

# Data Visualization in R

1. Overview



Michael Friendly SCS Short Course Sep/Oct, 2018

http://datavis.ca/courses/RGraphics/



-#-

### **Outline: Session 1**

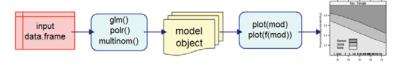
- Session 1: Overview of R graphics, the big picture
  - Getting started: R, R Studio, R package tools
  - Roles of graphics in data analysis
    - Exploration, analysis, presentation
  - What can I do with R graphics?
    - Anything you can think of!
    - Standard data graphs, maps, dynamic, interactive graphics we'll see a sampler of these
    - R packages: many application-specific graphs
  - Reproducible analysis and reporting
    - knitr, R markdown
    - R Studio

## Course outline

- 1. Overview of R graphics
- 2. Standard graphics in R
- 3. Grid & lattice graphics
- 4. ggplot2

## Outline: Session 2

- Session 2: Standard graphics in R
  - R object-oriented design



- Tweaking graphs: control graphic parameters
  - Colors, point symbols, line styles
  - Labels and titles
- Annotating graphs
  - Add fitted lines, confidence envelopes

## Outline: Session 3

#### Session 3: Grid & lattice graphics

- Another, more powerful "graphics engine"
- All standard plots, with more pleasing defaults
- Easily compose collections ("small multiples") from subsets of data
- vcd and vcdExtra packages: mosaic plots and others for categorical data

Lecture notes for this session are available on the web page

#### **Outline: Session 4**

- Session 4: ggplot2
  - Most powerful approach to statistical graphs, based on the "Grammar of Graphics"
  - A graphics language, composed of layers, "geoms" (points, lines, regions), each with graphical "aesthetics" (color, size, shape)
  - part of a workflow for "tidy" data manipulation and graphics

#### **Resources: Books**



Paul Murrell, *R Graphics*, 2nd Ed.

Covers everything: traditional (base) graphics, lattice, ggplot2, grid graphics, maps, network diagrams, ... R code for all figures: <u>https://www.stat.auckland.ac.nz/~paul/RG2e/</u>



Winston Chang, *R Graphics Cookbook: Practical Recipes for Visualizing Data* Cookbook format, covering common graphing tasks; the main focus is on ggplot2 R code from book: <u>http://www.cookbook-r.com/Graphs/</u> Download from: <u>http://ase.tufts.edu/bugs/guide/assets/R%20Graphics%20Cookbook.pdf</u>



Deepayn Sarkar, Lattice: Multivariate Visualization with R R code for all figures: http://lmdvr.r-forge.r-project.org/



Hadley Wickham, ggplot2: Elegant graphics for data analysis, 2nd Ed. 1st Ed: Online, <u>http://ggplot2.org/book/</u> ggplot2 Quick Reference: <u>http://sape.inf.usi.ch/quick-reference/ggplot2/</u> Complete ggplot2 documentation: <u>http://docs.ggplot2.org/current/</u>

#### Resources: cheat sheets

R Studio provides a variety of handy cheat sheets for aspects of data analysis & graphics See: <u>https://www.rstudio.com/resources/cheatsheets/</u>



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### Getting started: Tools

• To profit best from this course, you need to install both R and R Studio on your computer



The basic R system: R console (GUI) & packages Download: <u>http://cran.us.r-project.org/</u> Add my recommended packages: source(<u>"http://datavis.ca/courses/RGraphics/R/install-pkgs.R"</u>)



The R Studio IDE: analyze, write, publish Download: https://www.rstudio.com/products/rstudio/download/ Add: R Studio-related packages, as useful



#### R package tools



**Data prep**: Tidy data makes analysis and graphing much easier. Packages: tidyverse, comprised of: tidyr, dplyr, lubridate, ...





**R graphics**: general frameworks for making standard and custom graphics Graphics frameworks: base graphics, lattice, ggplot2, rgl (3D) Application packages: car (linear models), vcd (categorical data analysis), heplots (multivariate linear models)

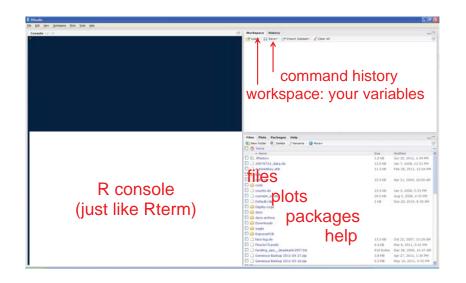


**Publish**: A variety of R packages make it easy to write and publish research reports and slide presentations in various formats (HTML, Word, LaTeX, ...), all within R Studio



**Web apps**: R now has several powerful connections to preparing dynamic, webbased data display and analysis applications.

## Getting started: R Studio



## **R** Studio navigation

#### R folder navigation commands:

- Where am I? > getwd() [1] "C:/Dropbox/Documents/6135"
- Go somewhere:
  - > setwd("C:/Dropbox")
    > setwd(file.choose())

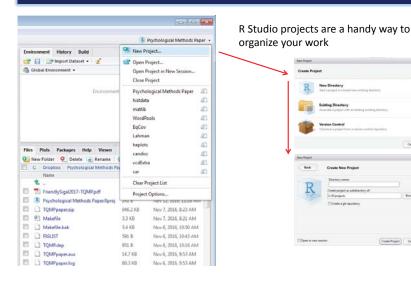
#### R Studio GUI

Take R to your preferred directory ()



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## R Studio projects



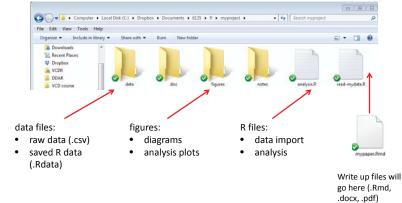
## R Studio projects

An R Studio project for a research paper: R files (scripts), Rmd files (text, R "chunks")

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## Organizing an R project

- Use a separate folder for each project
- Use sub-folders for various parts



## Organizing an R project

- Use separate R files for different steps:
  - Data import, data cleaning, ... → save as an RData file
  - Analysis: load RData, ...

#### read-mydata.R

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# read the data; better yet: use RStudio File -> Import Dataset ... mydata <- read.csv("data/mydata.csv")</pre>

# data cleaning ....

# save the current state
save("data/mydata.RData")

#### Organizing an R project

- Use separate R files for different steps:
  - Data import, data cleaning,  $\dots \rightarrow$  save as an RData file
  - Analysis: load RData, ...

#### analyse.R

# analysis
load("data/mydata.RData")

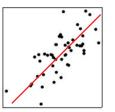
# do the analysis – exploratory plots plot(mydata)

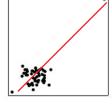
# fit models
mymod.1 <- lm(y ~ X1 + X2 + X3, data=mydata)</pre>

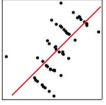
# plot models, extract model summaries
plot(mymod.1)
summary(mymod.1)

## Graphics: Why plot your data?

- Three data sets with exactly the same bivariate summary statistics:
  - Same correlations, linear regression lines, etc
  - Indistinguishable from standard printed output







Standard data

r=0 but + 2 outliers

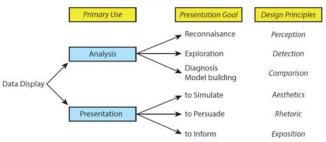
Lurking variable?

## Roles of graphics in data analysis

- Graphs (& tables) are forms of communication:
  - What is the audience?
  - What is the message?

Analysis graphs: design to see patterns, trends, aid the process of data description, interpretation **Presentation graphs**: design to attract attention, make a point, illustrate a conclusion

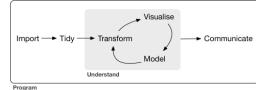
#### Basic functions of data display



#### The 80-20 rule: Data analysis

- Often ~80% of data analysis time is spent on data preparation and data cleaning
  - 1. data entry, importing data set to R, assigning factor labels,
  - 2. data screening: checking for errors, outliers, ...
  - 3. Fitting models & diagnostics: whoops! Something wrong, go back to step 1
- Whatever you can do to reduce this, gives more time for:
  - Thoughtful analysis,
  - Comparing models,
  - Insightful graphics,
  - Telling the story of your results and conclusions

This view of data analysis, statistics and data vis is now rebranded as "data science"

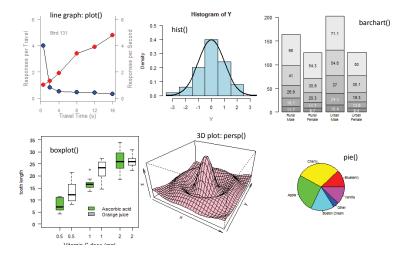


### The 80-20 rule: Graphics

- Analysis graphs: Happily, 20% of effort can give 80% of a desired result
  - Default settings for plots often give something reasonable
  - 90-10 rule: Plot annotations (regression lines, smoothed curves, data ellipses, ...) add additional information to help understand patterns, trends and unusual features, with only 10% more effort
- **Presentation graphs**: Sadly, 80% of total effort may be required to give the remaining 20% of your final graph
  - Graph title, axis and value labels: should be directly readable
  - Grouping attributes: visually distinct, allowing for BW vs color
    - color, shape, size of point symbols;
    - color, line style, line width of lines
  - Legends: Connect the data in the graph to interpretation
  - Aspect ratio: need to consider the H x V size and shape

## What can I do with R graphics?

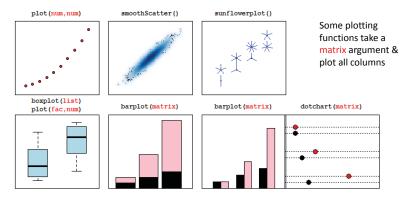
A wide variety of standard plots (customized)



### **Bivariate plots**

R base graphics provide a wide variety of different plot types for bivariate data

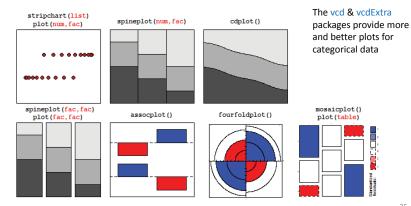
The function plot(x, y) is generic. It produces different kinds of plots depending on whether x and y are numeric or factors.



## **Bivariate plots**

A number of specialized plot types are also available in base R graphics

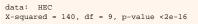
Plot methods for factors and tables are designed to show the association between categorical variables



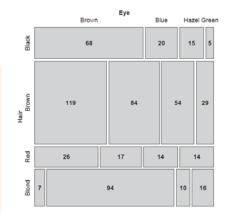
## Mosaic plots

Similar to a grouped bar chart Shows a frequency table with tiles, area ~ frequency

| > HEC   | - marg: |        |         | irEyeCol | or, 1:2) |
|---------|---------|--------|---------|----------|----------|
| 1       | Eye     |        |         |          |          |
| Hair    | Brown   | Blue   | Hazel   | Green    |          |
| Black   | 68      | 20     | 15      | 5        |          |
| Brown   | 119     | 84     | 54      | 29       |          |
| Red     | 26      | 17     | 14      | 14       |          |
| Blond   | 7       | 94     | 10      | 16       |          |
| > chisq | .test(1 | HEC)   |         |          |          |
|         | Pears   | on's ( | Chi-squ | uared te | st       |



How to understand the association between hair color and eye color?

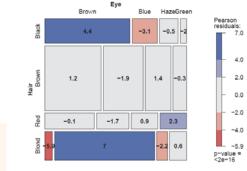


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## Mosaic plots

Shade each tile in relation to the contribution to the Pearson  $\chi^2$  statistic

$$\chi^{2} = \sum r_{ij}^{2} = \sum \frac{(o_{ij} - e_{ij})^{2}}{e_{ii}}$$



Mosaic plots extend readily to 3-way + tables They are intimately connected with loglinear models See: Friendly & Meyer (2016), Discrete Data Analysis with R, <u>http://ddar.datavis.ca/</u>



#### Follow along

• From the course web page, click on the script duncan-plots.R,

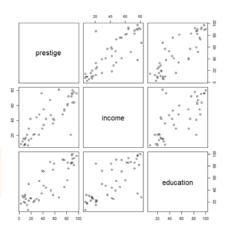
http://www.datavis.ca/courses/RGraphics/R/duncan-plots.R

- Select all (ctrl+A) and copy (ctrl+C) to the clipboard
- In R Studio, open a new R script file (ctrl+shift+N)
- Paste the contents (ctrl+V)
- Run the lines (ctrl+Enter) along with me

### Multivariate plots

The simplest case of multivariate plots is a scatterplot matrix – all pairs of bivariate plots

In R, the generic functions **plot()** and **pairs()** have specific methods for data frames

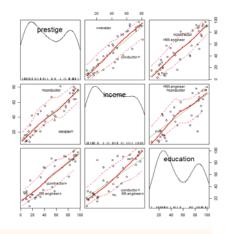


### Multivariate plots

These basic plots can be enhanced in many ways to be more informative.

The function scatterplotMatrix() in the car package provides

- univariate plots for each variable
- linear regression lines and loess smoothed curves for each pair
- automatic labeling of noteworthy observations (id.n=)



library(car)
scatterplotMatrix(~prestige + income + education, data=Duncan, id.n=2)

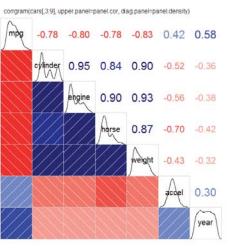
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### Multivariate plots: corrgrams

For larger data sets, visual summaries are often more useful than direct plots of the raw data

A corrgram ("correlation diagram") allows the data to be rendered in a variety of ways, specified by panel functions.

Here the main goal is to see how mpg is related to the other variables



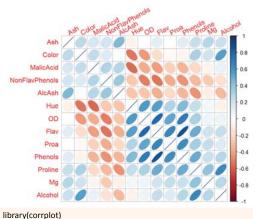
See: Friendly, M. Corrgrams: Exploratory displays for correlation matrices. The American Statistician, 2002, 56, 316-324

#### Multivariate plots: corrgrams

For even larger data sets, more abstract visual summaries are necessary to see the patterns of relationships.

This example uses schematic ellipses to show the strength and direction of correlations among variables on a large collection of Italian wines.

Here the main goal is to see how the variables are related to each other.

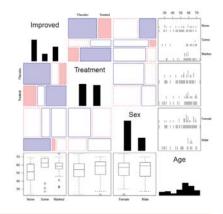


corrplot(cor(wine), tl.srt=30, method="ellipse", order="AOE")

## Generalized pairs plots

Generalized pairs plots from the gpairs package handle both categorical (**C**) and quantitative (**Q**) variables in sensible ways

| у | plot        |
|---|-------------|
| Q | scatterplot |
| Q | boxplot     |
| С | barcode     |
| С | mosaic      |
|   | Q<br>Q<br>C |



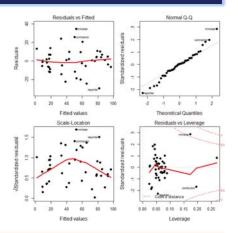
library(gpairs)
data(Arthritis)
gpairs(Arthritis[, c(5, 2:5)], ...)

### Models: diagnostic plots

Linear statistical models (ANOVA, regression),  $\mathbf{y} = \mathbf{X} \boldsymbol{\beta} + \boldsymbol{\epsilon}$ , require some assumptions:  $\boldsymbol{\epsilon} \sim N(\mathbf{0}, \boldsymbol{\sigma}^2)$ 

For a fitted model object, the plot() method gives some useful diagnostic plots:

- residuals vs. fitted: any pattern?
- Normal QQ: are residuals normal?
- scale-location: constant variance?
- residual-leverage: outliers?



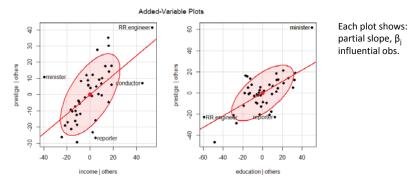
duncan.mod <- lm(prestige ~ income + education, data=Duncan)
plot(duncan.mod)</pre>

## Models: Added variable plots

The car package has many more functions for plotting linear model objects Among these, added variable plots show the partial relations of y to each x, holding all other predictors constant.

library(car)

avPlots(duncan.mod, id.n=2,ellipse=TRUE, ...)



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#### Models: Interpretation

#### Fitted models are often difficult to interpret from tables of coefficients

```
# add term for type of job
duncan.mod1 <- update(duncan.mod, . ~ . + type)
summary(duncan.mod1)
```

Call:

lm(formula = prestige ~ income + education + type, data = Duncan)

#### Coefficients:

|             | Estimate S  | td. Error | t value | Pr(> t ) |               |
|-------------|-------------|-----------|---------|----------|---------------|
| (Intercept) | -0.18503    | 3.71377   | -0.050  | 0.96051  |               |
| income      | 0.59755     | 0.08936   | 6.687   | 5.12e-08 | * * *         |
| education   | 0.34532     | 0.11361   | 3.040   | 0.00416  | * *           |
| typeprof    | 16.65751    | 6.99301   | 2.382   | 0.02206  | *             |
| typewc      | -14.66113   | 6.10877   | -2.400  | 0.02114  | *             |
|             |             |           |         |          |               |
| Signif code | eg: 0 `***' | 0 001 *** | × 0 01  | * 0 05   | · / O 1 · / 1 |

Residual standard error: 9.744 on 40 degrees of freedom Multiple R-squared: 0.9131, Adjusted R-squared: 0.9044 F-statistic: 105 on 4 and 40 DF, p-value: < 2.2e-16 effect of each predictor?

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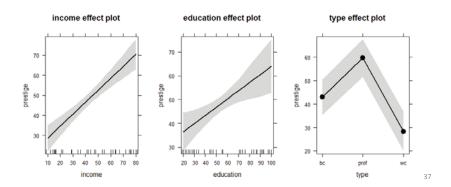
How to understand

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## Models: Effect plots

Fitted models are more easily interpreted by plotting the predicted values. Effect plots do this nicely, making plots for each high-order term, controlling for others

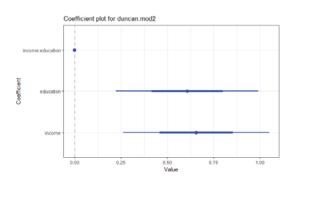
library(effects)
duncan.eff1 <- allEffects(duncan.modl)
plot(duncan.eff1)</pre>

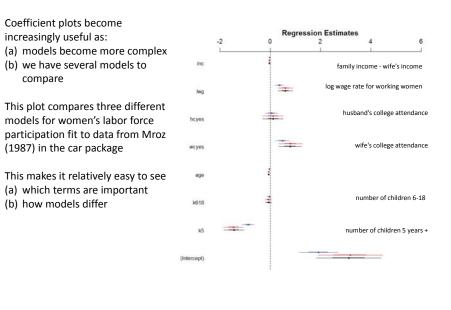


## Models: Coefficient plots

Sometimes you need to report or display the coefficients from a fitted model. A plot of coefficients with CIs is sometimes more effective than a table.

#### library(coefplot)





This example from: https://www.r-statistics.com/2010/07/visualization-of-regression-coefficients-in-r/

### 3D graphics

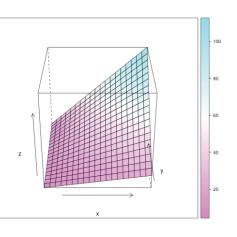
R has a wide variety of features and packages that support 3D graphics

This example illustrates the concept of an interaction between predictors in a linear regression model

#### It uses: lattice::wireframe(z ~ x + y, ...)

The basic plot is "printed" 36 times rotated 10° about the z axis to produce 36 PNG images.

The ImageMagick utility is used to convert these to an animated GIF graphic



z = 10 + .5x +.3y + .2 x\*y

### 3D graphics: code

#### 1. Generate data for the model $z = 10 + .5x + .3y + .2x^*y$

b0 <- 10 # intercept b1 <- .5 # x coefficient b2 <- .3 # y coefficient int12 <- .2 # x\*y coefficient g <- expand.grid(x = 1:20, y = 1:20) g\$z <- b0 + b1\*g\$x + b2\*g\$y + int12\*g\$x\*g\$y</pre>

#### 2. Make one 3D plot

library(lattice)
wireframe(z ~ x \* y, data = g)

#### 3. Create a set of PNG images, rotating around the z axis

png(file="example%03d.png", width=480, height=480)
for (i in seq(0, 350 ,10)){
 print(wireframe(z ~ x \* y, data = g,
 screen = list(z = i, x = -60), drape=TRUE))}
dev.off()

#### 4. Convert PNGs to GIF using ImageMagik

system("convert -delay 40 example\*.png animated\_3D\_plot.gif")

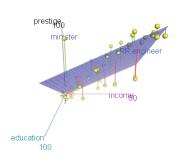
## 3D graphics

The rgl package is the most general for drawing 3D graphs in R. Other R packages use this for 3D statistical graphs

This example uses car::scatter3d() to show the data and fitted response surface

Duncan data

for the multiple regression model for the



scatter3d(prestige ~ income + education, data=Duncan, id.n=2, revolutions=2)

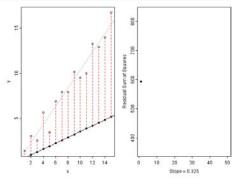
### Statistical animations

Statistical concepts can often be illustrated in a dynamic plot of some process.

This example illustrates the idea of least squares fitting of a regression line.

As the slope of the line is varied, the right panel shows the residual sum of squares.

This plot was done using the animate package



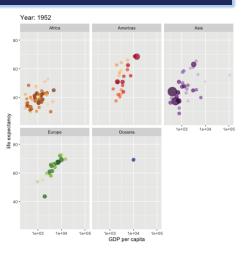
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#### Data animations

Time-series data are often plotted against time on an X axis.

Complex relations over time can often be made simpler by animating change – liberating the X axis to show something else

This example from the tweenr package (using gganimate)



## Maps and spatial visualizations

Spatial visualization in R, combines map data sets, statistical models for spatial data, and a growing number of R packages for map-based display

This example, from Paul Murrell's *R Graphics* book shows a basic map of Brazil, with provinces and their capitals, shaded by region of the country.

Data-based maps can show spatial variation of some variable of interest



Murrell, Fig. 14.5

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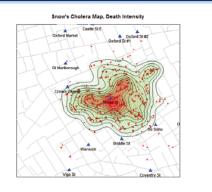
## Maps and spatial visualizations

Dr. John Snow's map of cholera in London, 1854

Enhanced in R in the HistData package to make Snow's point

Portion of Snow's map:





library(HistData) SnowMap(density=TRUE, main="Snow's Cholera Map, Death Intensity")

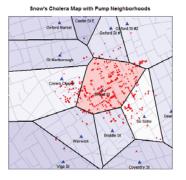
Contours of death densities are calculated using a 2d binned kernel density estimate, bkde2D() from the KernSmooth package

## Maps and spatial visualizations

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Enhanced in R in the HistData package to make Snow's point

These and other historical examples come from Friendly & Wainer, *The Origin of Graphical Species*, Harvard Univ. Press, in progress.



SnowMap(density=TRUE, main="Snow's Cholera Map with Pump Neighborhoods")

Neighborhoods are the Voronoi polygons of the map closest to each pump, calculated using the deldir package.

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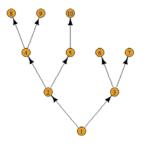
## Diagrams: Trees & Graphs

A number of R packages are specialized to draw particular types of diagrams. igraph is designed for network diagrams of nodes and edges

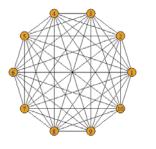


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library(igraph) tree <- graph.tree(10) tree <- set.edge.attribute(tree, "color", value="black") plot(treelgraph, layout=layout.reingold.tilford(tree, root=1, fib.y=FALSE))



full <- graph.full(10) fullgraph <- set.edge.attribute(full, "color", value="black") plot(full, layout=layout.circle)



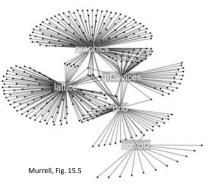
## Diagrams: Network diagrams

graphvis (<u>http://www.graphviz.org/</u>) is a comprehensive program for drawing network diagrams and abstract graphs. It uses a simple notation to describe nodes and edges.

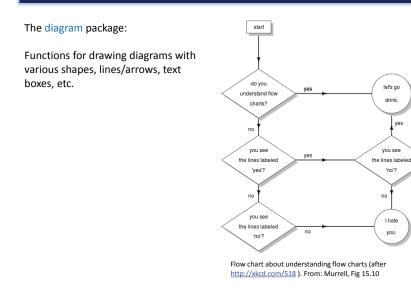
The Rgraphviz package (from Bioconductor) provides an R interface

This example, from Murrell's *R Graphics* book, shows a node for each package that directly depends on the main R graphics packages.

An interactive version could provide "tool tips", allowing exploring the relationships among packages



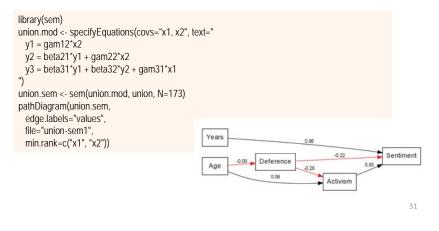
### **Diagrams: Flow charts**



## Path diagrams: structural equation models

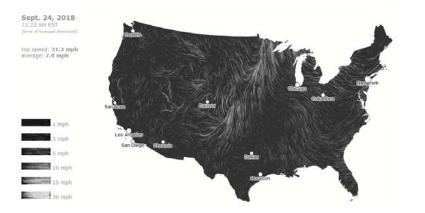
Similar diagrams are used to display structural equation models as "path diagrams" The sem and laavan packages have pathDiagram() functions to draw a proposed or fitted model.

They use the DiagrammeR package to do the drawing.



#### Dynamically updated data visualizations

The wind map app, <u>http://hint.fm/wind/</u> is one of a growing number of R-based applications that harvests data from standard sources, and presents a visualization



## Web scraping: CRAN package history

R has extensive facilities for extracting and processing information obtained from web pages. The XML package is one useful tool for this purpose.

This example:

- downloads information about all R packages from the CRAN web site,
- finds & counts all of those available for each R version,
- plots the counts with ggplot2, adding a smoothed curve, and plot annotations

On Jan. 27, 2017, the number of R packages on CRAN reached 10,000



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## shiny: Interactive R applications



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shiny, from R Studio, makes it easier to develop interactive applications

#### Shiny User Showcase

The Shiny User Showcase contains an inspiring set of sophisticated apps developed and contributed by Shiny users.



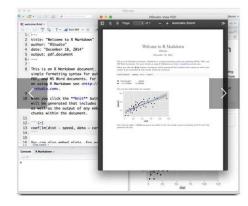
#### Interactive visualizations

Shiny is designed for fully interactive visualization, using JavaScript libraries like d3, Leaflet, and Google Charts.



#### Many examples at https://shiny.rstudio.com/gallery/

Reproducible analysis & reporting



R Studio, together with the knitr and rmarkdown packages provide an easy way to combine writing, analysis, and R output into complete documents

.Rmd files are just text files, using rmarkdown markup and knitr to run R on "code chunks"

A given document can be rendered in different output formats:



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## Output formats and templates



Templates are available for APA papers, slides, handouts, entire web sites, etc.

HTML The ggplot2 book was written

using .Rmd format. The bookdown package makes it easier to manage a booklength project – TOC, fig/table

#s, cross-references, etc.

My last book was written entirely in R Studio, using .Rnw

camera ready copy

syntax  $\rightarrow$  LaTeX  $\rightarrow$  PDF  $\rightarrow$ 

The integration of R, R Studio, knitr,

rmarkdown and other tools is now

highly advanced.

## Writing it up

- In R Studio, create a .Rmd file to use R Markdown for your write-up
  - Iots of options: HTML, Word, PDF (needs LaTeX)

|        | • |       | R Script       | Ctrl+Shift+N  |
|--------|---|-------|----------------|---|
|        |   |       | R Notebook     |   |
| Ctrl+O |   |       |                |   |
|        |   | D     |                |   |
|        |   | ***   | Shiny Web Ap   | P   |
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File

| Authors  | Michael Friendly   |
|--|--|
|  | (not real country)   |
| HTML     Recomm     werd o     PDF     PDF     PDF     2013+ on     Word     Precieven | utput Format:<br>molad Jamas for authoring Linu Can suitch to FD/<br>ongo in spyrings,<br>at requires To (MDCRA' on Windows, MacToX<br>52, 58, 50, bit (MDCRA' on Windows, MacToX<br>50, 50, 50, 50, 50, 50, 50, 50, 50, 50, |
|  | HTML     Recomm     or Word o     PDF     PDF     PDF     2053+ pm     Or Word     Precision   |

### Writing it up

- Use simple Markdown to write text
- Include code chunks for analysis & graphs

# mypaper.Rmd, created from a template

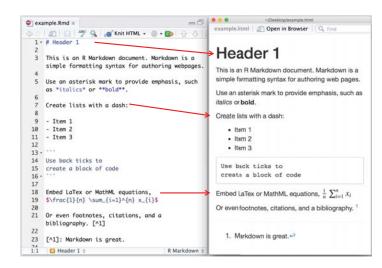
|                  | date: "January 29, 2018"  | yaml header  |
|------------------|---|--|
| 9<br>10          | knitr::opts_chunkSset(echo =  | TRUE)  |
| 11<br>12 -<br>13 | ## R Markdown   | Header 2   |
| 14               |   | t. Markdown is a simple formatting<br>ee <http: rmarkdown.rstudio.com="">.</http:> |
| 16<br>17         | R code chunks within the docu                                       | utton a document will be generated<br>ment. You can embed an R code chunk          |
| 18 *<br>19<br>20 | <pre>intersation (cars) intersation (cars) intersation (cars)</pre> | output code chunk  |
| 21<br>22 -<br>23 | ## Including Plots  |  |
| 24<br>25         | You can also embed plots, for                                       | example:   |
| 26 -<br>27<br>28 | <pre>(r pressure, echo+FALSE) plot(pressure)</pre>                  | plot code chunk  |
|                  |   |  |

Files Plots Packages Help Viewer + + A Markdown Quick Reference R Markdown is an easy-to-write plain text format for creating dynamic documents and reports. See Using R Markdown to learn more. Emphasi "italic" italic\_\_beld Neader # neader 1 se reader 2 ses seader 1 Lists · Ites 1 · Ites 2 + Item 24 + Item 20 1. 21em 1 2. 21em 2 3. 21em 3 • 21em 3 • 21em 3 • 21em 3 59

Help -> Markdown guick reference

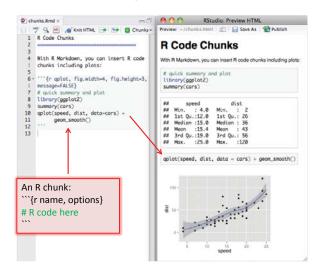
## rmarkdown basics

rmarkdown uses simple markdown formatting for all standard document elements



## R code chunks

R code chunks are run by knitr, and the results are inserted in the output document



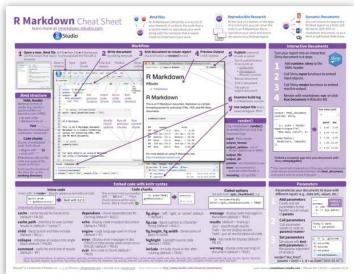
There are many options for controlling the details of chunk output – numbers, tables, graphs

Choose the output format:

Knit to HTML
 Knit to PDF
 Knit to Word
 Knit to Word
 Knit with Parameters...

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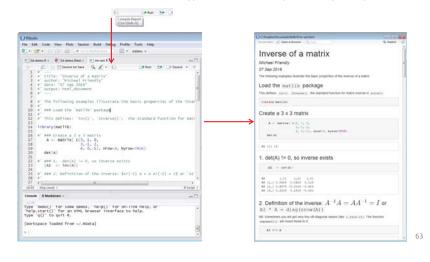
#### The R Markdown Cheat Sheet provides most of the details https://www.rstudio.com/wp-content/uploads/2016/03/rmarkdown-cheatsheet-2.0.pdf



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## R notebooks

Often, you just want to "compile" an R script, and get the output embedded in the result, in HTML, Word, or PDF. Just type Ctrl-Shift-K or tap the Compile Report button



### Summary & Homework

- Today has been mostly about an overview of R graphics, but with emphasis on:
  - R, R Studio, R package tools
  - Roles of graphics in data analysis,
  - A small gallery of examples of different kinds of graphic applications in R; only small samples of R code
  - Work flow: How to use R productively in analysis & reporting
- Next week: start on skills with traditional graphics
- Homework:
  - Install R & R Studio
  - Find one or more examples of data graphs from your research area
    - What are the graphic elements: points, lines, areas, regions, text, labels, ???
    - How could they be "described" to software such as R?
    - How could they be improved?