Tricks for cleaning your data in R

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GitHub repository for Data+Code: https://github.com/underthecurve/r-data-cleaning-tricks

Data cleaning is a cumbersome task, and it can be hard to navigate in programming languages like R. When I was first learning R, I relied on familiar tools like Excel to clean my datasets before importing them into R to run analyses. This approach was often not ideal because it became hard to retrace my footsteps when I wanted to check my work. I always believed it would be better to have everything in one place, so I was motivated to learn how to clean my data in R.

R is a powerful tool for data cleaning and analysis. By default, it leaves a trail of code that documents all the work you've done, which makes it extremely useful for creating reproducible workflows.

In this workshop, I'll show you some examples of real-life "messy" datasets, the problems they present for analysis in R, and the "tidy" solutions to these problems.

Underlying this workshop is Hadley Wickham's principle of Tidy Data, which you can read about here.

1. Finding and replacing non-numeric characters like, and \$

Since we're in Boston, let's check out the city's Open Data portal, where the local government puts up datasets that are free for the public to analyze.

The Employee Earnings Report is one of the more interesting ones, because it gives payroll data for every person on the municipal payroll. It's where the *Boston Globe* gets stories like these every year:

- "64 City of Boston workers earn more than \$250,000" (February 6, 2016)
- "Police detective tops Boston's payroll with a total of over \$403,000" (February 14, 2017)

Let's take at the February 14 story from this year. The story begins:

"A veteran police detective took home more than \$403,000 in earnings last year, topping the list of Boston's highest-paid employees in 2016, newly released city payroll data show."

What if we wanted to check this number using the Employee Earnings Report?

We can use the read.csv() to load the csv file into R. We will call this data frame salary.

salary <- read.csv('employee-earnings-report-2016.csv')</pre>

We can use the head() function to inspect the first six rows of salary:

head(salary)

##		NAME	DEPARTMENT_	NAME	
##	1	Abadi,Kidani A	Assessing Depart	ment	
##	2	Abasciano,Joseph H	Boston Police Depart	ment	
##	3	Abban,Christopher John	Boston Fire Depart	ment	
##	4	Abbasi,Sophia	Green Aca	demy	
##	5	Abbate-Vaughn,Jorgelina	BPS Ellis Elemen	tary	
##	6	Abberton, James P	Public Works Depart	ment	
##		TITLE	REGULAR RETRO	OTHER	OVERTIME
##	1	Property Officer	\$46,291.98	\$300.00	
##	2	Police Officer	\$6,933.66	\$850.00	\$205.92
##	3	Fire Fighter	\$103,442.22	\$550.00	\$15,884.53

```
## 4
         Manager (C) (non-ac)
                               $18,249.83
## 5
                      Teacher $84,410.28
                                                $1,250.00
## 6 Maint Mech (Carpenter)## $41,449.16
                                                   $81.00 $8,807.47
                   DETAIL QUINN.EDUCATION.INCENTIVE TOTAL.EARNINGS POSTAL
##
        INJURED
## 1
                                                        $46,591.98
                                                                    02118
## 2 $74,331.86
                                         $15,258.44
                                                         $97,579.88 02132
                $4,746.50
## 3
                                                       $124,623.25 02132
## 4
                                                         $18,249.83 02148
## 5
                                                         $85,660.28 02481
## 6
                                                        $50,337.63 02127
```

There are a lot of columns. Let's simplify by selecting the ones of interest: NAME, DEPARTMENT_NAME, and TOTAL.EARNINGS. We can do this using the select() function in dplyr. We will save them into a new data frame, salary.selected.

We load the dplyr package using library('dplyr'):

install.packages('dplyr') # if you don't already have the package library('dplyr') # load the dplyr package

We can also change these names to lowercase names for easier typing using tolower():

names(salary.selected) <- tolower(names(salary.selected)) # change variable names to lowercase</pre>

Let's use head() to visually inspect the first six rows of salary.selected:

```
head(salary.selected)
```

##		name	department_name	total.earnings
##	1	Abadi,Kidani A	Assessing Department	\$46,591.98
##	2	Abasciano,Joseph	Boston Police Department	\$97,579.88
##	3	Abban,Christopher John	Boston Fire Department	\$124,623.25
##	4	Abbasi,Sophia	Green Academy	\$18,249.83
##	5	Abbate-Vaughn, Jorgelina	BPS Ellis Elementary	\$85,660.28
##	6	Abberton,James P	Public Works Department	\$50,337.63

Now let's try sorting the data by total.earnings using the arrange() function in dplyr:

salary.sort <- arrange(salary.selected, # dataset to sort total.earnings) # variable to sort by

We can use head() to visually inspect salary.sort:

head(salary.sort)

```
##
                    name
                                       department_name total.earnings
## 1 Fowlkes,Lorraine E.
                                   Boston City Council
                                                             $1,000.00
## 2
        Lally, Bernadette
                                   Boston City Council
                                                             $1,000.00
## 3
            Nolan, Andrew
                                      Parks Department
                                                             $1,000.00
## 4
      White-Pilet, Yoni A BPS Substitute Teachers/Nurs
                                                             $1,006.53
## 5
             Dunn,Lori D
                                  BPS East Boston High
                                                             $1,010.05
## 6
         Hopkins, Susan R
                                 BPS Mather Elementary
                                                             $1,017.94
```

What went wrong?

The problem is that there are non-numeric characters, , and \$, in the total.earnings column. We can see with class() that total.earnings is recognized as factor rather than numeric.

class(salary.selected\$total.earnings)

[1] "factor"

We need to find the , and \$ in total.earnings and remove them—in computer science lingo, "pattern matching and replacement." The str_replace function in the stringr package lets us do this easily.

Let's start by removing the comma and write the result to the original column. (The format for calling a column from a data frame in R is data frame.name\$column.name)

We load the stringr package using library('stringr'):

```
# install.packages('stringr') # if you don't already have the package
library('stringr') # load the stringr package
salary.selected$total.earnings <- str_replace(
    salary.selected$total.earnings, # column we want to search
    pattern = ',', # what to find
    replacement = '' # what to replace it with
)
```

Using head() to visually inspect salary.selected, we see that the commas are gone:

```
head(salary.selected) # this works - the commas are gone
```

##		name	department_name	total.earnings
##	1	Abadi,Kidani A	Assessing Department	\$46591.98
##	2	Abasciano,Joseph	Boston Police Department	\$97579.88
##	3	Abban,Christopher John	Boston Fire Department	\$124623.25
##	4	Abbasi,Sophia	Green Academy	\$18249.83
##	5	Abbate-Vaughn, Jorgelina	BPS Ellis Elementary	\$85660.28
##	6	Abberton,James P	Public Works Department	\$50337.63

The dollar sign \$ is trickier. Let's try doing the exact same thing, except let's set pattern = '\$' instead of pattern = ',':

```
salary.selected$total.earnings <- str_replace(
    salary.selected$total.earnings, # column we want to search
    pattern = '$', # what to find
    replacement = '' # what to replace it with
)</pre>
```

Using head() to visually inspect salary.selected, we see that the dollar signs are still there: head(salary.selected) # this didn't work - the dollar signs are still there

## 1 Abadi,Kidani A Assessing Department \$46591.9	s
	8
## 2 Abasciano, Joseph Boston Police Department \$97579.8	8
## 3 Abban, Christopher John Boston Fire Department \$124623.2	5
## 4 Abbasi,Sophia Green Academy \$18249.8	3
<pre>## 5 Abbate-Vaughn, Jorgelina BPS Ellis Elementary \$85660.2</pre>	8
## 6 Abberton, James P Public Works Department \$50337.6	3

 $s = 1 - \{ \} | () \}$. Dealing with s = 2 () \). Dealing with these is a bit complicated (more info on them here), but basically if we want R to literally find a dollar sign, s = 1 - 1, which lets R know to ignore or "escape" the special attributes of s = 1 on its own.

```
salary.selected$total.earnings <- str_replace(
    salary.selected$total.earnings, # column we want to search
    pattern = '\\$', # what to find
    replacement = '' # what to replace it with
)</pre>
```

Using head() to visually inspect salary.selected, we see that the dollar signs are gone: head(salary.selected)

```
##
                                      department_name total.earnings
                        name
## 1
              Abadi,Kidani A
                                 Assessing Department
                                                            46591.98
## 2
            Abasciano, Joseph Boston Police Department
                                                            97579.88
## 3 Abban, Christopher John Boston Fire Department
                                                           124623.25
## 4
               Abbasi,Sophia
                                        Green Academy
                                                           18249.83
## 5 Abbate-Vaughn, Jorgelina
                                                            85660.28
                                 BPS Ellis Elementary
            Abberton, James P Public Works Department
                                                            50337.63
## 6
```

Now can we use arrange() to sort the data by total.earnings?

Let's take a look at salary.sort, using head():

head(salary.sort)

##		name	department_name	total.earnings
##	1	Charles, Yveline	BPS Transportation	10.07
##	2	Jean Baptiste,Hugues	BPS Transportation	10.12
##	3	Piper,Sarah A	BPS Transportation	10.47
##	4	Laguerre,Yolaine M	BPS Transportation	10.94
##	5	Mayo,Wanda M	Food & Nutrition Svc	100.00
##	6	Rosario Severino, Yomayra	Food & Nutrition Svc	100.00

What's the problem?

Again, we can use the class() function to check on how the total.earnings variable is encoded.

class(salary.selected\$total.earnings) # a character, not numeric

[1] "character"

It's a "character" now (still not numeric), because we didn't tell R that it should be numeric. We can do this with as.numeric():

```
salary.selected$total.earnings <- as.numeric(salary.selected$total.earnings)</pre>
```

Now let's run class() again:

```
class(salary.selected$total.earnings)
```

[1] "numeric"

Now let's sort using arrange():

head(salary.sort) # ascending order by default

##		name	department_name	total.earnings
##	1	Jameau,Bernadette	BPS Transportation	2.14
##	2	Bridgewaters,Sandra J	BPS Transportation	2.50
##	3	Milian,Sonia Maria	BPS Transportation	3.85
##	4	Burke II, Myrell Nadine	BPS Transportation	4.38
##	5	Gillard Jr.,Trina F	Food & Nutrition Svc	5.00
##	6	Lucas,Mona-Lisa L.	Food & Nutrition Svc	5.36

One last thing: we have to specify desc(total.earnings) within arrange() because the function by default sorts the data in ascending order.

head(salary.sort) # Waiman Lee from the Boston PD is the highest paid city employee

##		name		depar	rtment_name	total.earnings
##	1	Lee,Waiman	${\tt Boston}$	Police	Department	403408.6
##	2	Josey,Windell C.	${\tt Boston}$	Police	Department	396348.5
##	3	Painten,Paul A	${\tt Boston}$	Police	Department	373959.3
##	4	Brown,Gregory	Boston	Police	Department	351825.5
##	5	Hosein,Haseeb	Boston	Police	Department	346105.2
##	6	Kervin, Timothy M.	${\tt Boston}$	Police	Department	343818.2

We see that Waiman Lee from the Boston PD is the top earner with >403,408 per year, just as the *Boston Globe* article states.

The Boston Police Department has a lot of high earners. We can figure out the average earnings by department, which we'll call average.earnings, by using the group_by() and summarise() functions in dplyr.

Now would be a good time to introduce %>%, known as the pipe operator.

 \gg is an extremely valuable tool in R, because it allows functions to be chained rather than nested. \gg looks strange but can be read as "then"—it tells R to do whatever comes after it to the stuff comes before it.

```
salary.average <- salary.selected %>% # take the salary.selected data frame, THEN
group_by(department_name) %>% # group by department_name, THEN
summarise(average.earnings = mean(total.earnings)) # calculate the mean of total.earnings for each de
```

If we were to do this without piping, it would look like

summarise(group_by(salary.selected, department_name), average.earnings = mean(total.earnings))

Let's look at salary.average using head():

head(salary.average) # first six rows of average salary by department (alphabetical order)

A tibble: 6 x 2

##		department_name	average.earnings
##		<fctr></fctr>	<dbl></dbl>
##	1	Accountability	102073.28
##	2	Achievement Gap	60105.52
##	3	Alighieri Montessori School	55160.03
##	4	ASD Human Resources	67236.15
##	5	ASD Intergvernmtl Relations	83787.58
##	6	ASD Office of Budget Mangmnt	73946.04

We can find the Boston Police Department using filter():

salary.average %>% filter(department_name == 'Boston Police Department')

A tibble: 1 x 2
department_name average.earnings
<fctr> <dbl>
1 Boston Police Department 124787.2

Exercise: The salary.average data frame is currently ordered alphabetically by department. How would you sort this dataset by average earnings, from highest to lowest?

2. Merging datasets

Now we have two main datasets, salary.sort (the salary for each person, sorted from high to low) and salary.average (the average salary for each department). What if I wanted to merge these two together, so I could see side-by-side each person's salary compared to the average for their department?

We want to join by the department_name variable, since that is consistent across both datasets. Let's put the merged data into a new dataframe, salary.merged:

salary.merged <- merge(x = salary.sort, y = salary.average, by = 'department_name')</pre>

Now we can see the department average, salary.average, next to the individual's salary, total.earnings: head(salary.merged)

name total.earnings department_name ## 1 Accountability Guttenberg,Nicole Desiree 120132.7 ## 2 Accountability Hedley-Mitchell, Angela E 120373.0 ## 3 Accountability Martin, Dean M. 117132.9 Solomon, Stacey L. ## 4 Accountability 109129.7 **##** 5 Accountability Lipkin,Linda S 115418.4 **##** 6 Accountability Anderson, Daniel 108408.9 ## average.earnings ## 1 102073.3 ## 2 102073.3 ## 3 102073.3 ## 4 102073.3 ## 5 102073.3 ## 6 102073.3

3. Reshaping data

Here's a dataset on unemployment rates by country from 2012 to 2016, from the International Monetary Fund's World Economic Outlook database (available here).

When you download the dataset, it comes in an Excel file. We can use the read_excel() from the readxl package to load the file into R.

We load the readxl package using library('readxl'):

```
# install.packages('readxl') # if you don't already have the package
library('readxl') # load the readxl package
```

unemployment <- read_excel('unemployment.xlsx')</pre>

Right now, the data are in what's commonly referred to as "wide" format, meaning the variables (unemployment rate for each year) are spread across rows. This might be good for presentation, but it's not great for certain calculations or graphing. "Wide" format data also becomes confusing if other variables are added.

We need to change the format from "wide" to "long," meaning that the columns (2012, 2013, 2014, 2015, 2016) will be converted into a new variable, which we'll call Year, with repeated values for each country. And the unemployment rates will be put into a new variable, which we'll call Rate.Unemployed.

We'd like the data to look like this:

## #	A	tibble:	10 x	3
##		Country	Year	Rate.Unemployed
##		<chr></chr>	<chr></chr>	<chr></chr>
##	1	Albania	2012	13.4
##	2	Albania	2013	16
##	3	Albania	2014	17.5
##	4	Albania	2015	17.1
##	5	Albania	2016	16.1
##	6	Algeria	2012	11
##	7	Algeria	2013	9.82900000000001
##	8	Algeria	2014	10.6
##	9	Algeria	2015	11.214
## 1	0	Algeria	2016	10.498

To do this, we'll use the gather() function in tidyr to create a new data frame, unemployment.long.

We load the tidyr package using library('tidyr'):

```
# install.packages('tidyr')
library('tidyr') # load the tidyr package
unemployment.long <- gather(unemployment, # data to reshape
            Year, # column we want to create from the rows
            Rate.Unemployed, # the values of interest
            -Country # already a column in the data
            )</pre>
```

Inspecting unemployment.long using head() shows that we have successfully created a long dataset. head(unemployment.long)

##	#	A tibble:	6 x 3	
##		Country	Year	Rate.Unemployed
##		<chr></chr>	<chr></chr>	<chr></chr>
##	1	Albania	2012	13.4
##	2	Algeria	2012	11
##	3	Argentina	2012	7.2
##	4	Armenia	2012	17.3
##	5	Australia	2012	5.217
##	6	Austria	2012	4.933

But there's a problem. Rate.Unemployed is not recognized as a numeric variable.

class(unemployment.long\$Rate.Unemployed) ## "character", not "numeric"

[1] "character"

Why do you think this is? (hint, use head() to find out)

We can use as.numeric() to convert Rate.Unemployed to a numeric variable.

unemployment.long\$Rate.Unemployed <- as.numeric(unemployment.long\$Rate.Unemployed)

Warning: NAs introduced by coercion

str() is another way to check how variables are encoded. It returns the structure of the entire dataset:

```
str(unemployment.long) # Rate.Unemployed is now "num", which stands for "numeric"
```

Classes 'tbl_df', 'tbl' and 'data.frame': 560 obs. of 3 variables: ## \$ Country : chr "Albania" "Algeria" "Argentina" "Armenia" ... "2012" "2012" "2012" "2012" ... ## \$ Year : chr \$ Rate.Unemployed: num 13.4 11 7.2 17.3 5.22 ...

4. Calculating year-over-year change in panel data

Sort the data by Country using the arrange() function in dplyr:

```
unemployment.long <- arrange(unemployment.long, # data frame to sort
                             Country, Year) # variables to sort by
```

The above code is equivalent to the following, which uses the pipe operator, %>%:

unemployment.long <- unemployment.long %>% # Take the unemployment.long data frame, THEN arrange(Country, Year) # sort it by Country and then Year.

Now let's use head() to inspect the unemployment.long, but instead of the first six rows (the default), let's look at the first five:

head(unemployment.long, 5) # First five rows of the data

##	#	A tibble	e: 5 x	3
##		Country	Year	Rate.Unemployed
##		<chr></chr>	< chr >	<dbl></dbl>
##	1	Albania	2012	13.4
##	2	Albania	2013	16.0
##	3	Albania	2014	17.5
##	4	Albania	2015	17.1
##	5	Albania	2016	16.1

This type of data is known in time-series analysis as a panel; each country is observed every year from 2012 to 2016.

For Albania, the percentage point change in unemployment rate from 2012 to 2013 would be 16 - 13.4 = 2.5percentage points. What if I wanted the year-over-year change in unemployment rate for every country?

This is an example where having a tidy dataset really helps. We can use the mutate() function in dplyr to create a new variable, Change, which is the difference between Rate. Unemployed and lag(Rate.Unemployed) (the default for lag() is 1 position, which is good for us since we want the change from the previous year).

unemployment.long <- unemployment.long %>% # take the unemployment.long dataset, THEN mutate(Change = Rate.Unemployed - lag(Rate.Unemployed)) # create a variable called Change

Let's inspect the first five rows again, using head():

```
head(unemployment.long, 5)
```

```
## # A tibble: 5 x 4
##
    Country Year Rate.Unemployed Change
##
       <chr> <chr>
                             <dbl> <dbl>
```

##	1	Albania	2012	13.4	NA
##	2	Albania	2013	16.0	2.6
##	3	Albania	2014	17.5	1.5
##	4	Albania	2015	17.1	-0.4
##	5	Albania	2016	16.1	-1.0

So far so good. It also makes sense that Albania's Change is NA in 2012, since the dataset doesn't contain any unemployment figures before the year 2012.

But a closer inspection of the data reveals a problem. What if we used tail() to look at the *last* 5 rows of the data?

tail(unemployment.long, 5)

##	#	A tibble	e: 5 x	4	
##		Country	Year	Rate.Unemployed	Change
##		<chr></chr>	< chr >	<dbl></dbl>	<dbl></dbl>
##	1	Vietnam	2012	2.74	-18.493
##	2	Vietnam	2013	2.75	0.010
##	3	Vietnam	2014	2.05	-0.700
##	4	Vietnam	2015	2.40	0.350
##	5	Vietnam	2016	2.40	0.000

Why does Vietnam have a -18.493 percentage point change in 2012?

```
unemployment.long <- unemployment.long %>%
group_by(Country) %>%
mutate(Change = Rate.Unemployed - lag(Rate.Unemployed))
```

tail(unemployment.long, 5)

```
## Source: local data frame [5 x 4]
## Groups: Country [1]
##
## # A tibble: 5 x 4
##
     Country Year Rate.Unemployed Change
##
       <chr> <chr>
                             <dbl>
                                    <dbl>
## 1 Vietnam 2012
                              2.74
                                       NA
                              2.75
                                     0.01
## 2 Vietnam 2013
## 3 Vietnam 2014
                              2.05
                                    -0.70
## 4 Vietnam
                              2.40
                                     0.35
              2015
## 5 Vietnam 2016
                              2.40
                                     0.00
```

5. Recoding numerical variables into categorical ones

Here's a list of some attendees for today's workshop, with names and contact info removed.

```
attendees <- read.csv('attendees.csv', stringsAsFactors = F)
head(attendees)</pre>
```

##		Occupation	Job.title	Age.group	Gender
##	1	Data Analyst	Data Quality Analyst	30-39	Male
##	2	PhD Student	Student/Research Assistant	18-29	Male
##	3	Education	Data Analyst	18-29	Female
##	4	Manager	BAS Manager	30-39	Male
##	5	Government Finance	Performance Analyst	30 - 39	Male
##	6	Engineer	Display Engineer	30-39	Female

State.Province Education ## 1 MA Bachelor's Degree ## 2 MA Bachelor's Degree ## 3 Master's Degree Kentucky ## 4 MA Bachelor's Degree ## 5 MA Master's Degree ## 6 MA Bachelor's Degree ## Which.data.subject.area.are.you.most.interested.in.working.with...Select.up.to.three. ## 1 Retail ## 2 Sports ## 3 Retail ## 4 Education ## 5 Environment, Finance, Food and agriculture ## 6 Environment, Finance, Food and Agriculture ## ## 1 ## 2 ## 3 ## 4 ## 5 ## 6 Explore the field of data storytelling, including career options, Improve my ability to write with Which.type.of.laptop.will.you.bring. College.or.University.Name ## ## 1 PC ## 2 PC Boston University ## 3 PC ## 4 PC Boston University ## 5 MAC Advanced Data Storytelling ## 6 ## Major.or.Concentration College.Year ## 1 ## 2 Biostatistics PhD ## 3 ## 4 PEMBA Graduate ## 5 ## 6 ## Which.Digital.Badge.track.best.suits.you. ## 1 Advanced Data Storytelling ## 2 Advanced Data Storytelling ## 3 Advanced Data Storytelling ## 4 Advanced Data Storytelling Advanced Data Storytelling ## 5 ## 6 Advanced Data Storytelling ## Which.session.would.you.like.to.attend. ## 1 June 5-9 ## 2 June 5-9 ## 3 June 5-9 ## 4 June 5-9 ## 5 June 5-9 ## 6 June 5-9 ## Choose.your.status. ## 1 Nonprofit, Academic, Government ## 2 Student ## 3 Nonprofit, Academic, Government ## 4 Student

5 Nonprofit, Academic, Government Early Bird ## 6 Professional

What if we wanted to quickly see the age distribution of attendees?

table(attendees\$Age.group)

18-29 30 - 39 30 - 39## 4 1 7

There's an inconsistency in the labeling of the Age.group variable here. We can fix this using ifelse() by replacing the "30 - 39" with "30-39":

```
attendees$Age.group <- ifelse(attendees$Age.group == '30 - 39', # if attendees$Age.group == '30 - 39'
                              '30-39', # replace attendees$Age.group with '30-39'
                              attendees$Age.group) # otherwise, keep attendees$Age.group values the sam
```

This might seem trivial for just one value, but it's useful for larger datasets.

```
table(attendees$Age.group)
```

18-29 30-39 ## 4 8

Now let's take a look at the professional status of attendees, labeled in Choose.your.status.:

```
table(attendees$Choose.your.status.)
```

##				
##		Nonprofit	, Academic,	Government
##				3
##	Nonprofit,	Academic,	Government	Early Bird
##				1
##			P	rofessional
##				3
##				Student
##				5

"Nonprofit, Academic, Government" and "Nonprofit, Academic, Government Early Bird" seem to be the same. We can use ifelse() (and the R designation | for "or") to combine these two categories into one big category, "Nonprofit/Gov". Let's create a new variable, status, for our simplified categorization.

```
attendees$status <- ifelse(attendees$Choose.your.status. == 'Nonprofit, Academic, Government' |
                             attendees$Choose.your.status. == 'Nonprofit, Academic, Government Early Bi
                           'Nonprofit/Gov',
                           attendees$Choose.your.status.)
table(attendees$status)
```

Nonprofit/Gov Professional Student ## 4 3

What else?

- How would you use ifelse() and | to create a new variable in the attendees data (let's call it status2) that has just two categories, "Student" and "Other"?
- How would you rename the variables in the attendees data to make them easier to work with?

5

- What are some other issues with this dataset? How would you solve them using what we've learned?
- What are some other "messy" data issues you've encountered?