Data Tools in R

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About Emily



R hackathon co-organizers, Feb 2019

UNC Chapel Hill (2012 - 2016) B.S. Mathematics, Statistics & Analytics





US Card Analytics (2016 - Present) Analyst to Senior Manager Founded Data & Analytics Tooling team

Hobbies #rstats Twitter (@emilyriederer) Blogging at <u>https://emilyriederer.netlify.app/</u> rOpenSci editor CRC Press reviewer



Data

Analysis Tools

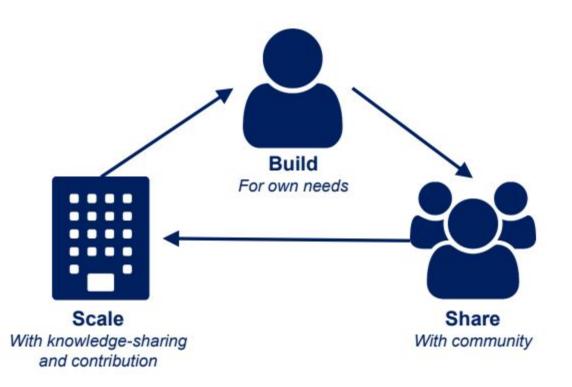
Community

- Datamart design
- Data pipeline development
- Data quality
- Data discoverability

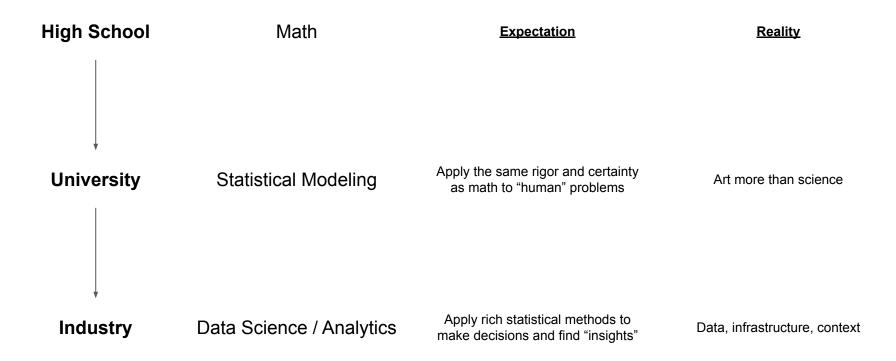
- Conceptual frameworks & R packages for common analytical tasks
- Spanning utilities, devtools, analysis

- Training
- Consulting / mentorship
- Hackathons

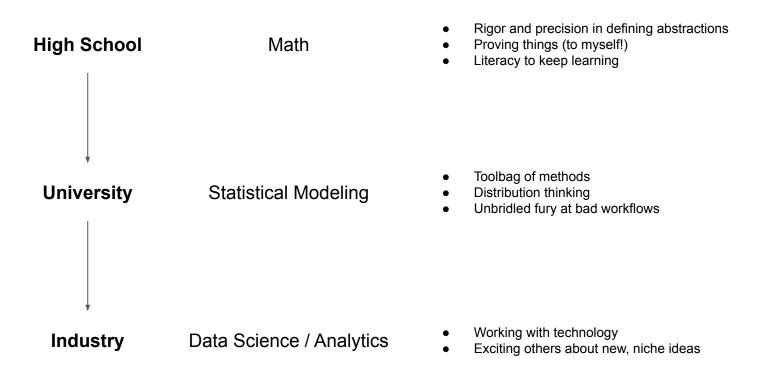
Bring reproducibility and extensibility to business analysis



My career path is predicated on very poor assumptions



My career path gave me an eclectic set of ideas that proved quite useful



Key career realizations

- 1. R Markdown is the gateway to more powerful tools
- 2. Good workflows provide an incredible amount of leverage
- 3. Packages are more than functions on CRAN
- 4. Packages can play many roles in an organization

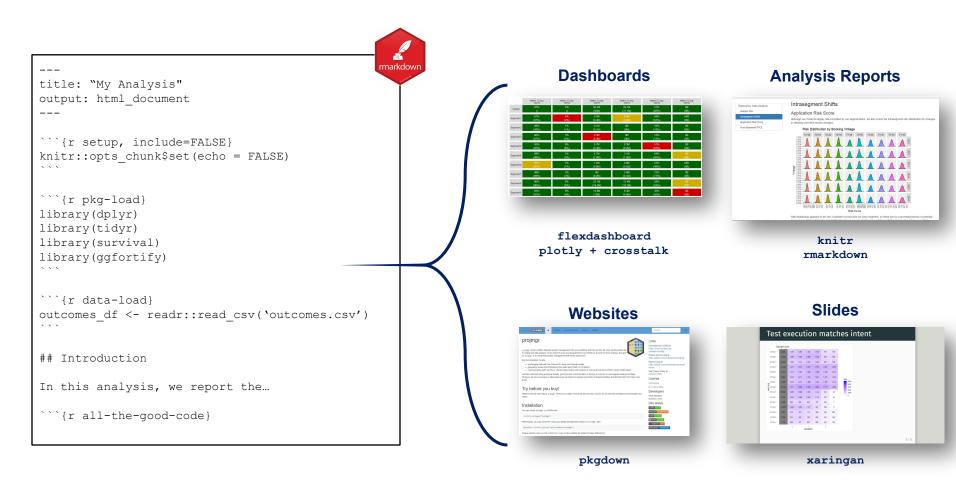
Key career realizations

1.	R Markdown is the gateway to more powerful tools	R Markdown Dri
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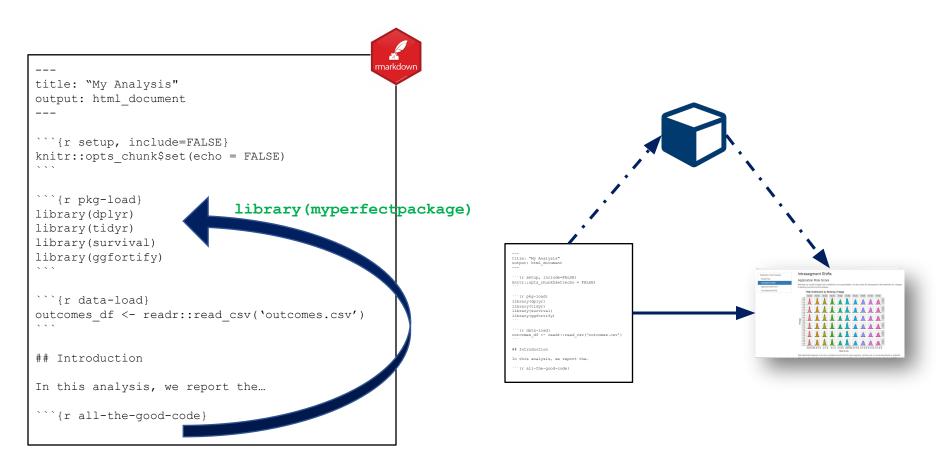
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Beyond R Markdown's polished outputs, it's also a powerful prototyping platform



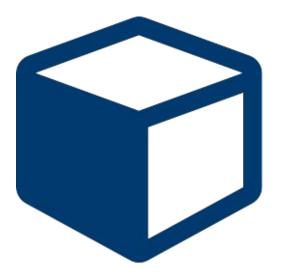
Each analysis depends on a latent tool custom-fit to your domain-specific workflow



This implicit analysis tool already contains core development and design components



- Curated set of related libraries
- Working and "tested" code



This implicit analysis tool already contains core development and design components





- Curated set of related libraries
- Working and "tested" code

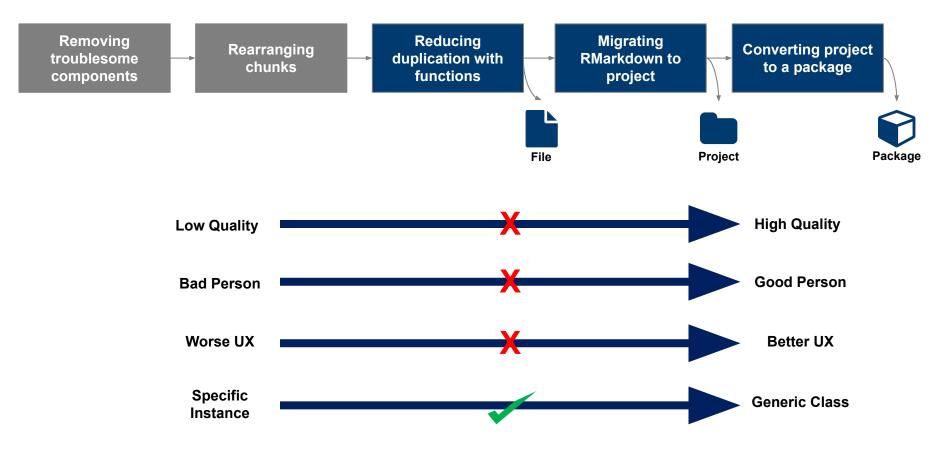


- Comprehensive understanding of user (producer & consumer) requirements
- Sane workflow
- Complete & compelling example

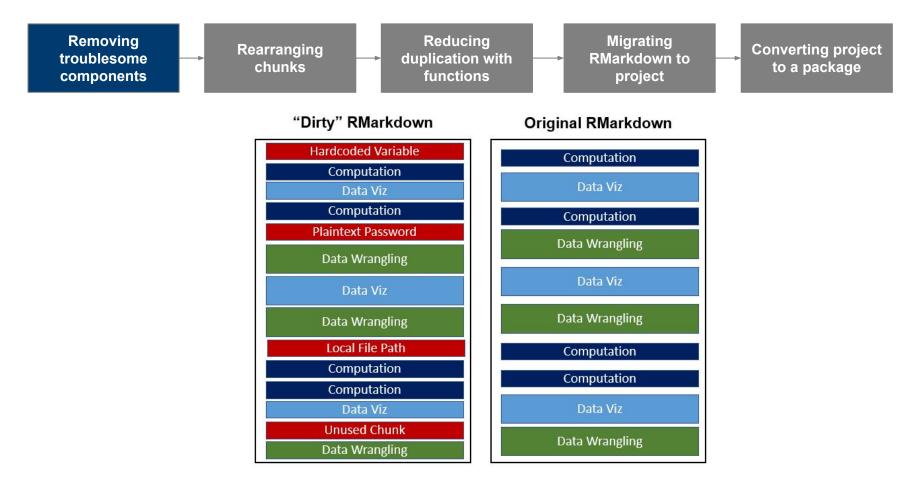
RMarkdown Driven Development (RmdDD) has five main steps



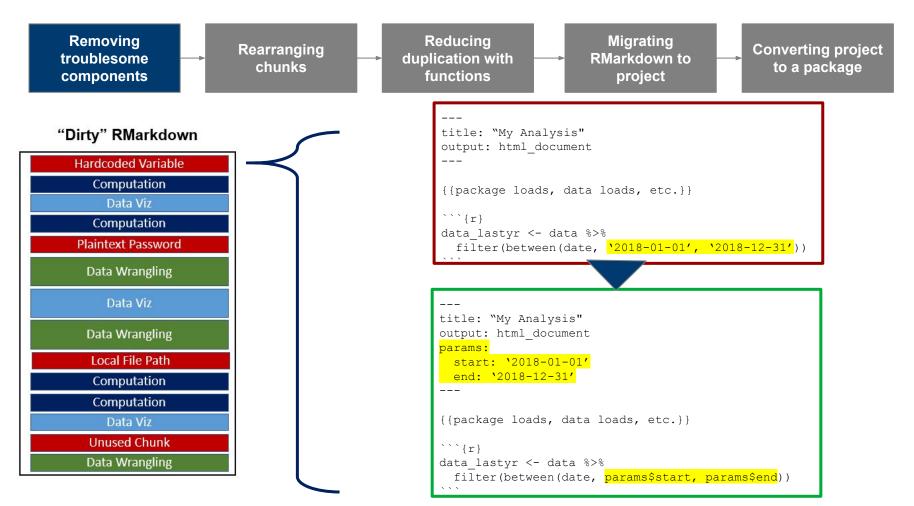
RmdDD has multiple endpoints, so you can take the right exit ramp for your destination



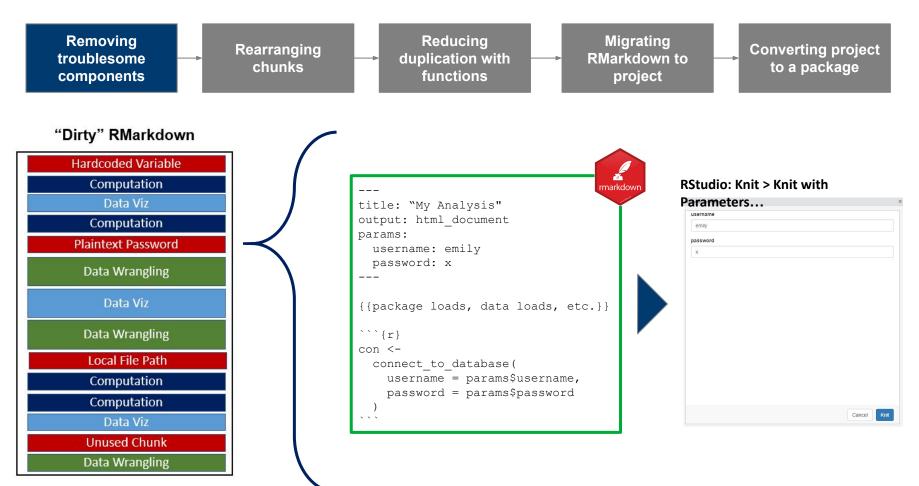
Eliminate clutter to make your own code more trustworthy for its initial use



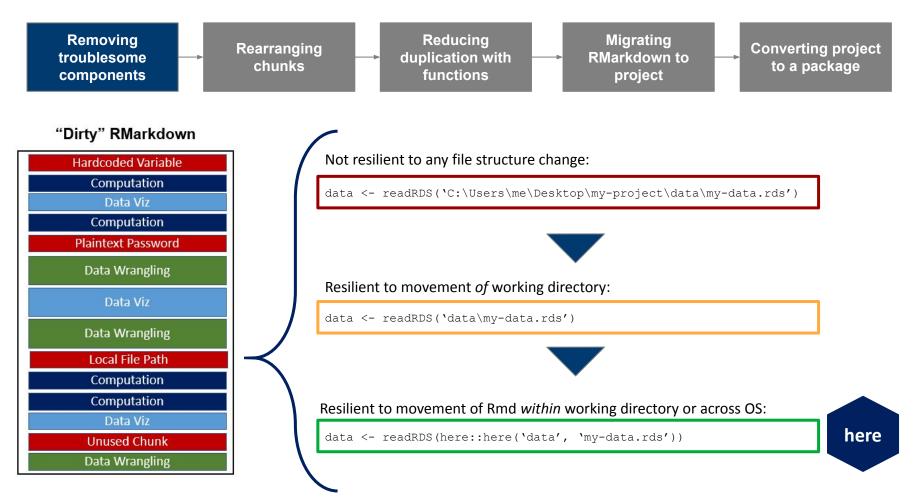
Parameters can protect the integrity of your analysis and your credentials



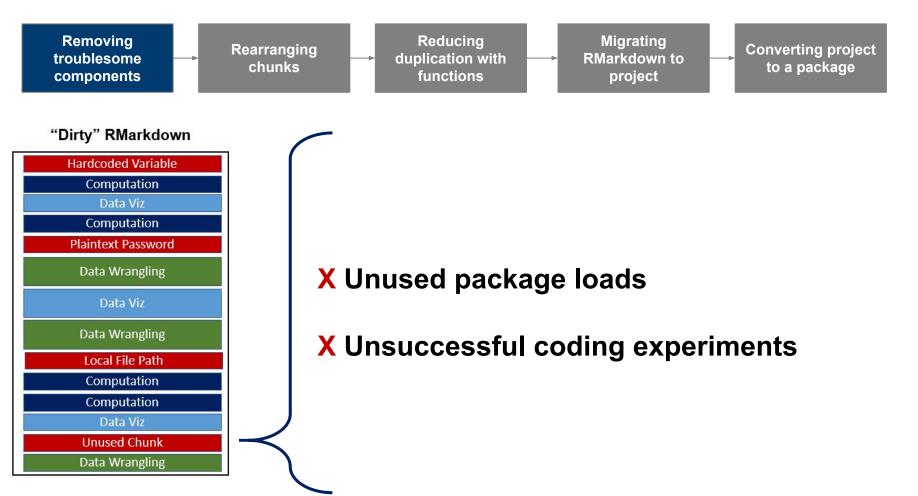
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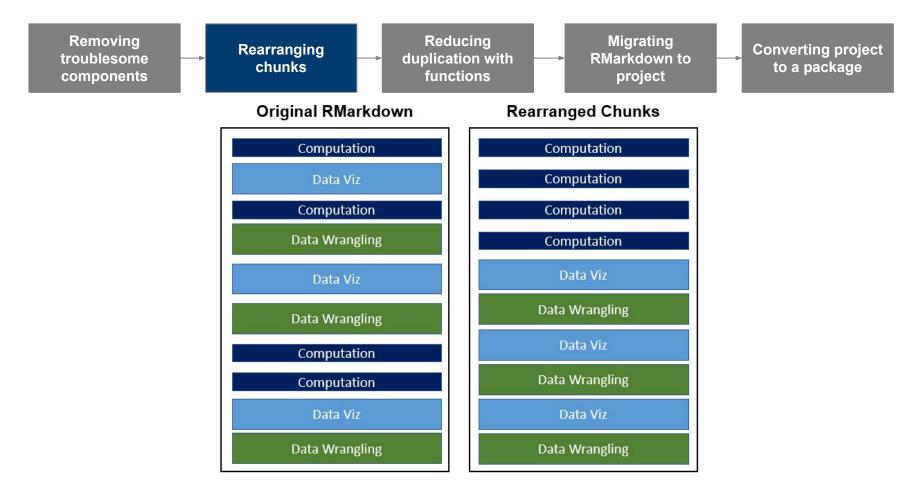
Local file paths nearly guarantee that your project will not work on someone else's machine



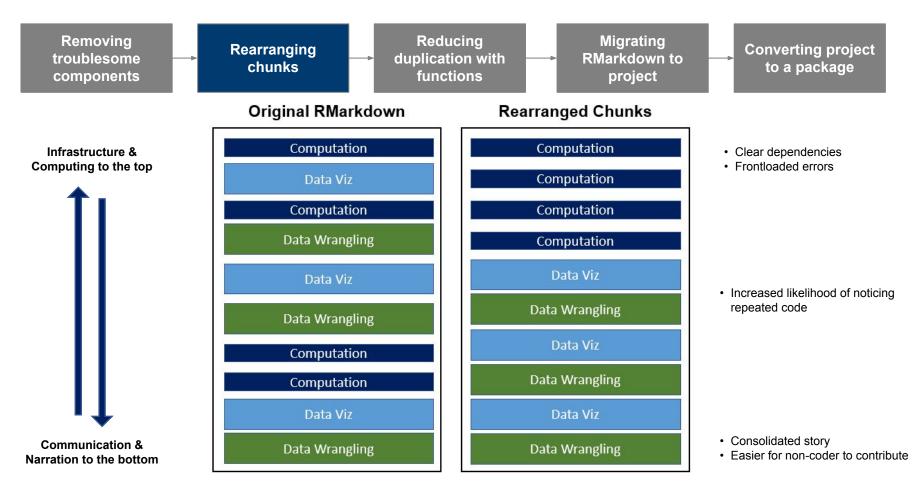
Don't let your script become a junk drawer



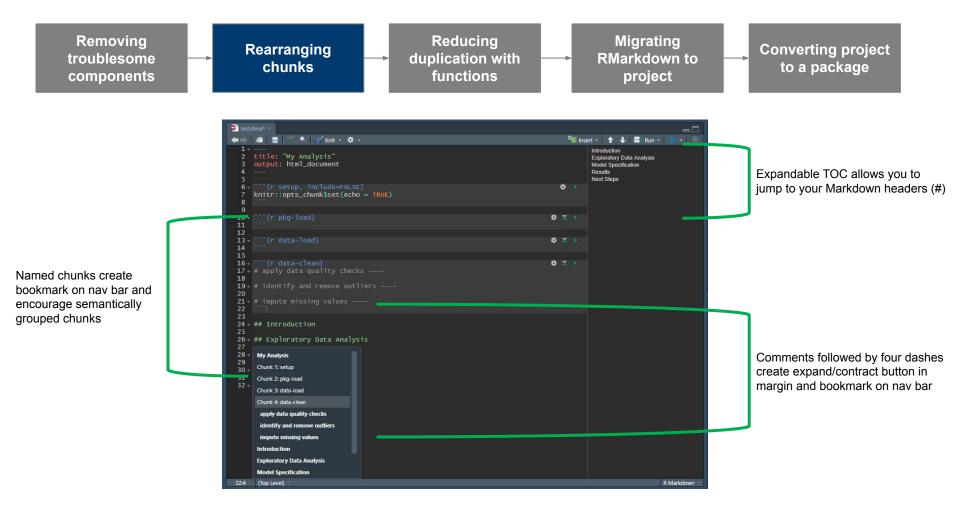
RMarkdown is (too) good at capturing our non-linear thought processes



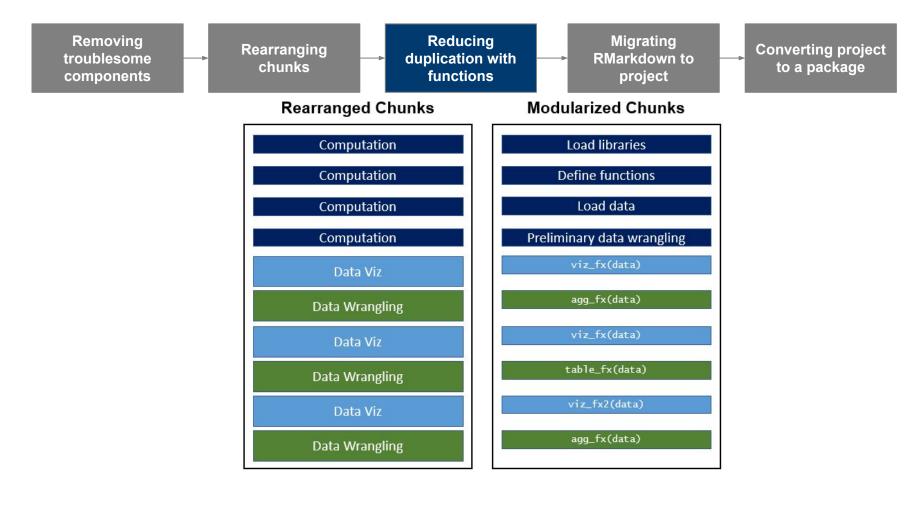
Clustering quantitative and narrative components makes both easier to iterate on



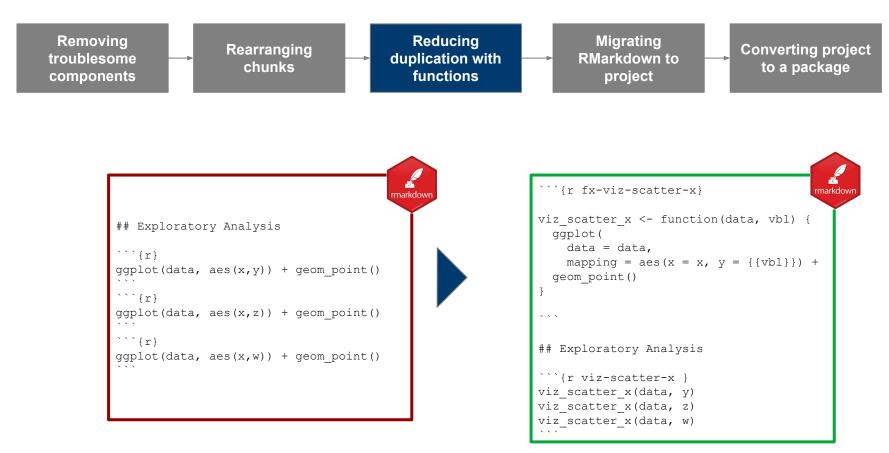
Enhance the navigability of your file in RStudio with chunk names and special comments



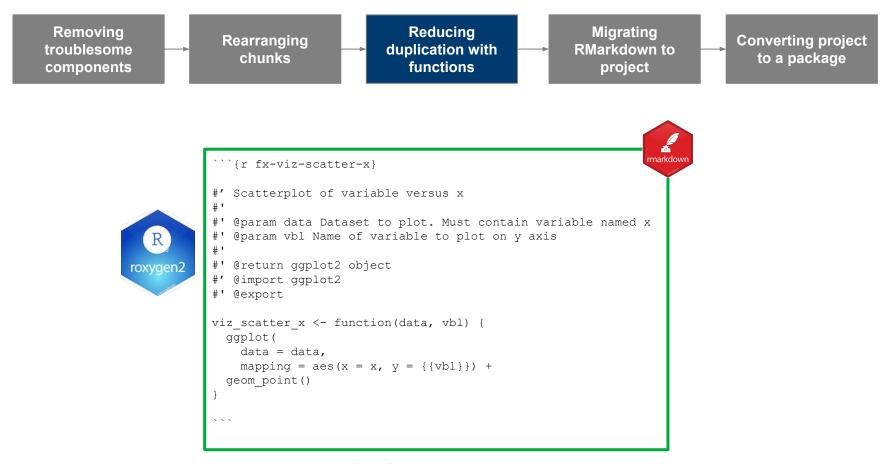
Writing functions eliminates duplication and increases code readability



Writing functions eliminates duplication and increases code readability



roxygen2 function documentation can give your script a package-like understandability

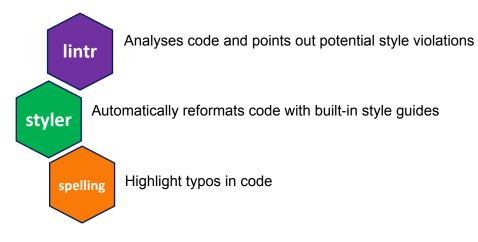


RStudio: Ctrl + Alt + Shift + R for skeleton

Get a virtual second pair of eyes on your polished single-file RMarkdown



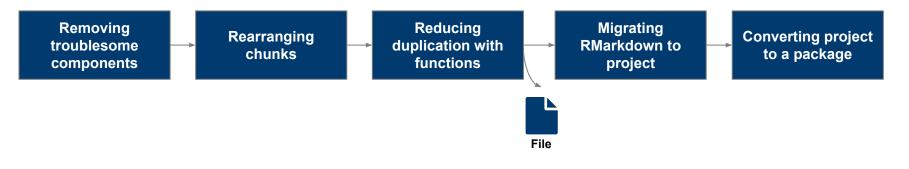
Automatically find areas of improvement with lintr, styler, and spelling



> lintr::lint(`customer-profile.Rmd')

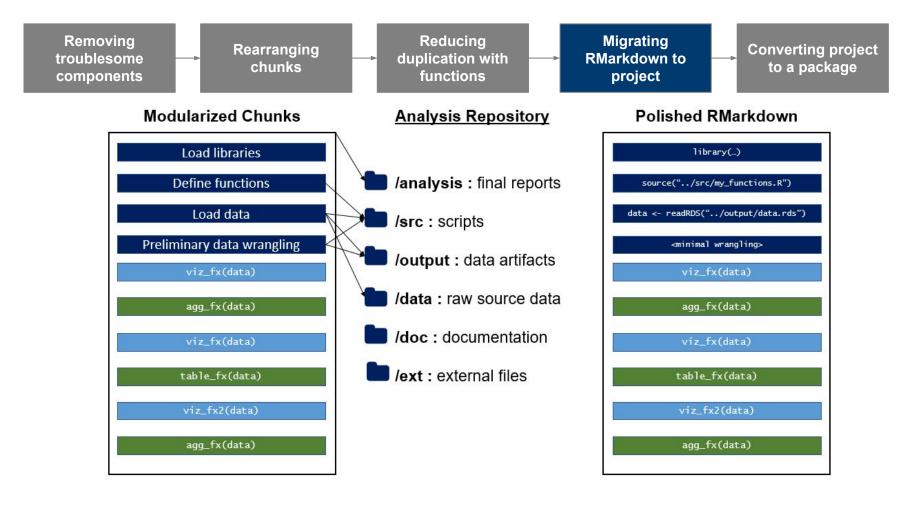
Console Ter	minal × R Markdown × Markers × Jobs ×
lintr +	
~/customer-p	rofile.Rmd
S Line 7	lines should not be more than 80 characters.
S Line 15	
S Line 22	
S Line 23	Commented code should be removed.
S Line 24	
S Line 25	
S Line 26	
S Line 27	Commented code should be removed.
S Line 28	Commented code should be removed.
S Line 29	Commented code should be removed.
S Line 30	Commented code should be removed.
S Line 31	
S Line 33	Only use double-quotes.
S Line 36	Commas should always have a space after.
S Line 36	Commas should always have a space after.
S Line 36	
S Line 36	Commas should always have a space after.
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S Line 36	Commas should always have a space after.
S Line 36	Commas should always have a space after.
S Line 37	lines should not be more than 80 characters.
S Line 37	Only use double-quotes.
S Line 37	Only use double-quotes.
📀 Line 39	Trailing whitespace is superfluous.

A polished single-file RMarkdown can be a very practical end-state for maximum portability

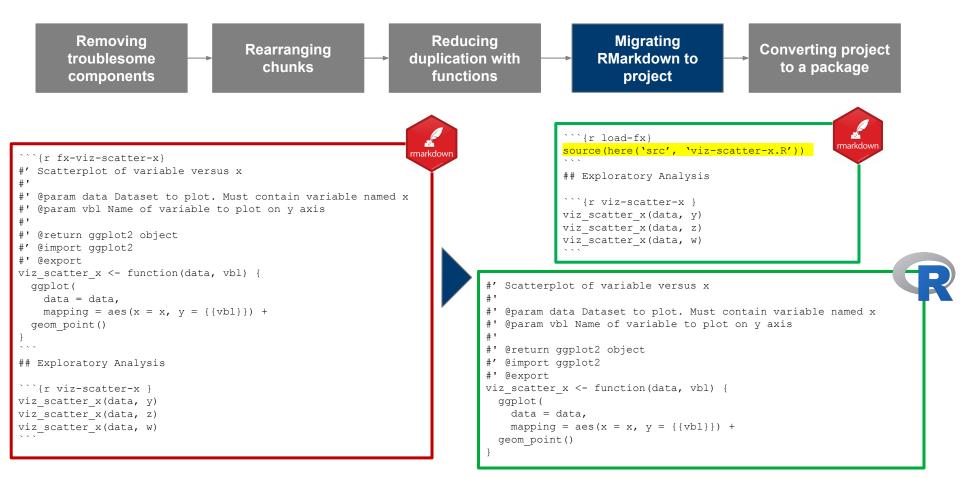


	Benefits	Pitfalls
Standalone File	 Portable without formal repository Easy to compare versions with diffs without formal version control One-push execution / refresh 	 Can be lengthy, monolithic, and intimidating Potentially slow to run and relies on RMarkdown to play role of job scheduler Enables antipatterns (e.g. not saving artifacts)

Projects modularize components and make it easy to access individual project assets

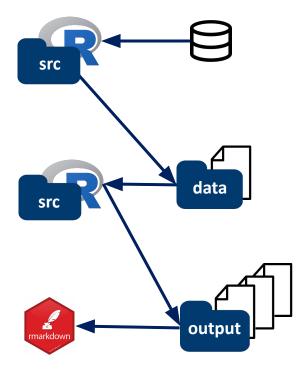


The source () function enables us to execute R code from another script



Pre-processing data decreases external system dependencies and knitting time



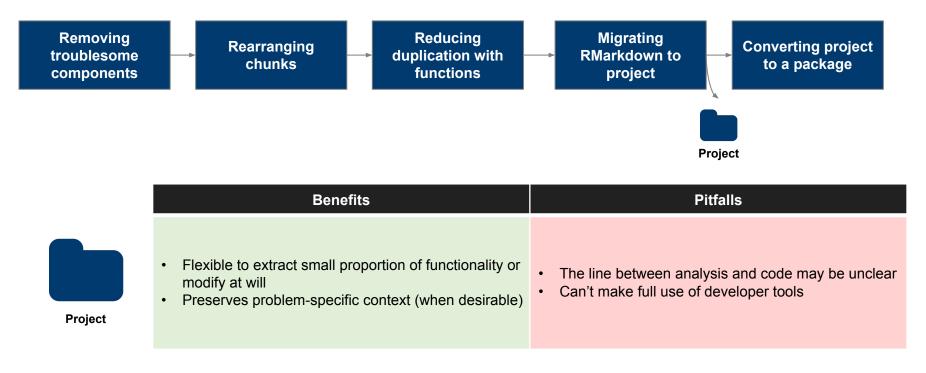


Load data outside of Rmd to eliminate dependence on API, Database, etc. being 'up' when need to knit

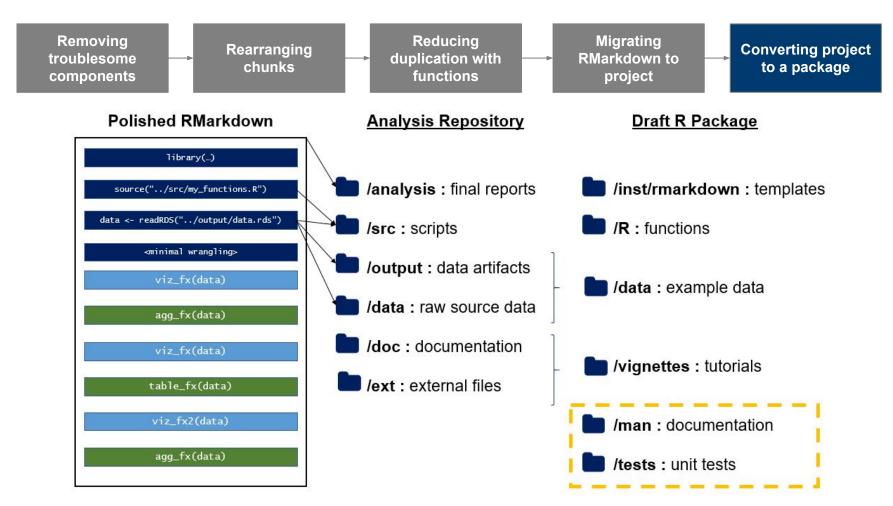
Store 'raw' data for posterity and reproducibility

Store analytical artifacts (e.g. lean models, aggregate data) to read in to final report

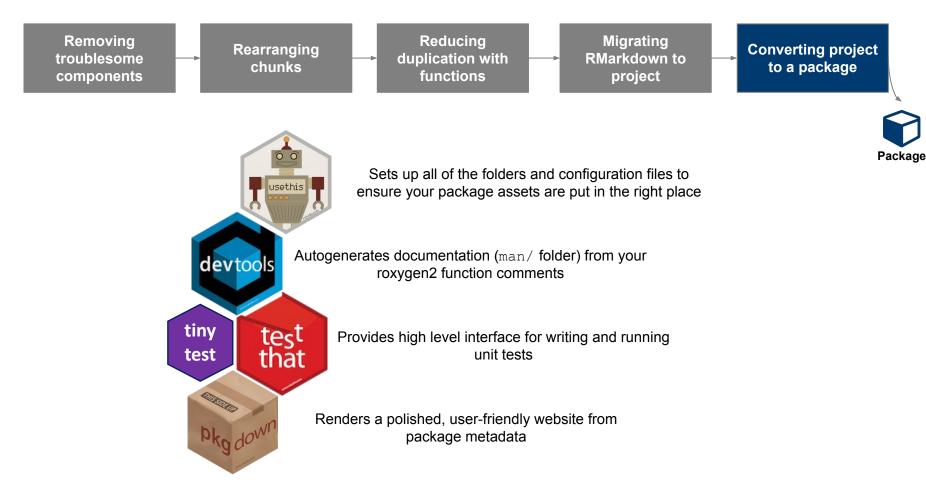
R projects preserve problem-specific context while making it easy to reapply components



There is a near one-to-one mapping between the components of a project and a package



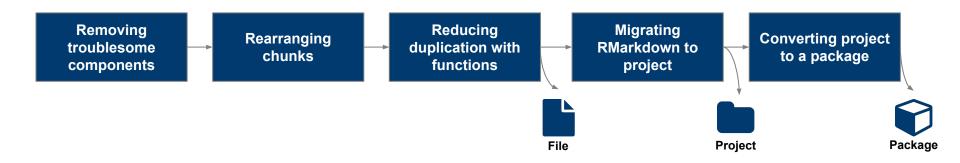
Developer tools exist to help us create everything we need - and more!



Different stopping points optimize for recreation versus extension of your work

	Benefits	Pitfalls	
Standalone File	 Portable without formal repository Easy to compare versions with diffs without formal version control One-push execution / refresh 	 Can be lengthy, monolithic, and intimidating Potentially slow to run and relies on RMarkdown to play role of job scheduler Enables antipatterns (e.g. not saving artifacts) 	Specific Instance
Project	 Flexible to extract small proportion of functionality or modify at will Preserves problem-specific context (when desirable) 	 The line between analysis and code may be unclear Can't make full use of developer tools 	
Package	 Formal mechanisms for distributing at scale (e.g. CRAN) Familiar format for others to learn and use 	 May be too narrowly focused and inflexible if built towards specific project Potentially more challenging to extract specific features from for interactive use 	Generic Class

No matter what path you chose, your RMarkdown analysis is closer to a sustainable and empathetic data product than you may think!

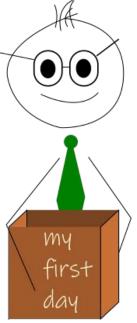


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3. Packages are more than functions on CRAN	R Packa
4. Packages can play many roles in an organization	Organiza

wn Driven pment

> ages in zations





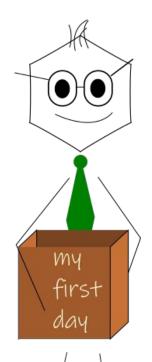
data access server connection proxies, ssh, ssl right problems tribal knowledge intuition

team norms meetings communication

my first dav

data access server connection proxies, ssh, ssl right problems tribal knowledge intuition

team norms meetings communication



Internal Packages

Open Source Packages

Specific

Problem Definition



Workflow

Internal Packages





Abstract

Solution Breadth

Task

Specific

utilities packages

data access server connection proxies, ssh, ssl

e.g. abstraction layer for infrastructure

analysis packages

right problems tribal knowledge intuition

e.g. curated workflow, tailored function calls, automated result generation

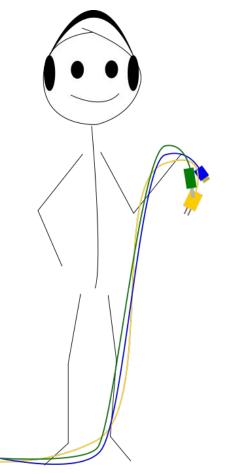
developer tools

team norms meetings communication

e.g. color palettes, Shiny modules, linters, git hooks

hw

The IT Guy

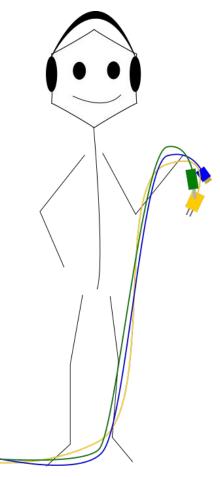


functional handle quirks of infrastructure

SOCIA promote or enforce good practices

emotional avoid frustration or stress of time lost

The IT Guy



functional handle quirks of infrastructure

SOCIA promote or enforce good practices

-> utility functions

-> opinionated design

emotional avoid frustration or stress of time lost

-> helpful error messages

get_database_conn <- function(username, password) {</pre>

```
conn <-
DBI::dbConnect(
    drv = odbc::odbc(),
    driver = {driver name},
    server = {server},
    UID = username,
    PWD = password,
    port = {port number}
)</pre>
```

get_database_conn <- function(username, password) {</pre>

```
conn <-
DBI::dbConnect(
    drv = odbc::odbc(),
    driver = {driver name},
    server = {server},
    UID = Sys.getenv("DB_USER") username,
    PWD = Sys.getenv("DB_PASS") password,
    port = {port number}
)</pre>
```

```
get_database_conn <- function() {</pre>
```

```
if (any(Sys.getenv(c("DB_USER", "DB_PASS")) == "")) {
 stop(
    "DB_USER or DB_PASS environment variables are missing.",
    "Please read set-up vignette to configure your system."
conn <-
 DBI::dbConnect(
    drv = odbc::odbc(),
    driver = {driver name},
    server = {server},
    UID = Sys.getenv("DB_USER"),
    PWD = Sys.getenv("DB_PASS"),
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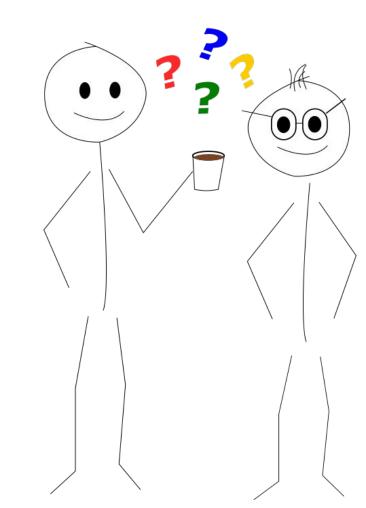
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if (any(Sys.getenv(c("DB_USER", "DB_PASS")) == "")) {
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conn <-
 DBI::dbConnect(
    drv = odbc::odbc(),
    driver = {driver name},
    server = {server},
    UID = Sys.getenv("DB_USER"),
    PWD = URLencode(Sys.getenv("DB_PASS"), reserved = TRUE),
    port = {port number}
```

The Junior Analyst / Trainee

functional perform work with reasonable assumptions

SOCIA flexible to feedback, trying new things

emotional builds trust so you can focus on other things



The Junior Analyst / Trainee

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-> default arguments -> reserved keywords -> ellipsis viz_cohort <- function(data, time, metric, group) {</pre>

```
gg <-
ggplot(data) +
aes(x = .data[[time]],
    y = .data[[metric]],
    group = .data[[group]]) +
geom_line() +
my_org_theme()
return(gg)</pre>
```

viz_cohort <- function(data, time, metric, group) {</pre>

```
gg <-
ggplot(data) +
aes(x = .data[["MONTHS_SUBSCRIBED"]],
    y = .data[[metric]],
    group = .data[[group]]) +
geom_line() +
my_org_theme()
return(gg)</pre>
```

```
viz_cohort <- function(data,</pre>
                        metric = "IND_ACTIVE",
                        time = "MONTHS_SUBSCRIBED",
                        group = "COHORT") {
  gg <-
    ggplot(data) +
    aes(x = .data[[time]],
        y = .data[[metric]],
        group = .data[[group]]) +
    geom_line() +
    my_org_theme()
  return(gg)
```

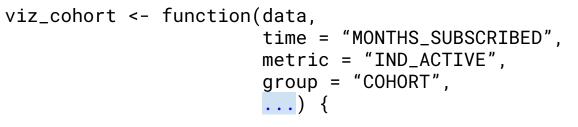
```
viz_cohort <- function(data,</pre>
                        metric = "IND_ACTIVE",
                        time = "MONTHS_SUBSCRIBED",
                        group = "COHORT") {
  gg <-
    ggplot(data) +
    aes(x = .data[[time]],
        y = .data[[metric]],
        group = .data[[group]]) +
    geom_line() +
    my_org_theme()
  return(gg)
                                                         Reserved Keywords:
                                                         TIME_SUBSCRIBED
                                                         CUSTOMER_COHORT
                                                         CUSTOMER_SEGMENT
                                                         . . .
```

```
return(gg)
```

geom_line(aes(...)) +

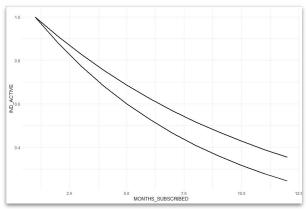
my_org_theme()

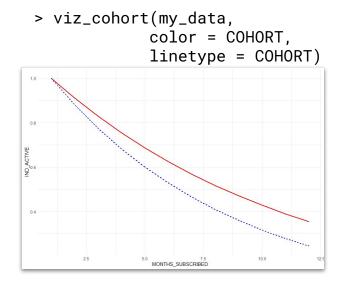
> viz_cohort(my_data)



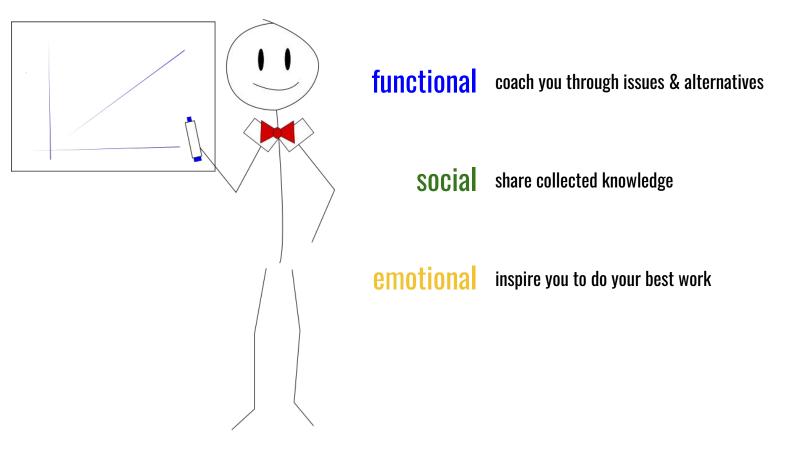
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return(gg)

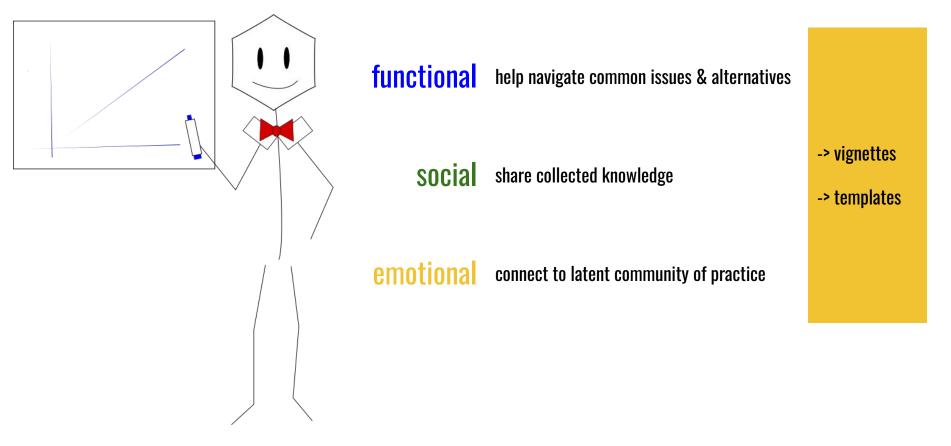




The Tech Lead / Principal Investigator



The Tech Lead / Principal Investigator



Concordance

Terry Therneau, Elizabeth Atkinson

September 25, 2020

1 The concordance statistic

Use of the concordance statistic for Cox models was popularized by most used measure of goodness-off in survival models. One advait is well defined not just for survival models, but also for logistic at In general let y_i and x_i be observed and predicted data values, in the linear predictor from a fitted model. The concordance is defiprobability that the prediction x_i goes in the same direction as the observations i_i is considered concordant if the prediction and the i.e. $(y_i > y_j, x_i > x_j)$ or $(y_i < y_j, x_i < x_j)$. The concordance is the For a Cox model remember that the predicted survival j is longer so we have to flip the definition of concordant and discordant. Fo use the usual definition for exposition.

One wrinkle is what to do with ties in either y or x. Such pairs (treated as incomparable), treated as discordant, or given a score T_{xy} be a count of the pairs that are concordant, discordant, and tie y), tied on y (but not x), and tied on both. Then

$$\begin{split} \tau_a &= \frac{C-D}{C+D+T_x+T_y+T_{xy}}\\ \tau_b &= \frac{C-D}{\sqrt{(C+D+T_x)(C+D+T_y)}}\\ \gamma &= \frac{C-D}{C+D}\\ d &= \frac{C-D}{C+D+T_x} \end{split}$$

1

• Kendall's tau-a (1) is the most conservative; essentially treati

The Goodman-Kruskal γ statistic (3) ignores ties in either y

 Somers' d (4) treats ties in y as incomparable; pairs that are 1/2. The AUC measure commonly used in logistic regression

All three of the above range from -1 to 1. The concordance is (d +

Method Overview (survival)

Crash course (dplyr)

Introduction to dplyr

When working with data you must:

- · Figure out what you want to do.
- Describe those tasks in the form of a computer program
- Execute the program.
- The dplyr package makes these steps fast and easy.
- By constraining your options, it helps you think about your data manipulation challenges.
- It provides simple "verbs", functions that correspond to the most common data manipulation tasks, to help
 you translate your thoughts into code.
- · It uses efficient backends, so you spend less time waiting for the computer.

This document introduces you to dplyr's basic set of tools, and shows you how to apply them to data frames. dplyr also supports databases via the dbplyr package, once you've installed, read vignette("dbplyr") to learn more.

Data: starwars

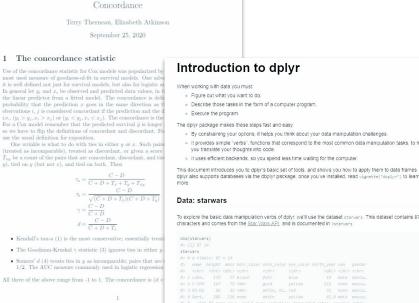
To explore the basic data manipulation verbs of dplyr, we'll use the dataset stankars. This dataset contains 87 characters and comes from the <u>Star Wars API</u>, and is documented in Pstarwars

45		1] 87 .	14							
sta	iri	wars								
#>	#	A tib	ble: 87	x 14						
#>		name	height	mass	hair_color	skin_color	eye_color	birth_year	sex	gender
#>		<chr>></chr>	<int></int>	<dbl></dbl>	<chr></chr>	<chr></chr>	<chr></chr>	<dbl></dbl>	<chr></chr>	<chr>></chr>
#>	1	Luke	172	77	blond	fair	blue	19	male	mascu
#>	2	C-3P0	167	75	<na></na>	gold	yellow	112	none	mascu
#>	3	R2-D2	96	32	<na></na>	white, bl	red	33	none	mascu
#>	4	Dart.	202	136	none	white	yellow	41.9	male	mascu
#>	#	with	h 83 mor	e row	s, and 5 mo	re variable	s: homewor	Ld <chr>, s</chr>	oecies	<chr>,</chr>
±5	#	4411	ne diet	ES SIM	hicles dis	t>, starshi	as dists			

Note that stansars is a tibble, a modern reimagining of the data frame. It's particularly useful for large datasets because it only prints the first tew rows. You can learn more about tibbles at <u>http://tibble.tidyverse.org</u>; in particular you can convert data frames to tibbles with ss_tible().

Single table verbs

dplyr aims to provide a function for each basic verb of data manipulation. These verbs can be organised into three categories based on the component of the dataset that they work with:



- . By constraining your options, it helps you think about your data manipulation challenges.
- It provides simple "verbs", functions that correspond to the most common data manipulation tasks, to help

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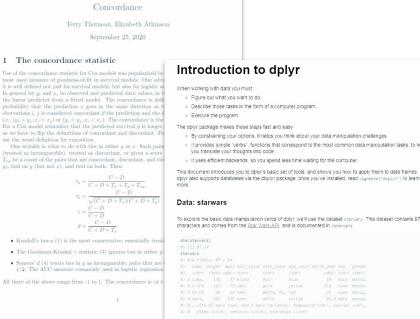
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Conceptual Overview

Workflow & Key Questions

Process Documentation



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	tibble: 8	7 x 14						
#> n	ane heigh	t mass		skin_color		birth_year		gender
#> <						<dbl></dbl>		
#> 1 L	uke 17				blue	19	male	mascu
#> 2 C			<na></na>	gold	yellow		none	mascu
#> 3 R	2-D2 5	6 32	<na></na>	white, bl.			none	mascu
#> 4 D				white	yellow	41.9	male	mascu

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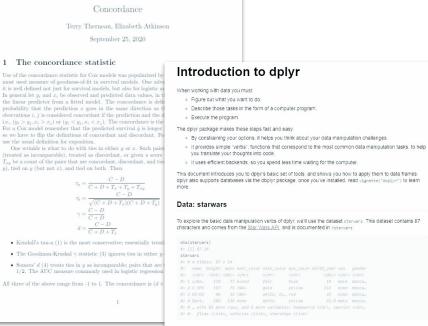
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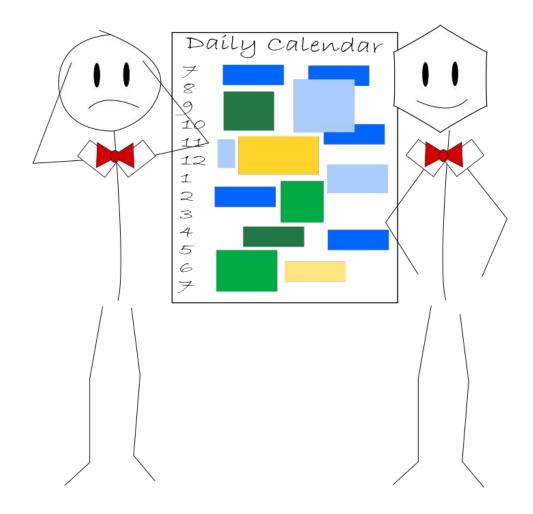
Lessons Learned

Past Examples

Expand your reach with pkgdown

> pkgdown::build_site()

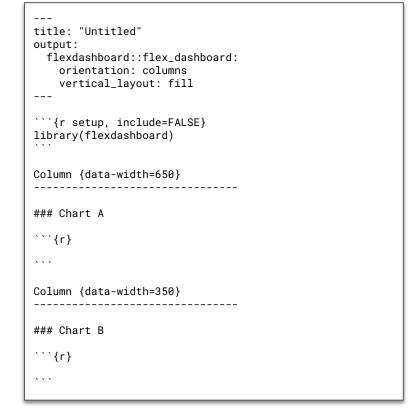
pkgdown 1.6.1 A Get started Reference	Articles - News -	Search	0
Introduction to pkgdown	Auto-linking Search Metadata	Contents Metadata	
The goal of pkgdown is to make it easy to make an elegant and website up and running in just a couple of minutes:	More ruserur package weusite with a minimum of work. You can get a basic	Home page Reference	
<pre># Run once to configure package to use pkgdown usethis::use_pkgdown() # Run to build the website pkgdown::build_site()</pre>		Articles News Publishing Promoting	
 While you'll get a decent website without any additional work, it vignette. It works through the main components of a pkgdown with the main components of a pkgdown with the main components. The page 3. Function reference 4. Articles 5. News 	you want a website that really pops, you'll need to read the rest of this vebsite:		
Metadata			
You can override pkgdown's defaults with a YAML file calledr build_site() and include:	$kgdown,yml^1.$ Options that affect the entire site are documented in		
• A bootswatch theme that affects the overall appearance	of the whole site.		
template: params: bootswatch: cerulean			
A Google analytics user ID if you want to track the people	e who are using your site		



Templates as coach

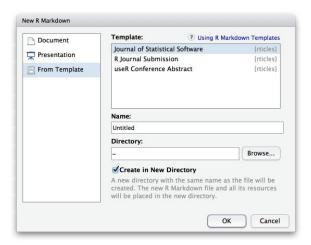
Structure

(flexdashboard)



Document	Template: Using R Markdown Temp				
-	Journal of Statistical Software {rticles}				
Presentation	R Journal Submis	{rticles}			
From Template	useR Conference	Abstract	{rticles}		
	Name:				
	Directory:				
	~		Browse		
	Create in New Directory				
	created. The new	with the same name as the file will be v R Markdown file and all its resources the new directory.			

Templates as coach



Process walk-through

title: "Data Validation"
output: html_document

Censored Data

Run the following code to visualize how many observations were censored. Depending on what you find you will want to...

```{r censored}

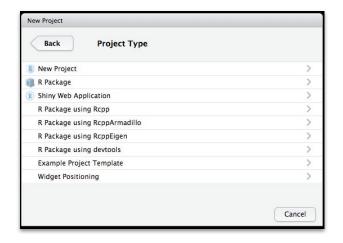
### Analysis outline

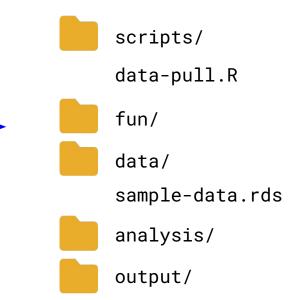
#### ---

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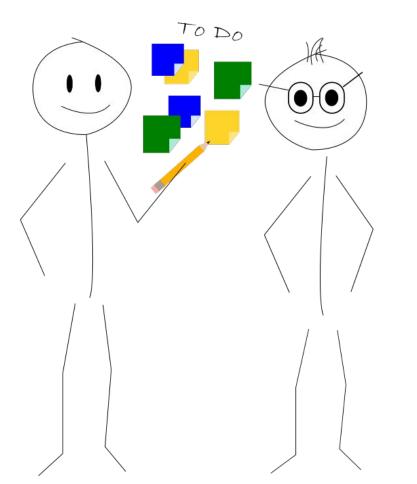
title: "Final Report"
output: html\_document
params:
 month: September
--## Final Report
TODO: UPDATE COMMENTARY SUMMARIZING TRENDS
````{r dashboard}

Templates as code reviewer





Collaboration



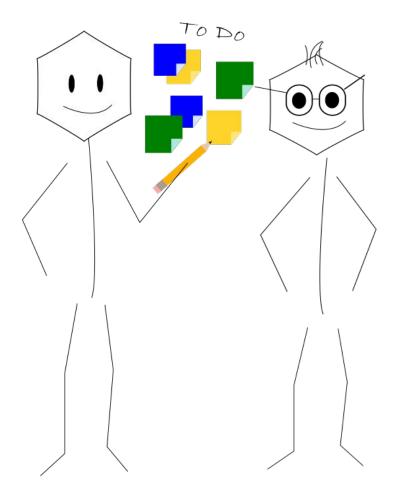
functional clear communication

SOCIA keeps promises



confident yet engaged

Collaboration



functional clear communication

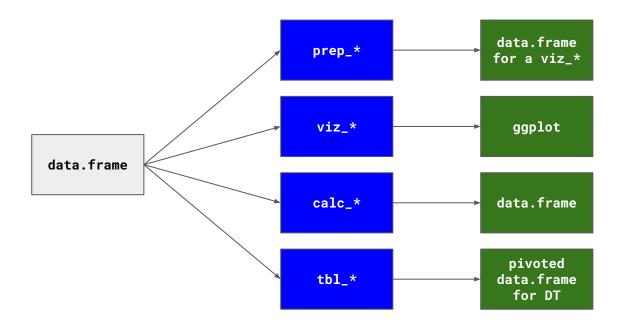
SOCIA keeps promises

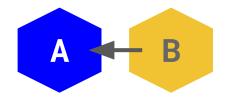
-> naming -> dependencies -> testing

emotional confid

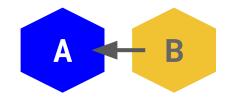
confident yet engaged

Clear communication

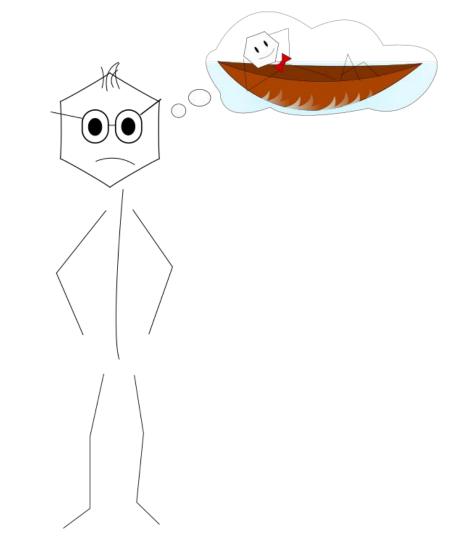


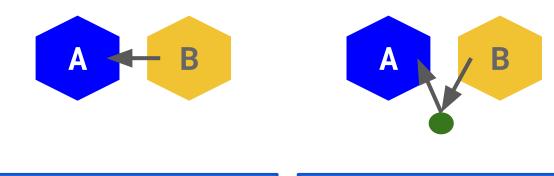


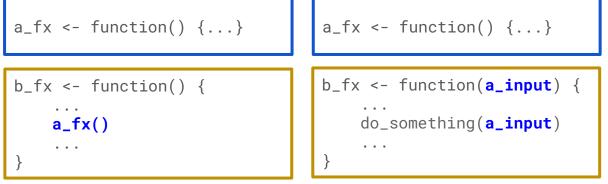
Direct Dependency



Direct Dependency

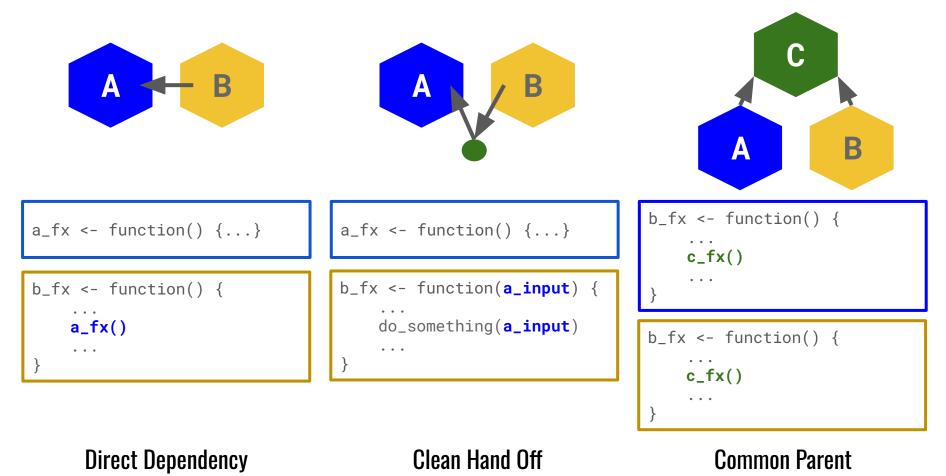




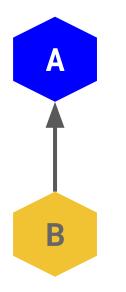


Direct Dependency

Clean Hand Off



Typical unit test with dependency



b/tests/testthat/test-pkga.R test_that("Receives input correctly from a", expect_error(fxb(fxa(1)), NA)

Integration tests

```
a/tests/testthat/test-pkgb.R
                                              b/tests/testthat/test-pkga.R
                                         test_that(
test_that(
  "Preps input correctly for b",
                                           "Receives input correctly from a",
 expect_error(fxb(fxa(1)), NA)
                                          expect_error(fxb(fxa(1)), NA)
```

Key career realizations

- 1. R Markdown is the gateway to more powerful tools
- 2. Good workflows provide an incredible amount of leverage
- 3. Packages are more than functions on CRAN
- 4. Packages can play many roles in an organization

Building tools is an increasingly important skill in data science

Lead Data Scientist - Ecolab

What You Will Do

- Actively engage with internal business teams to understand supply chain challenges and deliver robust, data driven solutions.
- · Lead ongoing analytics delivery of currently deployed products, live with our field.
- Work alongside global counterparts to solve data-intensive problems using standard analytical frameworks and tools.
- Be encouraged and expected to innovate and be creative in your data analysis, problem solving and presentation of solutions.
- Network and collaborate with a broad range of internal business stakeholders to define and deliver joint solutions.
- Leverage cutting edge technology to creatively solve problems and disrupt existing business models.

Principal Data Scientist - Starbucks

The decision scientist principal is primarily responsible for analyzing HR metrics with the goal toward building solutions that foster a culture of inclusion. Provides thought leadership for the I&D team and partners with PRO, Analytics & Insights and Legal to understand business objectives and how HR data can enable the business to achieve commitments in support of the enterprise I&D strategy. We are looking for someone with deep level of subject matter expertise in predictive analytics and with the ability to implement I&D solutions using HR data and analytics that can facilitate business decisions. This role will be a solid line on the I&D team but sit with the Analytics & Insights teams to deliver the long-term I&D strategy working collaboratively to build and deploy analytic solutions that can then be transitioned into new frameworks and organizational practices.

Data Scientist - Twitch

About The Position

Data is central to Twitch's decision-making process, and analysts are essential to promoting data-driven decision-making in all of our operations. As an analyst at Twitch, you will structure our team's data to inform the way we build and refine operational processes, delivering community insights that influence the way Twitch products are built, and measuring the user sentiment of policy. You will determine what questions should be asked, and scale analytics methods and tools to support our growing business, leading the way for high-quality, high velocity decisions for your team.

Staff Data Scientist - Twitter

Qualifications

- Advanced degree in a quantitative field and 5+ years of experience (or 7+ years of experience)
- Strong track record of forming effective cross-functional partnerships
- Experience using data science to meaningfully impact product strategy and execution
- Expertise solving complex and highly impactful quantitative business problems with at least one scripting language (Python, R, etc.) and SQL
- Experience with one or more of the following in an applied setting developing statistical frameworks to understand customers and their behaviors, advanced statistical techniques for A/B testing, methods for experimental design, causal inference, or quasi-experimental analysis
- · [Bonus] Ability to create/improve reproducible analysis libraries
- [Bonus] Experience with PySpark or BigQuery
- [Bonus] Software engineering experience in a production environment, especially for relevance/ranking systems

Inspirations

Big Ideas:

- Good Enough Practices in Scientific Computing
- Opinionated Analysis Development
- << Anything from the R community with the word "workflow">>

Applications:

- <u>Understanding the InnerSource Checklist</u>
- rOpenSci Packages: Development, Maintenance, and Peer Review
- How R Helps AirBnb Make the Most of Its Data