sum of wgt.       2,614

50%            59
                                Mean              53.34124
                                Std. dev.         25.33332
                                Largest
75%            70          95
90%            79          96   Variance         641.7771

```

95%	84	96	Skewness	-1.104472
99%	90	98	Kurtosis	3.330685

Frequency tables for categorical variables using `tabulate`

`Tabulate` produces a frequency table showing how many observations there are for each value.

```
tabulate demographicsgender2
```

demographics.g ender	Freq.	Percent	Cum.
female	249	9.65	9.65
male	2,328	90.23	99.88
married couple	3	0.12	100.00
Total	2,580	100.00	

If you add `, nolabel` it shows you the values without their label. This is how the values appear in the actual data, which is important to know when you have to recode your data. With this example, you can see that female is coded as 1, male is coded as 2, and married couple is coded as 3.

```
tabulate demographicsgender2, nolabel
```

demographic s.gender	Freq.	Percent	Cum.
1	249	9.65	9.65
2	2,328	90.23	99.88
3	3	0.12	100.00
Total	2,580	100.00	

If you add `, missing` it will add a row to the table showing the number of missing values for that variable.

```
tabulate demographicsgender2, missing
```

demographics.g ender	Freq.	Percent	Cum.
female	249	9.53	9.53
male	2,328	89.06	98.58
married couple	3	0.11	98.70
.	34	1.30	100.00

```
Total |      2,614      100.00
```

Note: you can also shorten `tabulate` to `tab` and the function will run the same.

Cleaning variables

In the previous section, we learn the code to check the state of a variable when we first open the dataset. Most of the time, you're likely to find that the variable isn't ideal to work with. It is important to use this commands to make a variable ready for your use.

Let's take a closer look at the variable for gender again:

```
tabulate demographicsgender2
```

```
demographics.g |
      ender |      Freq.      Percent      Cum.
-----+-----
      female |         249         9.65         9.65
      male |       2,328        90.23        99.88
married couple |          3         0.12       100.00
-----+-----
      Total |       2,580       100.00
```

I notice a few things you will want to change about that variable:

- The variable name is tedious to type
- We want this to be a dummy variable where 1 is female and 0 is not female (in this binary, male).
- We have three married couples in our data set coded as 3

Let's create a new variable with a better name and recode it how you'd like it.

generate to create new variables

If you want to label the 3 married couples as 0, aka not female, take the following steps. First let's generate a new variable `female` with the same values as `demographicsgender2`. We'll also go ahead and label that variable "Female".

```
gen female = demographicsgender2
label variable female "Female (recoded)"
```

The command is `label variable`, the variable you are labeling is `female`, and the label is "Female".

recode to transform the values of a variable

Now let's take our new variable and recode the values so that 0 means "Not Female" and 1 means "Female". In this example, we're taking all the married couples and labeling them as 0. In this code you are telling Stata to recode the variable `female` so that a 3 becomes a 0, a 2 becomes a 0 and a 1 stays a 1.

```
recode female (3 = 0) (2 = 0) (1 = 1)
```

You should also at this point apply a label to these new values, so your tables and graphs will be easier to read. This is a two step process. First you create an object that stores the labels you want to apply to each value. `label define` is the command and `gender` is the name of the object you are creating.

```
label define gender 0 "Not Female" 1 "Female"
```

Second, you apply that label object to the variable. `label values` is the command, `female` is the name of the variable you want to label, and `gender` is the label object you want to apply to it.

```
label values female gender
```

Let's run a crosstab table to make sure that everything came out right. Looks like everything landed where it is supposed to.

```
tab female demographicsgender2
```

Female (recoded)	demographics.gender			Total
	female	male	married c	
Not Female	0	2,328	3	2,331
Female	249	0	0	249
Total	249	2,328	3	2,580

replace to transform the values of a variable

There's another way to recode variables. Both options work just as well, so it is truly your preference which one you want to use. We'll practice using the `replace` command by recoding our gender variable a different way. Let's make a new variable so 0 only refers to "Male" and 1 only refers to "Female". You will recode the married couples to missing.

First, you will generate a new variable, `female2`. In this instance we set all the values of the new variable to missing. We'll also label it.

```
gen female2 = .  
label variable female2 "Female (Male/Female)"
```


Now let's recode our values using the replace command. This command replaces the values of your variable, based on the values of another variable. Here you are telling Stata to replace the value of `female2` if `demographicsgender2` is equal to 2. On the second line you make the value of `female2` 1 if `demographicsgender` is equal to 1.

```
replace female2 = 0 if demographicsgender2 == 2
replace female2 = 1 if demographicsgender2 == 1
```

Let's label it as well

```
label define gender2 0 "Male" 1 "Female"
label values female2 gender2
```

Because you set all the values to missing and do not recode the 3 values to anything, they will remain missing. Let's double check with our crosstab using `tabulate`. We'll add `, missing` to see if the 3 values were recoded correctly (and everything looks good).

```
tab female2 demographicsgender2, missing
```

Female (Male/Female)	demographics.gender				Total
	female	male	married	c	
Male	0	2,328	0	0	2,328
Female	249	0	0	0	249
.	0	0	3	34	37
Total	249	2,328	3	34	2,614

Note: In Stata when you are creating something new, as with the generate, you use a single equals sign. Your new variable `female` *should equal* what follows. When you're writing a test statement referring to something that already exists, you use double equals sign (`==`), as we do in the second part of the replace command. .

Now let's try another example, looking at the variable for age:

```
tab demographicsage, missing
```

demographic	s.age	Freq.	Percent	Cum.
-42	1	0.04	0.04	
-7	1	0.04	0.08	
0	383	14.65	14.73	
12	1	0.04	14.77	
21	1	0.04	14.80	
24	2	0.08	14.88	

28		2	0.08	14.96
29		4	0.15	15.11
30		4	0.15	15.26
31		5	0.19	15.46
32		4	0.15	15.61
33		8	0.31	15.91
34		6	0.23	16.14
35		8	0.31	16.45
36		7	0.27	16.72
37		8	0.31	17.02
38		7	0.27	17.29
39		10	0.38	17.67
40		13	0.50	18.17
41		15	0.57	18.75
42		18	0.69	19.43
43		19	0.73	20.16
44		25	0.96	21.12
45		29	1.11	22.23
46		42	1.61	23.83
47		35	1.34	25.17
48		46	1.76	26.93
49		57	2.18	29.11
50		65	2.49	31.60
51		42	1.61	33.21
52		54	2.07	35.27
53		44	1.68	36.95
54		47	1.80	38.75
55		63	2.41	41.16
56		55	2.10	43.27
57		60	2.30	45.56
58		63	2.41	47.97
59		61	2.33	50.31
60		76	2.91	53.21
61		54	2.07	55.28
62		64	2.45	57.73
63		61	2.33	60.06
64		65	2.49	62.55
65		52	1.99	64.54
66		56	2.14	66.68
67		50	1.91	68.59
68		64	2.45	71.04
69		65	2.49	73.53
70		59	2.26	75.78
71		55	2.10	77.89
72		59	2.26	80.15
73		52	1.99	82.13

74		46	1.76	83.89
75		36	1.38	85.27
76		45	1.72	86.99
77		43	1.64	88.64
78		30	1.15	89.79
79		26	0.99	90.78
80		21	0.80	91.58
81		28	1.07	92.65
82		24	0.92	93.57
83		26	0.99	94.57
84		20	0.77	95.33
85		25	0.96	96.29
86		21	0.80	97.09
87		18	0.69	97.78
88		17	0.65	98.43
89		7	0.27	98.70
90		12	0.46	99.16
91		4	0.15	99.31
92		6	0.23	99.54
93		4	0.15	99.69
94		3	0.11	99.81
95		2	0.08	99.89
96		2	0.08	99.96
98		1	0.04	100.00
-----+-----				
Total		2,614	100.00	

The major concern is that there are some numbers that seem unreasonable. Age is not negative, and 0 is an unlikely age for a person in a billionaire dataset. Let's recode those variables to missing (.) for now. First we generate a new variable named something simpler and easier to type and label it.

```
generate age = demographicsage
label variable age "Age (recoded)"
```

Now you'll use `recode` to set any values 0 or below to missing.

```
replace age = . if age <= 0
```

Use `summarize` to check the new range.

```
summarize age
```

Variable		Obs	Mean	Std. dev.	Min	Max
-----+-----						
age		2,229	62.57649	13.13472	12	98

Use `mdesc` to check the new number of missing values. 385 is equal to all the previous 0, -7, and -42 values.

```
mdesc age
```

Variable	Missing	Total	Percent Missing
age	385	2,614	14.73



Data Tip

Why create a new variable when recoding?

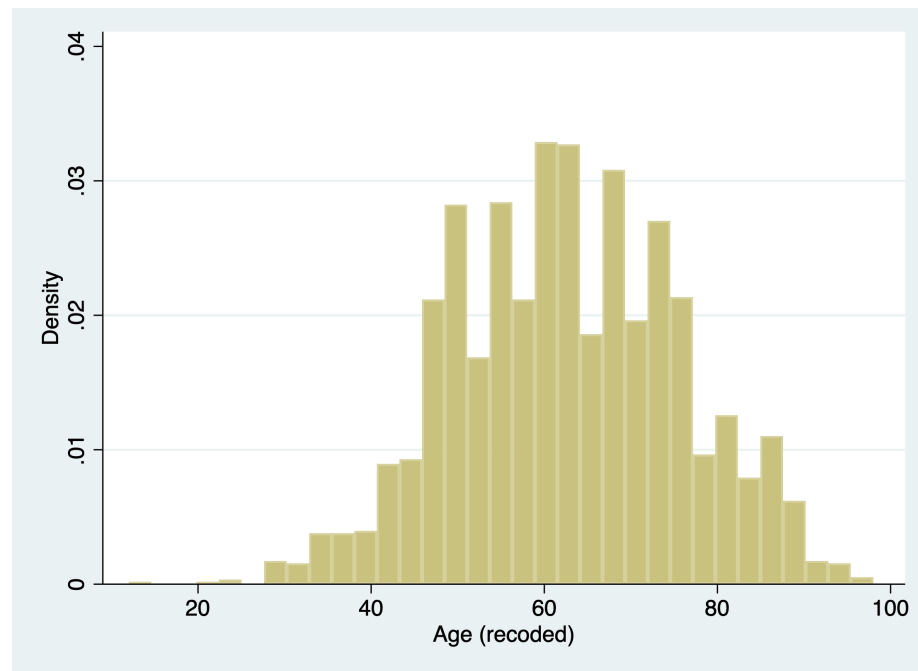
If you have a sharp eye, you'll notice that we created a new variable rather than changing the name of our original variable and recoding it. Data cleaning is an iterative process. You may make mistakes (you will probably make mistakes) or you may change your mind about how to recode a variable. In each case, having the original variable on hand is always helpful. To preserve your original variable, you create a new variable rather than writing over the old one.

Vizualizing variables

Continuous Variables

While frequency tables and descriptive statistics are helpful, visualizing continuous variables or discrete variables with a wide range of values can be helpful to get a look at the shape of our data. Histograms or box plots the go to.

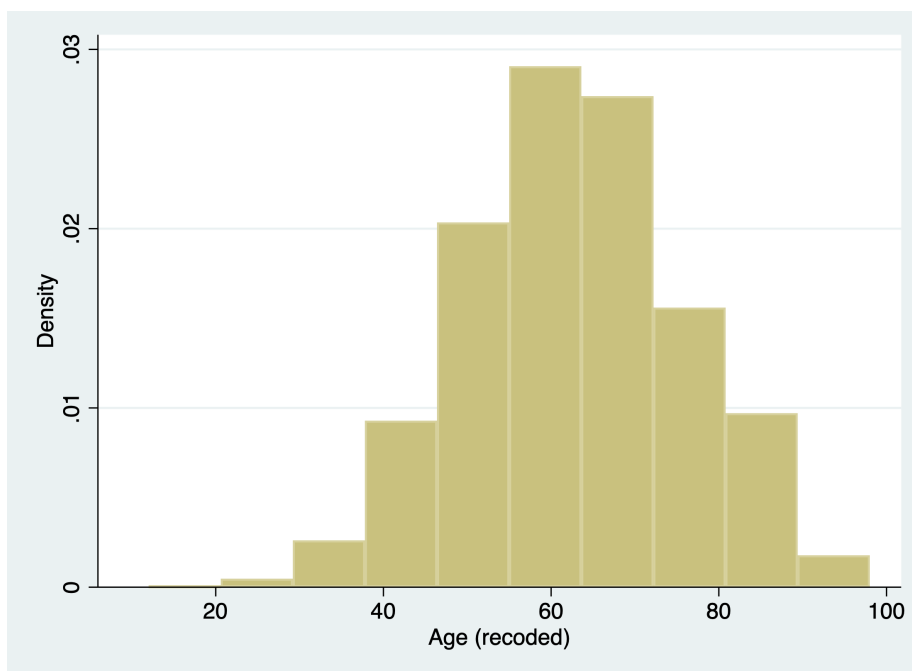
```
histogram age
```



Histograms

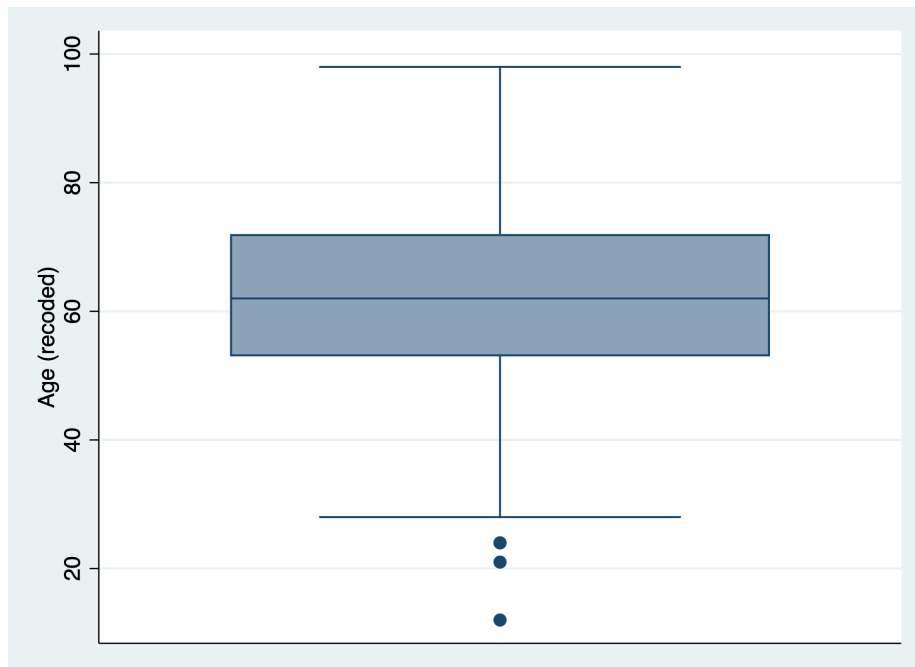
If you want to change the number of bins (i.e. bars),

```
histogram age, bins(10)
```



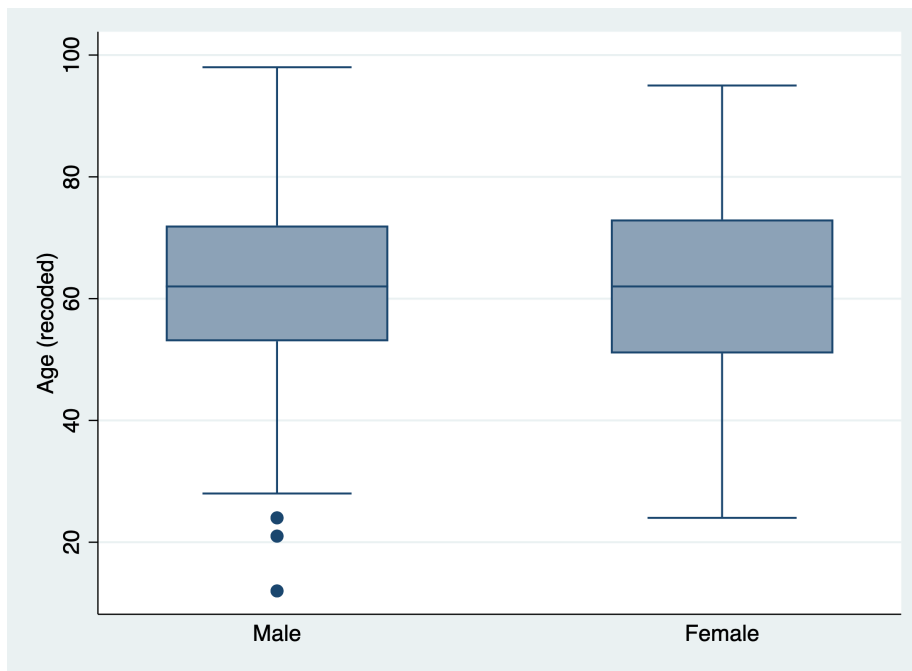
Box plots Let's try making a boxplot of age.

```
graph box age
```



Let's try making a boxplot of age by gender.

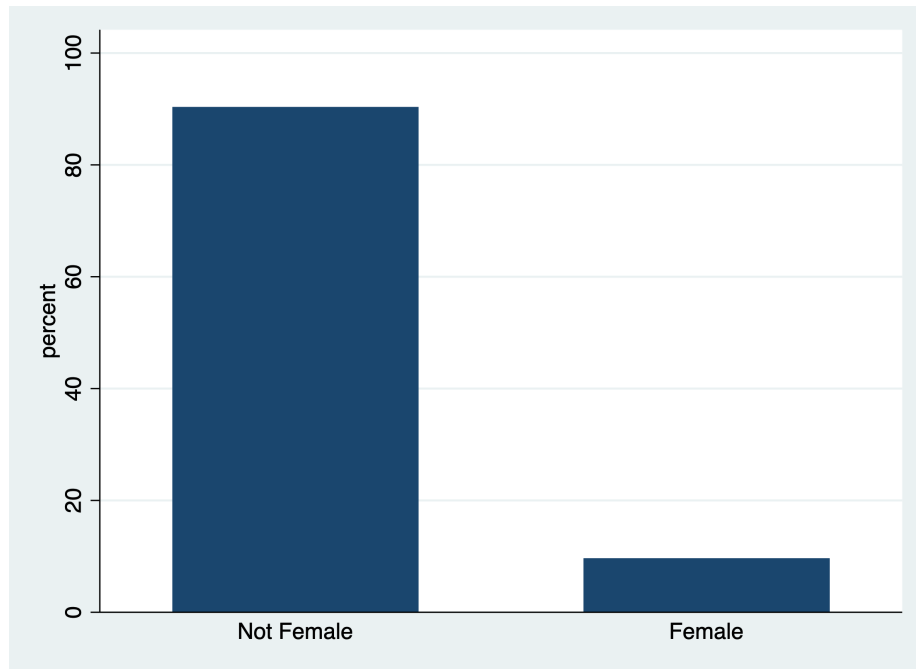
```
graph box age, over(female2)
```



Categorical Variables

Again frequency tables are great, but sometimes a visualization of a categorical data can better communicate patterns. #### Bar plots {- #barplot2}

```
graph bar, over (female)
```



Subsetting and saving data

Sometimes you'll be working with a huge dataset, and it is easier and cleaner to save a portion of observations and/or variables in a new dataset. This is called a sub-sample.

Subset your data to specific variables

Let's say you only want to keep the following three variables: year and the two variables you just created: age and female. For this task, you can use the `keep` command. We'll check it with the `describe` command.

```
keep year age female2
describe
```

Contains data from data_raw/SOC401_W21_Billionaires.dta

Observations: 2,614

Variables: 3

9 Jan 2021 15:56

Variable name	Storage type	Display format	Value label	Variable label
year	int	%8.0g		


```
female2      float    %9.0g      gender2      Female (Male/Female)
age          float    %9.0g                      Age (recoded)
```

Sorted by:

Note: Dataset has changed since last saved.

You can also use the `drop` command if you only want to exclude a variable or two.

```
drop female2
```

Subset your data to specific observations

But what if you wanted to subset the data to only billionaires 30 or older? For this you can also use the `drop` command with an `if` conditional statement added. We'll check it with `summarize`.

```
drop if age < 30
summarize age
```

(10 observations deleted)

Variable	Obs	Mean	Std. dev.	Min	Max
age	2,219	62.74448	12.91838	30	98

Saving your subset

Now that you have your subset, you'll want to save it. Saving in Stata's data, format is simple. You add the `, replace` for when you are rerunning this `.do` file. If there is already a dataset named `mysubset.dta`, then stata will save over it with your new changes. **Take care** with saving over datasets. The action cannot be undone.

```
save "data_work/mysubset.dta", replace
```

There are extra steps to save it other formats. `.CSV` files, are one of the most common formats you'll receive and save data in outside of Stata.

```
export delimited using data_work/mysubset.csv, replace
```

Remember, every time you run these command it writes over your previous save. So be careful about version control and **ALWAYS** maintain the raw data file in a separate location.

2.5 The Importance of Annotation and Clean Code

A do file (aka a script) is not just a functional document where you conduct your analysis. It is also an important record of your analysis. When you read back through your do files you should be able to understand what each step of code is doing and why. Well-written code scripts:

- Have a header with your name and a title or a short description of what the script contains (e.g., “Cleaning data for regression analysis on billionaires”)
- Document the analytic decisions made about cleaning and analysis
- Can be run from start to finish without errors

You may think that you will remember what you were thinking when you wrote a script, but sometimes you’ll have to step away from an analysis for weeks or months. When you come back to it, your notes will remind you exactly why you coded things the way you did. Your code scripts will also be read by other people. It may be collaborators, advisers, or colleagues who agree to quality check your code to look for errors. It is also more and more common for journals to ask scholars to post their coding files so that other people can replicate your analysis.

How to make notes in your script

The main way to make a note in an Stata .do script is to use the `*` at the beginning of a line.

Let’s return to our code to subset our data to billionaires 30 or older. In this code I note above the command what it is about to do. In the second command, I include a note on the same line to remind myself that I want to check to make sure the code I ran worked correctly.

```
drop if age < 30
* Drop observations where age is greater than or equal to 30 years.
```

You can also use `/* */` to create notes that span across multiple lines. For exam-

```
* INDEPENDENT VARIABLE – Age (Continuous)
* Let's take a look at the age variable before we work with it.
  tab demographicsage, missing

/* The major concern is that there are some numbers that seem unreasonable.
   Age is not negative, and 0 is an unlikely age for a person in a
   billionaire dataset. Let's recode those variables to missing (.)
   for now.*/
```

ple:

If you want to add a note to the end of a command you can put a double slash //

```
* Labeling each value in the data
```

```
tab female demographicsgender2 // Checking the variable
```

Tips for Neat Code

Notes are a huge part of making your code readable to yourself and others. However, writing neat code is also an enormous gift you can give to yourself, to the TA grading your do files, and anyone else trying to make sense of your code. Here are my top tips for writing neat code in Stata:

- Split long functions and commands across multiple lines
- Leave spaces around equals signs and other operators
- Create headers and sections in your code
- Create clear names for your variables

Split long functions and commands across multiple lines

Nothing, I repeat, nothing makes code harder to read than shoving it all into one long line. It can be a little tricky to split some commands across multiple lines in Stata, but it is possible and makes your code much cleaner. You can do so by adding a triple forward slash to the end of a line (///). This tells stata that the command continues on the next line. You can use this over as many lines as you want.

Take this example. Say we wanted to keep many variables in our subset.

```
keep wealthworthinbillions demographicsage demographicsgender2 wealthhowinherited2 wealthtype2 we
```

These lines of code will run just fine, but they are difficult for your eye to parse when squished together. Let your code breathe!

```
keep wealthworthinbillions demographicsage demographicsgender2 ///
    wealthhowinherited2 wealthtype2 wealthhowcategory2 locationregion2
```

As a rule, don't let any line get past about 80 characters. Stata .do files include a vertical line at about this point. I recommend that you don't write past it in your code scripts. It will help you and the reader avoid the annoying horizontal scroll bar.

Leave spaces around operators

This is another tip to let your code breathe! When coding it is best practice to put a space after any comma or logical operator. Take the line of code below:

```
replace female2=0 if demographicsgender2==2 | demographicsgender2==3  
replace female2=1 if demographicsgender2==1
```

It works, but it's cluttered and makes it difficult to read. Take a look at this line in a cleaner format:

```
replace female2 = 0 if demographicsgender2 == 2 | demographicsgender2 == 3  
replace female2 = 1 if demographicsgender2 == 1
```

Notice how I've added a space on both sides of the equals signs. This makes it easier to understand and edit your code.

Create headers and sections in your code

You wouldn't write a paper without any titles or sections, so don't write your code without titles or sections! Take a look back at the Stata do script for this lab. Notice how I put a section header for setting up your environment, exploring your data, cleaning your data, and so on. Hopefully this made it easier for you to work through the script.

Create clear names for your variables

Everyone has their own preferred naming system for variables and data sets. The golden rule for naming is consistency. For example, if I recode variables I will often add `_rc` to the end for recode (e.g., `age` and `age_rc`). Other tips:

- Make your names explicit, but brief (e.g., `billionaires_over30.dta`)
- Don't include spaces in your file names, it makes file paths difficult

2.6 Activity

For this class, we expect you to write legible, clean code. To kick start this process, I want you to begin develop your own coding style. By class on Monday, email me (rosewerth@u.northwestern.edu) a script file for a hypothetical data cleaning script. The script should include:

- 1) A script header with your name, the date you created the script, and a short description of what the script contains
- 2) Two section headers
- 3) A command to set your working directory to the main folder you created in this lab
- 4) A note telling me what you find easy about coding in Stata and what you find difficult about coding in Stata.

This should be your template for writing clean scripts for the rest of the quarter. Your template can evolve, but I expect all your scripts moving forward to contain title and section headers and clear annotation for each step in your code.

Chapter 3

Lab 1 (R)

3.1 Lab Goals & Instructions

- Review the basics of data cleaning
- Learn the importance of annotating code
- Start develop your own coding style

Instructions

1. Download the data file (`SOC401_W21_Billionaires.rda`) and R script (`401-1-Lab1.R`) from the links below.
2. Create a project following the instructions in 3.3 below
3. Work through the R script, executing each line of code. This page contains the same material, with more explanation about the functions used.
4. Read through the Importance of Annotation and Clean Code, and complete the short activity at the bottom of the page. Email the .R script file to me by class on Monday.

Jump Links to Functions in this Lab:

Global view of dataset

List of variable names

First 10 rows of data set or variable values

Missing observations

Descriptive statistics

Frequency tables

`mutate`

`ifelse`

Histogram with base R

Histogram with `ggplot`

Boxplot with `ggplot` Bar plot with `ggplot` select

filter
Save data files

3.2 Lab Files

3.3 Create a Project

In R, it is always best to work within what is called a “Project” when you are coding and analyzing data. Life can get messy and so can data analysis. Creating a project and a file structure is the equivalent of keeping a clean work space. You may not mind a messy desk, but a messy file structure will be a nightmare for your collaborators and increase your risk of making mistakes in your analysis. With quantitative data analysis, file management is crucial. RStudio has created a wonderful project management tool for you. It’s an umbrella file that organizes all your scripts, folders, figures, and more. It also sets your working directory for you, which we will discuss more below.

For your first task, create a project in R for this class.

1. Open RStudio.
2. Click the “File” menu button, then “New Project”.
3. Click “New Directory”.
4. Click “New Project”.
5. Type in the name of the directory to store your project, e.g. “401-1_Linear Regression”. Make sure you choose the parent folder on your computer where you want these files to be stored. Your project will live in new folder with the name you gave your directory. Your project and all your files will be stored there.
6. Click the “Create Project” button.

Now let’s make sure you can open this project, create a file folder structure, and move your lab files for today into the appropriate spot.

1. Exit RStudio
2. Navigate to the folder where you created your directory. Double click on the `.Rproj` file you created.
3. Open up a blank R script and use the following code to create a file structure.

```
dir.create("data_raw")  
dir.create("data_work")  
dir.create("fig_output")  
dir.create("scripts")
```

4. Move `SOC401_W21_Billionaires.rda` to your `data_raw` folder.

5. Move `401-1-Lab1.R` to your `scripts` folder.

For more information on best data management practices, and to see the source of some of the instructions above check out this R tutorial.



Data Tip

Why do I need two separate folders for data?

You should always store your original, raw data files in a place where they are in no danger of being saved over, altered, or lost. One great way of protecting your original data files is to create two folders for data: one folder for your raw files and one folder where you can save cleaned datasets and subsets.

3.4 Data Cleaning

95 percent of the work of quantitative research is getting your data in shape to run your model. This tutorial assumes that you have R downloaded and are familiar with the basics of the language. If you are not, here are some resources to help you get started coding in R.

- R for Data Science. A great online book to help you learn R on your own.
- R Programming Tutorials on Youtube
- A quick tutorial for the Tidyverse. The tidyverse makes datacleaning in R a much simpler process.
- A great book on ggplot2. ggplot2 is the best package for making graphs in any software.

Northwestern's Research Computing Services offers great trainings in a variety of software languages, including R, on a regular basis. Check them out and get on their email list.

Set up the environment

Before you get to work cleaning your data, you need to let the software know where to grab and save your files. This saves you from having to type in a long file path anytime you want to do something. If you are working in a project, you are good to go! Not sure if you are working in your project? If you look in the top right corner of your RStudio window, you should see the name of your project next to the project icon. If you see "None" or a different name, that means you need to open your project and start working from there! If you are not working in a project, you should begin your file by setting your working directory. Your working directory is the folder on your computer where you want to store all your data and script files. Below you will see the path to my

working directory. You should replace the filepath with the one you want to use.

```
# Set your working directory
setwd("~/Documents/Work & Research/Regression Labs")
```

Load your libraries

When you are cleaning datasets these are the basic packages that are useful. Make sure you load them before beginning work.

```
library(tidyverse)
library(dplyr)
library(janitor)
library(ggplot2)
library(skimr)
library(pillar)
```

Attaching package: 'kableExtra'

The following object is masked from 'package:dplyr':

```
group_rows
```

Note: if you do not have one of these packages installed, you will need to first install it using the command: `install.packages("skimr")`

Load your data

Now that you've set your working directory, you can tell R to go grab your data and load it into your working environment. Loading data that is in R's data formats is easy. An R data file ends in `.rda` or `.rData`.

```
load("data_raw/SOC401_W21_Billionaires.rda")
```

You can also load data in other formats. Here are a few common ones.

```
# Stata
read_dta("data_raw/SOC401_W21_Billionaires.dta")

# CSV
read_csv("data_raw/SOC401_W21_Billionaires.csv")
```

Check out this tutorial on how to load excel data: <https://www.datacamp.com/community/tutorials/r-tutorial-read-excel-into-r>

At this point, it can also be helpful to rename your dataset to something short and easy to type. You are going to be typing it a lot in your R code.

```
mydata <- SOC401_W21_Billionaires # this saves the dataset as a new dataframe in our e
```

Exploring your data

When you begin any new project, it is important to understand the condition of your variables. Here are a few important functions you need to begin that process.



Data Tip

Remember if this script or any other uses a function that you are not familiar with, you can search for the function online or type ‘?’ and then the name of the function you want to look up in the console. For example, ‘?ifelse()’ will pull up the documentation for that function.

Let’s start by taking a global look at your dataset.

There are countless ways to do this, but I am providing you with two helpful functions from two different packages.

Option 1 from the `skimr` library:

```
skim_without_charts(mydata)
```

Error in kable_latex(x = structure(c("Name", "Number of rows", "Number of columns", : unused argu

The `skim_without_charts()` function does several great things. It includes the number of observations (rows) and variables (columnns), separates the variables by type (e.g., character vs. numeric), it has a nice compact presentation format, and includes all your basic descriptive statistics.

Option 2 from the `pillar` library:

```
glimpse(mydata)
```

Rows: 2,614

Columns: 21

```
$ name          <chr> "Bill Gates", "Bill Gates", "Bill Gates", "Warre~
$ rank          <dbl> 1, 1, 1, 2, 2, 2, 3, 3, 3, 4, 4, 4, 5, 5, 5, 6, ~
$ year          <dbl> 1996, 2001, 2014, 1996, 2001, 2014, 1996, 2001, ~
$ companyfounded <dbl> 1975, 1975, 1975, 1962, 1962, 1990, 1896, 1975, ~
$ companyname    <chr> "Microsoft", "Microsoft", "Microsoft", "Berkshir~
$ demographicsage <dbl> 40, 45, 58, 65, 70, 74, 0, 48, 77, 68, 56, 83, 7~
$ locationgdp    <dbl> 8.10e+12, 1.06e+13, 0.00e+00, 8.10e+12, 1.06e+13~
$ wealthworthinbillions <dbl> 18.5, 58.7, 76.0, 15.0, 32.3, 72.0, 13.1, 30.4, ~
$ wealthhowfromemerging <chr> "True", "True", "True", "True", "True", "True", ~
$ wealthhowwasfounder <chr> "True", "True", "True", "True", "True", "True", ~
$ wealthhowwaspolitical <chr> "True", "True", "True", "True", "True", "True", ~
```

```

$ wealthhowinherited2 <dbl> 5, 5, 5, 5, 5, 5, 1, 5, 5, 5, 5, 5, 5, 5, 4, ~
$ wealthhowcategory2 <dbl> 4, 4, 4, 7, 7, 5, 4, 4, 5, 3, 4, 7, 3, 5, 4, 3, ~
$ wealthtype2 <dbl> 2, 2, 2, 2, 2, 4, 3, 2, 2, 5, 2, 2, 5, 2, 2, 3, ~
$ wealthhowindustry2 <dbl> 15, 15, 15, 3, 3, 7, 16, 15, 14, 13, 15, 3, 6, 1~
$ locationregion2 <dbl> 6, 6, 6, 6, 6, 4, 3, 6, 3, 2, 6, 6, 2, 3, 6, 2, ~
$ locationcountrycode2 <dbl> 71, 71, 71, 71, 71, 47, 11, 71, 23, 30, 71, 71, ~
$ locationcitizenship2 <dbl> 71, 71, 71, 71, 71, 39, 62, 71, 58, 25, 71, 71, ~
$ demographicsgender2 <dbl> 2, 2, 2, 2, 2, 2, NA, 2, 2, 2, 2, 2, 2, 2, 2, ~
$ companysector2 <dbl> 5, 5, 5, 3, 3, 2, 379, 466, 13, 402, 10, 3, 66, ~
$ companyrelationship2 <dbl> 32, 32, 32, 32, 32, 32, NA, 32, 32, 44, 32, 32, ~

```

The `glimpse` function is not as compact as `skim`, but it also includes the number of observations and variable, the class of each variable, and unlike `skim` it shows the first several observations for each variable. This can be helpful for seeing the structure of the values for each variable.

You can also get a list of all the variable names in your data set

```
names(mydata)
```

```

[1] "name"           "rank"           "year"
[4] "companyfounded" "companyname"    "demographicsage"
[7] "locationgdp"    "wealthworthinbillions" "wealthhowfromemerging"
[10] "wealthhowwasfounder" "wealthhowwaspolitical" "wealthhowinherited2"
[13] "wealthhowcategory2" "wealthtype2"      "wealthhowindustry2"
[16] "locationregion2"  "locationcountrycode2" "locationcitizenship2"
[19] "demographicsgender2" "companysector2"   "companyrelationship2"

```

View the first 10 rows of your data set. (`#head`)

```
head(mydata)
```

```

# A tibble: 6 x 21
  name      rank  year companyfounded companyname  demographicsage locationgdp
  <chr>    <dbl> <dbl>          <dbl> <chr>              <dbl>         <dbl>
1 Bill Gat~    1  1996          1975 Microsoft             40        8.1 e12
2 Bill Gat~    1  2001          1975 Microsoft             45       1.06e13
3 Bill Gat~    1  2014          1975 Microsoft             58         0
4 Warren B~    2  1996          1962 Berkshire Ha~        65        8.1 e12
5 Warren B~    2  2001          1962 Berkshire Ha~        70       1.06e13
6 Carlos S~    2  2014          1990 Telmex              74         0
# ... with 14 more variables: wealthworthinbillions <dbl>,
#   wealthhowfromemerging <chr>, wealthhowwasfounder <chr>,
#   wealthhowwaspolitical <chr>, wealthhowinherited2 <dbl>,
#   wealthhowcategory2 <dbl>, wealthtype2 <dbl>, wealthhowindustry2 <dbl>,
#   locationregion2 <dbl>, locationcountrycode2 <dbl>,

```

```
# locationcitizenship2 <dbl>, demographicsgender2 <dbl>,
# companysector2 <dbl>, companyrelationship2 <dbl>
```

View the first 10 observations of a specific variable

```
head(mydata$name)
```

```
[1] "Bill Gates"      "Bill Gates"      "Bill Gates"      "Warren Buffett"
[5] "Warren Buffett"  "Carlos Slim Helu"
```

Look at missing observations in your dataset

```
sapply(mydata, function(x) sum(is.na(x)))
```

	name	rank	year
	0	0	0
companyfounded	companyname	demographicsage	
	0	0	0
locationgdp	wealthworthinbillions	wealthhowfromemerging	
	0	0	0
wealthhowwasfounder	wealthhowwaspolitical	wealthhowinherited2	
	0	0	0
wealthhowcategory2	wealthtype2	wealthhowindustry2	
	1	22	1
locationregion2	locationcountrycode2	locationcitizenship2	
	0	0	0
demographicsgender2	companysector2	companyrelationship2	
	34	23	46

You can also pull up descriptive statistics for your entire data set using the `summary` function.

```
summary(mydata)
```

	name	rank	year	companyfounded
Length:	2614	Min. : 1.0	Min. :1996	Min. : 0
Class :	character	1st Qu.: 215.0	1st Qu.:2001	1st Qu.:1936
Mode :	character	Median : 430.0	Median :2014	Median :1963
		Mean : 599.7	Mean :2008	Mean :1925
		3rd Qu.: 988.0	3rd Qu.:2014	3rd Qu.:1985
		Max. :1565.0	Max. :2014	Max. :2012
	companyname	demographicsage	locationgdp	wealthworthinbillions
Length:	2614	Min. : -42.00	Min. :0.000e+00	Min. : 1.000
Class :	character	1st Qu.: 47.00	1st Qu.:0.000e+00	1st Qu.: 1.400

```

Mode :character  Median : 59.00  Median :0.000e+00  Median : 2.000
                Mean  : 53.34  Mean  :1.769e+12  Mean  : 3.532
                3rd Qu.: 70.00  3rd Qu.:7.250e+11  3rd Qu.: 3.500
                Max.   : 98.00  Max.   :1.060e+13  Max.   :76.000

```

```

wealthhowfromemerging wealthhowwasfounder wealthhowwaspolitical
Length:2614           Length:2614           Length:2614
Class :character      Class :character      Class :character
Mode  :character      Mode  :character      Mode  :character

```

```

wealthhowinherited2 wealthhowcategory2 wealthtype2  wealthhowindustry2
Min.   :1.000        Min.   :1.000        Min.   :1.000        Min.   : 1.000
1st Qu.:4.000        1st Qu.:3.000        1st Qu.:2.000        1st Qu.: 4.000
Median :5.000        Median :5.000        Median :3.000        Median : 9.000
Mean   :4.386        Mean   :4.662        Mean   :3.055        Mean   : 8.715
3rd Qu.:5.000        3rd Qu.:6.000        3rd Qu.:4.000        3rd Qu.:13.000
Max.   :6.000        Max.   :9.000        Max.   :5.000        Max.   :19.000
                NA's   :1                NA's   :22          NA's   :1
locationregion2 locationcountrycode2 locationcitizenship2 demographicsgender2
Min.   :1.000        Min.   : 1.00        Min.   : 1.00        Min.   :1.000
1st Qu.:3.000        1st Qu.:23.00       1st Qu.:23.00       1st Qu.:2.000
Median :4.000        Median :48.00       Median :53.00       Median :2.000
Mean   :4.236        Mean   :45.67       Mean   :46.76       Mean   :1.905
3rd Qu.:6.000        3rd Qu.:71.00       3rd Qu.:71.00       3rd Qu.:2.000
Max.   :8.000        Max.   :74.00       Max.   :73.00       Max.   :3.000
                NA's   :34
companysector2  companyrelationship2
Min.   : 1.0     Min.   : 1.00
1st Qu.:132.0    1st Qu.:32.00
Median :299.0    Median :32.00
Mean   :271.9    Mean   :45.27
3rd Qu.:402.0    3rd Qu.:66.00
Max.   :520.0    Max.   :74.00
NA's   :23      NA's   :46

```

You can use the same function to look at a specific variable.

```
summary(mydata$wealthworthinbillions)
```

```

    Min. 1st Qu.  Median    Mean 3rd Qu.    Max.
 1.000   1.400   2.000   3.532   3.500   76.000

```

If you want to look at individual descriptive statistics, you can use the following functions to get the mean, range, or standard deviation of variables. These

functions can be helpful checks as you work on cleaning a dataset.

```
mean(mydata$demographicsage)
```

```
[1] 53.34124
```

```
range(mydata$demographicsage) #hmm...notice anything odd about this range?
```

```
[1] -42 98
```

```
sd(mydata$demographicsage)
```

```
[1] 25.33332
```

You can also produce a frequency table for a specific variable.

This function makes use of pipes (`%>%`) and `tidyverse` functions. It starts with a dataset and pipes that data through various commands. In this command, we tell R to group the data by year and then count the number of observations for each unique year in the dataset.

```
mydata %>%
  group_by(year) %>%
  count()
```

```
# A tibble: 3 x 2
# Groups:   year [3]
   year     n
  <dbl> <int>
1  1996   423
2  2001   538
3  2014  1653
```

If you want to add percentages to the table, you can add another column to the table and calculate the percentage. We also make use of the `round()` function to limit the values to two decimals.

```
mydata %>%
  group_by(year) %>%
  count() %>%
  mutate(percent = round(n / nrow(mydata) * 100, 2))
```

```
# A tibble: 3 x 3
# Groups:   year [3]
   year     n percent
  <dbl> <int>   <dbl>
1  1996   423    16.2
2  2001   538    20.6
3  2014  1653    63.2
```

Cleaning variables

In the previous section, we learn the code to check the state of a variable when we first open the dataset. Most of the time, you're likely to find that the variable isn't ideal to work with. It is important to use this commands to make a variable ready for your use.

Let's take a closer look at the variable for gender:

```
mydata %>%
  group_by(demographicsgender2) %>%
  count()
```

```
# A tibble: 4 x 2
# Groups:   demographicsgender2 [4]
  demographicsgender2     n
      <dbl> <int>
1             1      249
2             2     2328
3             3         3
4            NA        34
```

With this code, we use a pipe (%>%) to create a frequency table to see what the values and frequencies look like. I notice a few things you will want to change about that variable:

- The variable name is tedious to type
- We want this to be a dummy variable where 1 is female and 0 is not female (in this binary, male).
- We have three married couples in our data set coded as 3

Let's create a new variable with a better name and recode it how you'd like it. Here you will recode the variable using the `mutate()` function and the `ifelse()` function, which are helpful for recoding based on previous variable. If you want to label the 3 married couples as 0, aka not female...

```
# Recode the variable
mydata <- mydata %>%
  mutate(female = ifelse(demographicsgender2 == 1, 1, 0))

# Check the new variable using a frequency table.
mydata %>%
  group_by(female) %>%
  count()
```

```
# A tibble: 3 x 2
# Groups:   female [3]
  female     n
    <dbl> <int>
```


1	0	2331
2	1	249
3	NA	34

For this recoding we used two new functions.

mutate() to create new variables

mutate() is a function found in the tidyverse to create a new variable. You simply put the name of the new variable we want to use, a single equals sign, and whatever code will create the variable we want. In this case you're saying create a new variable named **female** and set it equal to 1 if the previous variable, **demographicsgender2**, is equal to 1 and set it equal to 0 if it's any other value. R maintains the missing variables in this case.

Note: In R when you are creating something new, as inside of the mutate statement, you use a single equals sign. Your new variable **female** *should equal* what follows. When you're writing a test statement referring to something that already exists, you use double equals sign (**==**). For example, in the **ifelse** function you use two equals sign because you're looking at the data where **demographicsgender2** is in existing data equal to 1.

ifelse() to write conditional statements

ifelse() is an incredibly helpful function to recode another variable. The function requires you to specify some type of condition. In this case you're saying make this change *if* **demographicsgender2** is equal to 1. If it is equal to one, you tell R what you want to do after the comma— set the value of your new variable equal to one. After the next comma, you tell R *if else* (meaning if **demographicsgender2** is any other value) set the value of our new variable equal to 1.

```
ifelse(test statement, value if test is true, value if test is
false)
```

You can also nest ifelse statements. This is helpful when you have more two values you are recoding. For example, if you want to label the three married couples as NA, so 1 = female, 0 = male you can nest ifelse statements.

```
# Recode
mydata <- mydata %>%
  mutate(female = ifelse(demographicsgender2 == 1, 1, # if gender = 1, recode 1
                        ifelse(demographicsgender2 == 2, 0, NA))) # if gender = 2, recode 0, ife

# Check the new variable
mydata %>%
```

```
group_by(female) %>%
count()
```

```
# A tibble: 3 x 2
# Groups:   female [3]
  female     n
  <dbl> <int>
1      0  2328
2      1   249
3     NA    37
```

Note: by running these two chunks of code back to back, I wrote over my first attempt at creating a new dummy variable ‘female.’ If I want to use the second one that’s fine, but there’s no going back once you overwrite something, so be careful with your code.

Now let’s try another example, looking at the variable for age:

```
mydata %>%
  group_by(demographicsage) %>%
  count()
```

```
# A tibble: 76 x 2
# Groups:   demographicsage [76]
  demographicsage     n
  <dbl> <int>
1      -42      1
2       -7      1
3        0   383
4       12      1
5       21      1
6       24      2
7       28      2
8       29      4
9       30      4
10      31      5
# ... with 66 more rows
```

The major concern is that there are some numbers that seem unreasonable. Age is not negative, and 0 is an unlikely age for a person in a billionaire dataset. Let’s recode those variables to missing (NA) for now. Again, you’ll use `mutate()` and `ifelse()`, and you will name the variable something easier to work with.

```
# Recode the variable
mydata <- mydata %>%
  mutate(age = ifelse(demographicsage <= 0, NA, demographicsage))

# Check the new variable
```

```
mydata %>%
  group_by(age) %>%
  count()

# A tibble: 74 x 2
# Groups:   age [74]
   age     n
   <dbl> <int>
1    12     1
2    21     1
3    24     2
4    28     2
5    29     4
6    30     4
7    31     5
8    32     4
9    33     8
10   34     6
# ... with 64 more rows
```



Data Tip

Why create a new variable when recoding?

If you have a sharp eye, you'll notice that we created a new variable rather than changing the name of our original variable and recoding it. Data cleaning is an iterative process. You may make mistakes (you will probably make mistakes) or you may change your mind about how to recode a variable. In each case, having the original variable on hand is always helpful. To preserve your original variable, you create a new variable rather than writing over the old one.

Vizualizing variables

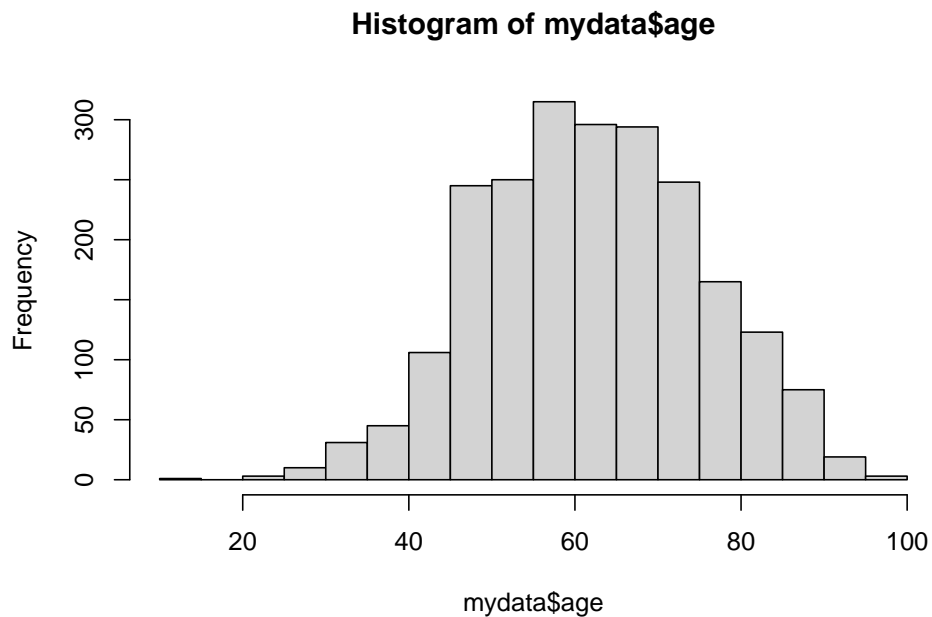
Continuous Variables

While frequency tables and descriptive statistics are helpful, visualizing continuous variables or discrete variables with a wide range of values can be helpful to get a look at the shape of our data. Histograms or box plots the go to.

There are two main ways to create graphs in R, base R plots and `ggplot2`. `ggplot2` has far more flexibility, so we will focus on that package primarily. However, when you are moving fast it can sometimes be helpful to throw up a quick histogram in base R.

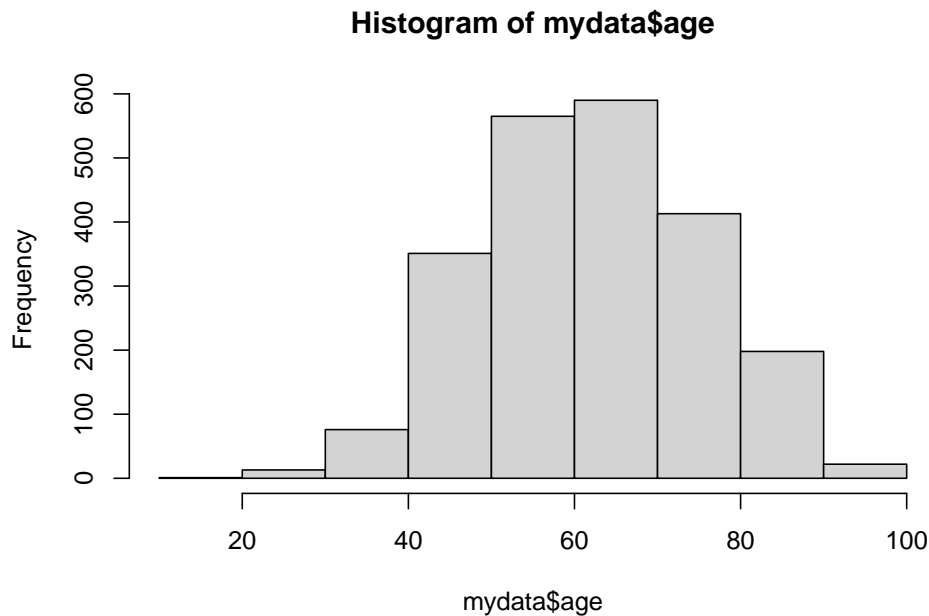
hist() Create a histogram in base R The code for creating a histogram using base R is simple, but you don't have as much flexibility to change aspects of the plot if you want to use it in presentations or papers.

```
hist(mydata$age)
```



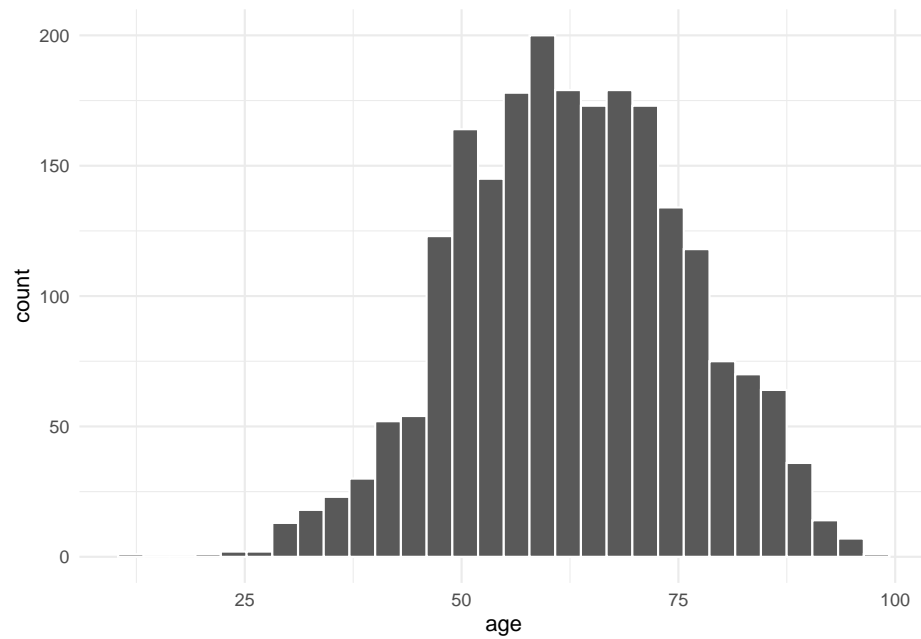
If you want to change the number of bins (i.e. bars), you add a `breaks` argument to the function.

```
hist(mydata$age, breaks = 10)
```



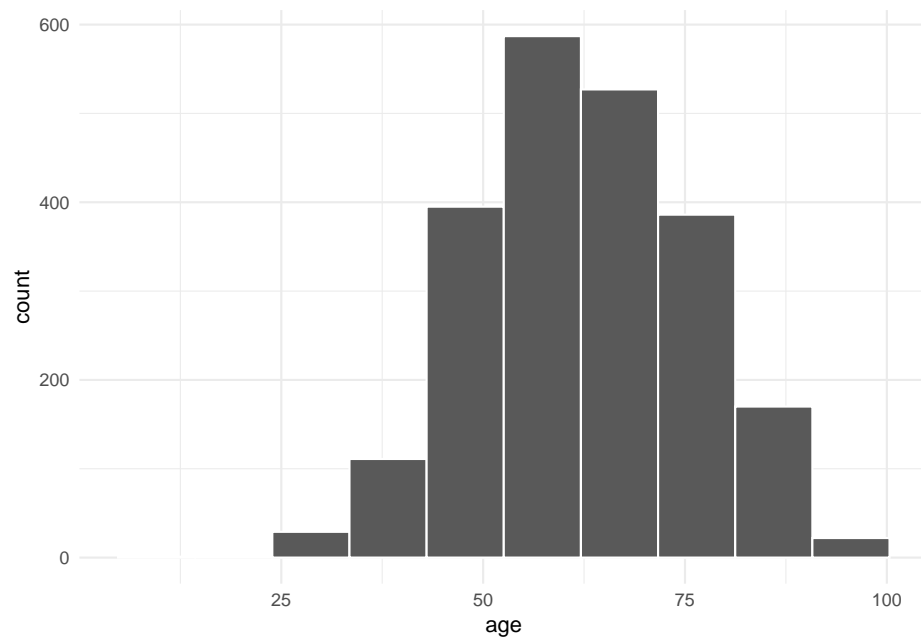
Histograms in ggplot2 As I've mentioned, **ggplot2** has a massive amount of flexibility and a unique grammar to building plots. It is the go-to package to produce quality plots and graphics, but is a lot to learn to use it with ease. If you are interested I recommend taking a **ggplot2** workshop or working through the **ggplot2** book listed in resources at the beginning of this lab. For now, let's build a simple histogram using the **ggplot()** function.

```
# Creatign the plot  
ggplot(data = mydata, aes(x = age)) + #specifying dataset and your variable  
  geom_histogram(color = "white") + #changing the outline of the bars to white  
  theme_minimal() # applying a built-in theme to the graph
```



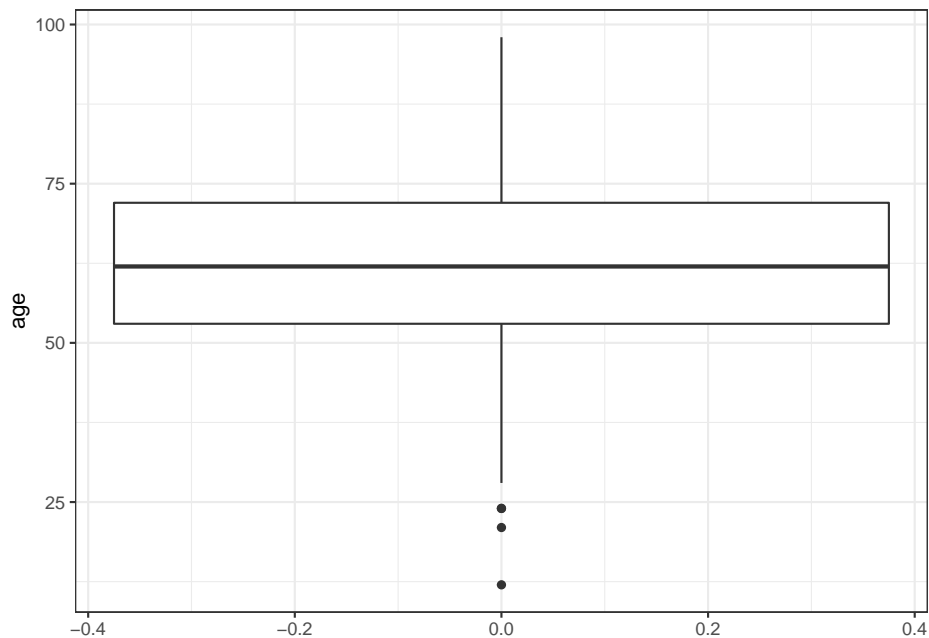
Let's try changing the number of bins.

```
ggplot(data = mydata, aes(x = age)) +  
  geom_histogram(color = "white", bins = 10) +  
  theme_minimal()
```



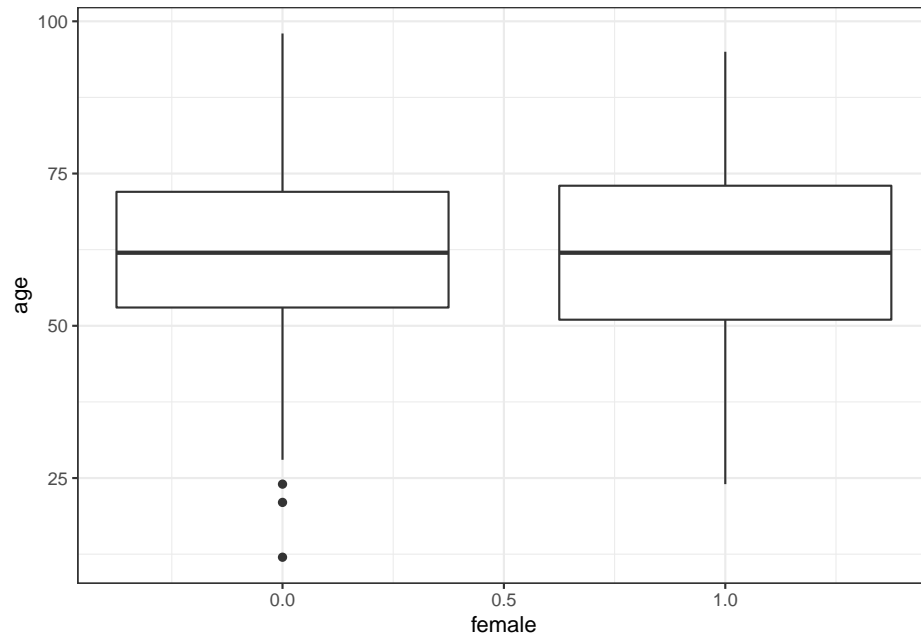
Box plots with ggplot() Let's try making a boxplot of age.

```
ggplot(data = mydata, aes(y = age)) + # Calling the same data, but switched to y axis so the boxplot
  geom_boxplot() + # calling the boxplot geom
  theme_bw() # trying a different theme
```



Let's try making a boxplot of age by gender.

```
ggplot(data = mydata, aes(y = age, x = female, group = female)) +
  # adding x to label the x axis, and grouping by the same variable to create two box plots
  geom_boxplot() + # same geom
  theme_bw() #same theme
```

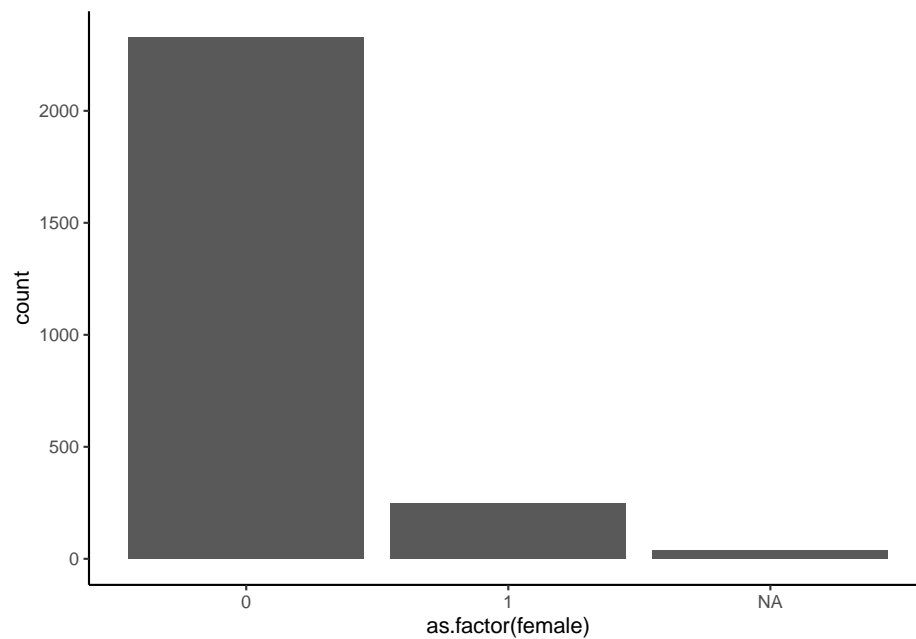


3.4.0.1 Categorical Variables

Again frequency tables are great, but sometimes a visualization of a categorical data can better communicate patterns.

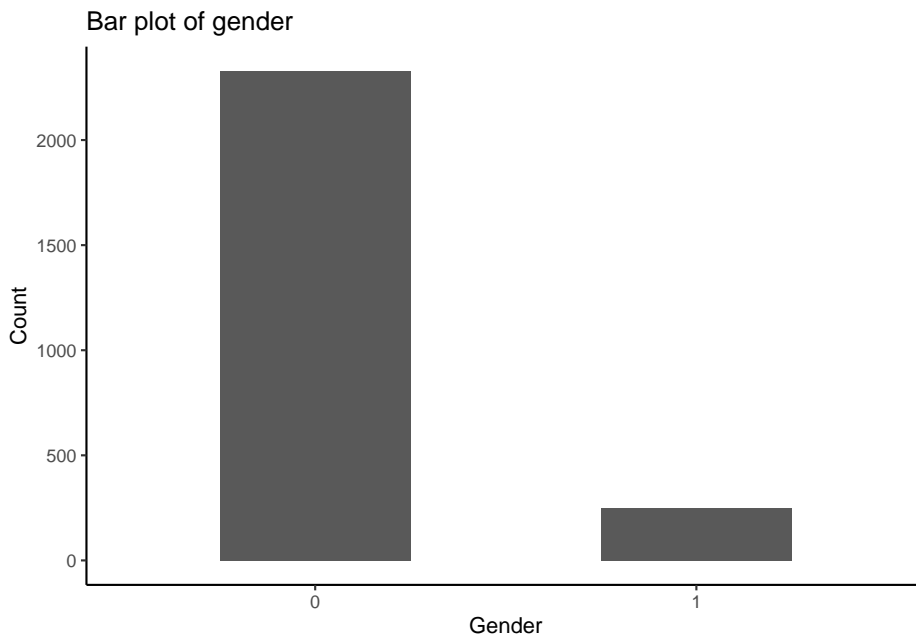
Bar plots with `ggplot()` Let's try making a bar plot of gender. Note I have to turn `female` into a factor. This doesn't permanently transform the variable. It just temporarily transforms the variable for this plot.

```
ggplot(data = mydata, aes(x = as.factor(female))) +
  geom_bar() +
  theme_classic()
```

If I want to remove the NA column, I can also filter the data within the `ggplot` function. I'm also going to clean up the axis labels, add a title, and change the width of the bars.

```
ggplot(data = mydata %>% drop_na(female), aes(x = as.factor(female))) +  
  geom_bar(width = .5) +  
  labs(  
    x = "Gender",  
    y = "Count",  
    title = "Bar plot of gender"  
  ) +  
  theme_classic()
```



Another advantage of ggplot is that the code to save is much easier than base R plots. This code will save the last ggplot that you created. I encourage you to look up other examples of `ggsave` to learn different ways you can save plots as objects, specify height and width, and more.

```
ggsave("figs_output/barplot-example.png")
```

Subsetting and saving data

Sometimes you'll be working with a huge dataset, and it is easier and cleaner save portion of observations and/or variables in a new dataset. This is called a sub-sample.

`select()` to subset your data to specific variables

Let's say you only want to keep the following three variables: year and the two variables you just created: age and female. You can easily subset the data using the `select()` function in tidyverse. In the select function you simply list the variables you want to keep. You can also specify specific variables to drop by putting them in the list with a minus sign in front (example: `-year`, `-age`, `-female`)

```
mysubset <- mydata %>% # note I'm saving this as a new dataframe with a new name  
  select(year, age, female)
```

```
skim_without_charts(mysubset) # you should always check your data when you make a major change to
```

```
Error in kable_latex(x = structure(c("Name", "Number of rows", "Number of columns", : unused argu
```

filter() to subset your data to specific observations

But what if you wanted to subset the data to only billionaires 30 or older? For this task, you can use the `filter()` function. Filter acts exactly like the name implies. Use a conditional statement to specify what observations you want to keep or remove from your dataset.

```
# Filtering data to only billionaires over 30
```

```
mysubset2 <- mydata %>%
  filter(age >= 30)
```

```
range(mysubset2$age) # Another check to see our code worked how we wanted it!
```

```
[1] 30 98
```

Saving your subset

Now that you have your subset, you'll want to save it. Saving in R's data, format is simple.

```
# Saving as r data format (.rda or .rData - both are the same).
```

```
save(mysubset, file = "data_work/mysubset.rda") # note I'm saving this in my working data folder
```

There are extra steps to save it other formats. .CSV files, are one of the most common formats you'll receive and save data in outside of R.

```
write_csv(mysubset, file = "data_work/mysubset.csv")
```

Remember, every time you run these command it writes over your previous save. So be careful about version control and **ALWAYS** maintain the raw data file in a separate location.

3.5 The Importance of Annotation and Clean Code

A script is not just a functional document where you conduct your analysis. It is also an important record of your analysis. When you read back through your script files you should be able to understand what each step of code is doing and why. Well-written code scripts:

- Have a header with your name and a title or a short description of what the script contains (e.g., “Cleaning data for regression analysis on billionaires”)
- Document the analytic decisions made about cleaning and analysis
- Can be run from start to finish without errors

You may think that you will remember what you were thinking when you wrote a script, but sometimes you’ll have to step away from an analysis for weeks or months. When you come back to it, your notes will remind you exactly why you coded things the way you did. Your code scripts will also be read by other people. It may be collaborators, advisers, or colleagues who agree to quality check your code to look for errors. It is also more and more common for journals to ask scholars to post their coding files so that other people can replicate your analysis.

How to make notes in your script

The main way to make a note in an R script is to use the `#`. You can put the `#` at the beginning of the line or after a piece of code. Whatever you type after the `#` will be colored green to indicate notation text that will not be run as code.

Let’s return to our code to filter our data. In this code I note above the command what it is about to do. In the second command, I include a note on the same line to remind myself that I want to check to make sure the code I ran worked correctly.

```
# Filtering data to only billionaires over 30
mysubset2 <- mydata %>%
  filter(age >= 30)

range(mysubset2$age) # Another check to see our code worked how we wanted it!
```

There’s one trick that can be helpful when writing notes in R script. Say you have a note that will take multiple lines. For example, you may want to document the source of the data you are using. If you put a single quotation mark after the hashtag (`#'`), R will automatically make the next line a comment when you press enter. It will work in regular `.R` scripts, but will not work in `.Rmd` files. Try it out!

```
#' This is a comment. When I press enter...
#' The next line will be a comment too.
#'
```

Finally, sometimes you may want to “comment out” a couple lines of code, either temporarily while you are coding or because you want to keep a record of code you don’t need to run again. R has a handy shortcut to let you turn a chunk of codes into comments and turn a chunk of comments into code. You do this

by highlighting the chunk you want to comment in or out and typing **Cmd + Shift + C**. For example, in the following code, I want to remove the line of code that adds a title to my ggplot. I may want to add it back in later, so rather than removing the line of code, I just commented it out. The grammar of *tidyverse* and *ggplot2*, with their pipes and plus signs, make it easy to comment out a specific type of code.

```
ggplot(data = mydata, aes(y = age, x = female, group = female)) +
  geom_boxplot() +
  # labs(
  #   title = "Boxplot of age by gender"
  # ) +
  theme_bw()
```

Tips for Neat Code

Notes are a huge part of making your code readable to yourself and others. However, writing neat code is also an enormous gift you can give to yourself, to the TA grading your scripts, and anyone else trying to make sense of your code. Here are my top tips for writing neat code in R:

- Split long functions and commands across multiple lines
- Leave spaces around equals signs and other operators
- Create headers and sections in your code
- Create clear names for your variables, data frames, and objects

Split long functions and commands across multiple lines

Nothing, I repeat, nothing makes code harder to read than shoving it all into one long line. R doesn't care how many lines you split code across. It will run a function until it gets to the last closed parentheses. Splitting code across multiple lines makes it easier for you to see and edit your code. It makes it way more legible to others reading your code. Look at the difference between these two pairs of commands from earlier in this lab.

```
# Creating a frequency table with percentages
mydata %>% group_by(year) %>% count() %>% mutate(percent = round(n / nrow(mydata) * 100, 2))

# Creating a boxplot with a title
ggplot(data = mydata, aes(y = age, x = female, group = female)) + geom_boxplot() + labs(title = "
```

These lines of code will run just fine, but they are difficult for your eye to parse when squished together. Let your code breathe! Notice how in the clean version of this code below, I even split the `labs()` function across three lines. This may not matter as much here, but if I add an x axis label, y axis label, subtitle, and caption, I would put each on its own line for ease of reading and editing.

```
mydata %>%
  group_by(year) %>%
  count() %>%
  mutate(percent = round(n / nrow(mydata) * 100, 2))

ggplot(data = mydata, aes(y = age, x = female, group = female)) +
  geom_boxplot() +
  # labs(
  #   title = "Boxplot of age by gender"
  # ) +
  theme_bw()
```

As a rule, don't let any line get past about 80 characters. RStudio includes a vertical line at about this point. I recommend that you don't write past it in your code scripts. It will help you and the reader avoid the annoying horizontal scroll bar.

Leave spaces around operators

This is another tip to let your code breathe! When coding it is best practice to put a space after any comma or logical operator. Take the line of code below:

```
mutate(percent=round(n/nrow(mydata)*100,2))
```

It works, but it's cluttered and makes it difficult to read. Take a look at this line in a cleaner format:

```
mutate(percent = round(n / nrow(mydata) * 100, 2))
```

Notice how I've added a space on both sides of the =, the /, and the *. This makes it easier to understand and edit your code.

Create headers and sections in your code

You wouldn't write a paper without any titles or sections, so don't write your code without titles or sections! Take a look back at the R script for this lab. Notice how I put a section header for setting up your environment, exploring your data, cleaning your data, and so on. Hopefully this made it easier for you to work through the script.

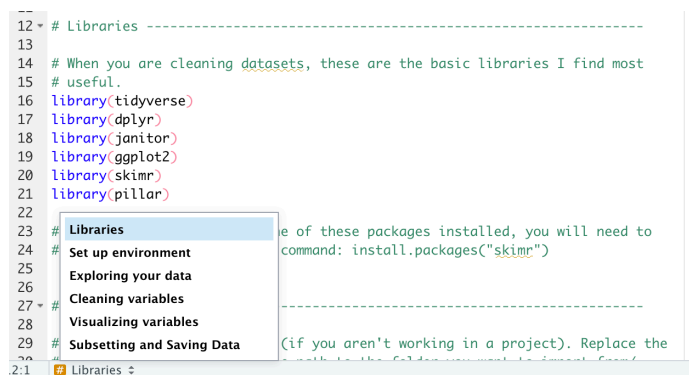
You can create headers with comments, but you can also use a shortcut built into R. If you go to **Code -> Insert Section** or **Ctrl+Shift+R** (**Cmd+Shift+R** on the Mac). This will insert a header and create a code section. Any comment line which includes at least four trailing dashes (-), equal signs (=), or pound signs (#) automatically creates a code section.

```
# Section One -----

# Section Two =====

### Section Three #####
```

You can collapse and expand code sections or use a drop down menu to jump to a code section. Trust me when I say cleaning scripts can get long, and these section headers can be a huge time-saver.



Create clear names for your variables, data frames, and objects

Everyone has their own preferred naming system for variables, data frames, and other R objects. The golden rule for naming is consistency. For example, if I recode variables I will often add `_rc` to the end for recode (e.g., `age` and `age_rc`). Other tips:

* Make your names explicit, but brief (e.g., `table_1`, `table_2`) * Don't include spaces in your file names, it makes file paths difficult

3.6 Activity

For this class, we expect you to write legible, clean code. To kick start this process, I want you to begin develop your own coding style. By class on Monday, email me (rosewerth@u.northwestern.edu) a script file for a hypothetical data cleaning script. The script should include:

- 1) A script header with your name, the date you created the script, and a short description of what the script contains
- 2) Two section headers
- 3) A note telling me what you find easy about coding in R and what you find difficult about coding in R.

This should be your template for writing clean scripts for the rest of the quarter. Your template can evolve, but I expect all your scripts moving forward to contain title and section headers and clear annotation for each step in your code.