Session 7: Introduction to R Markdown

R for Stata Users

DIME Analytics The World Bank – DIME | WB Github March 2024



Preamble

• Make sure you have the packages tinytex, stargazer, and huxtable installed

```
# Package we used for other sessions, install only if needed
install.packages("huxtable")
```

```
# New packages
install.packages("tinytex")
install.packages("stargazer")
```

No need to load the packages for now

Preamble (() 5 min)

- Use tinytex to install LaTeX with: tinytex::install_tinytex()
- This will take a while. Leave it running:



- LaTeX can be unpredictable in WB computers. It's possible that this didn't work
- Don't worry for now, just follow the approppriate instructions we'll specify in the exercises

Introduction

- This is an **introduction** to R Markdown
- We'll show:
 - 1. How to write and knit (output) R Markdown documents
 - 2. How to format text and R code in R Markdown documents
 - 3. How to include regression tables in R Markdown documents

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- 1. Dynamic documents
- 2. Knitting
- 3. Markdown
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Dynamic documents and R Markdown

- Dynamic documents are documents that include both text and code outputs
- They are generated by a script and are updated automatically every time the script runs
- R Markdown is a type of dynamic document

• Code outputs and text are fully integrated



• You can format the text and code outputs as much as you need





- Each document element and formatting is defined by R and Markdown code
- You can define the document type you need



Why use dynamic documents?

- Increased research transparency. Documents are fully reproducible
- No more copying and pasting outputs from R to a document editor
- Nice option for simple documents that don't require a lot of formatting, but you can also customize your documents as needed
- Can include code snippets

- R markdown combines text, R code, and rendered outputs
- The text follows Markdown's syntax
- The code and outputs follow R's syntax
- Knitting an R Markdown document is rendering the text and code portions into a single output
- The output can be a PDF, Word, HTML document, or others

Exercise 1: Knit an R Markdown document (() 2 min, leave it running)

- 1. Download the file **r-markdown-template.Rmd** from : https://osf.io/7g6t9/
- 2. Open this file in RStudio
 - If the installation of tinytex didn't work, change line 2 to: output: html_document

3. Click on **Knit**. If RStudio asks you to update some packages, select **Yes**

Note that this might take a while



We'll continue with markdown syntax while it finishes

Markdown

Markdown



Code part

Text part

Markdown

- The text part of R Markdown follows the syntax of Markdown
- Markdown is a "light" markup language. It's similar to Latex or HTML, but simpler
- Markdown was designed to be easily readable while allowing to format text and document sections

Markdown - Headers

- Headers in markdown are preceded by pound (#) symbols
- Additional pound symbols denote a lower level in the headers hierarchy

```
# This is a header
## Subheader 1
### Subheader 2
#### Subheader 3
```



This is a header

Subheader 1

Subheader 2

Subheader 3

Markdown - Paragraphs

• Text not preceded by special symbols are regular paragraphs.

```
## Paragraphs
This is a line of text.
This is another line in the same paragraph.
New paragraphs are separated by two line breaks.
```

Paragraphs

This is a line of text. This is another line in the same paragraph. New paragraphs are separated by two line breaks.

Markdown - Text emphasis

• Emphasized text is enclosed by special symbols.

Text emphasis

Text in italics goes between *asterisks* or _underscores_.

Text in bold goes between **two asterisks** or __two underscores__.

You can combine asterisks and underscores to **emphasize with italics and bold _at the same time_**.

Strikethrough text ~~uses two tildes~~.

Text emphasis

Text in italics goes between *asterisks* or *underscores*.

Text in **bold** goes between **two** asterisks or two underscores.

You can combine asterisks and underscores to emphasize with italics and bold at the same time.

Strikethrough text uses two tildes.

Markdown - Lists

• Markdown allows us to use both ordered and unordered lists.

Lists

Ordered lists:

- 1. Include a number and a dot before every item
- Also remember to include a blank line before the beginning of the list
 The actual number does not matter, the item will have the correct order number



\mathbf{Lists}

Ordered lists:

- 1. Include a number and a dot before every item
- 2. Also remember to include a blank line before the beginning of the list
- 3. The actual number does not matter, the item will have the correct order number

Markdown - Lists

• Markdown allows us to use both ordered and unordered lists.

Unordered lists: * You can use an asterisk + Or a plus symbol - Or a minus symbol

Unordered lists:

- You can use an asterisk
- Or a plus symbol
- Or a minus symbol

Markdown - Links

• We can also include links as text in Markdown.

Links

Include the link text in brackets followed by the URL in parentheses. Like this:

This is [the WB website](https://https://www.worldbank.org)



Links

Include the link text in brackets followed by the URL in parentheses. Like this:

This is the WB website

https://https://www.worldbank.org

Markdown - Tables

• Lastly, we can include tables in Markdown text.

Tables

Use vertical lines to separate columns and at least three dashes to separate column headers.

This	is	column	1 This	is	column	2
Row	1		Row	1		
Row	2		Row	2		

Tables

Use vertical lines to separate columns and at least three dashes to separate column headers.

This is column 1	This is column 2
Row 1	Row 1
Row 2	Row 2

Markdown - Tables

• Lastly, we can include tables in Markdown text.

The width of the cells can vary in the markdown text and the output will look the same.

```
|This is column 1 |This is column 2|
|---|------|
|Row 1 |Row 1 |
|Row 2 |Row 2|
```

The width of the cells can vary in the markdown text and the output will look the same.

This is column 1	This is column 2
Row 1	Row 1
Row 2	Row 2

Exercise 1 results

 If exercise 1 worked, you'll now see this PDF file (or HTML) in the folder where you saved r-markdown-template.Rmd

<u>^</u>		
Name	Date modified	Туре
📕 Code	1/28/2022 2:51 PM	File folder
📜 DataSets	8/24/2020 3:42 PM	File folder
📕 Output	4/5/2021 4:37 PM	File folder
R descriptive-statistics.R	1/13/2022 1:29 PM	R File
🐣 r-markdown-template.pdf	2/1/2022 10:51 PM	Adobe Acrobat Docu
R r-markdown-template.Rmd	2/1/2022 10:36 PM	RMD File

- If it's still running, let it run until it finishes
- If it failed, try again after changing **output**: **html_document** in line 2

R Code

• R code in R Markdown goes inside **fenced code blocks**, as the one below

```{r} # Your R code goes here

• • •

To add new block, you can type the fences directly, or go to Insert > R in the script panel of RStudio, or type CTRL + ALT + i

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### Exercise 2: Include the summary of a variable (() 2 min)

- 1. Create a header named R Code at the bottom of r-markdowntemplate.Rmd
- 2. Create a new fenced code block where you load the dataset mtcars
  mtcars is a built-in dataset. Load it with: data(mtcars)
- 3. Inside the same block, get the summary of the variable mpg with summary(mtcars\$mpg)
- 4. Knit. You'll have to close the PDF document if you have it opened

## R Code

```{r}
data(mtcars)
summary(mtcars\$mpg)
```

### # R code

```
data(mtcars)
summary(mtcars$mpg)
```

### $\mathbf{R}$ code

data(mtcars)
summary(mtcars\$mpg)

## Min. 1st Qu. Median Mean 3rd Qu. Max. ## 10.40 15.43 19.20 20.09 22.80 33.90

## R Code

- What about running only the code block and not knitting the document?
- You can do that with the licon at the upper right corner of the block
- The other icon (**MI**) will run all previous code blocks until this block

```
\``{r}
data(mtcars)
summary(mtcars$mpg)
```



- Note that the output echoes both the code and the output
- What if we wanted to include the output but not the code?
- We use the argument **echo = FALSE** in the fenced code block for that
- Code block arguments are separated by commas inside the curly brackets, as
   in: {r, echo = FALSE}

### Exercise 3: Omit the code when knitting R code (() 1 min)

- 1. Add the option **echo = FALSE** to the fenced code block created in exercise 2
- 2. Knit the document and see how it's different now
```
```{r, echo = FALSE}
data(mtcars)
summary(mtcars$mpg)
```

R code



• To include only R code but not the output, we use the option **eval = FALSE**

```
```{r, eval = FALSE}
data(mtcars)
summary(mtcars$mpg)
```
```

R code

```
{r, eval = FALSE}
data(mtcars)
summary(mtcars$mpg)
```

\mathbf{R} code

data(mtcars)
summary(mtcars\$mpg)

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R Plots

Including R plots

- Adding R plots is similar to adding R code
- Include the code producing the plot in a fenced block
- The block option **echo = FALSE** is useful when we only want to include the plot but not the code producing it

Exercise 4: Include an R plot in your document (() 2 min)

- 1. Create a header named **R Plots**
- 2. Create a new fenced code block with the option **echo = FALSE**
- 3. Add the following code inside the new block:

```
plot(mtcars$wt,
    mtcars$mpg,
    main = "Plot example",
    xlab = "Car weight",
    ylab = "Miles per gallon")
```

Including R plots

R plots

```
```{r, echo = FALSE}
plot(mtcars$wt,
 mtcars$mpg,
 main = "Plot example",
 xlab = "Car weight",
 ylab = "Miles per gallon")
```

### Including R plots

# R Plots

![](_page_44_Figure_2.jpeg)

![](_page_44_Figure_3.jpeg)

![](_page_44_Figure_4.jpeg)

# Inline code

- Inline code is enclosed by backtick followed by an r (`r) and a single backtick
- For example:

The mean of mpg is `r mean(mtcars\$mpg)`.

• Will be rendered as:

The mean of mpg is 20.090625.

• Note that inline code doesn't go enclosed in code blocks, it's just regular Markdown text

#### Exercise 5 (() 2 min)

- 1. Create a new header named Inline code in markdown-template.Rmd
- 2. Add an unordered list with the following text and include inline R code to render the corresponding numbers in each case
  - The number of elements in mtcars is: (use function **nrow(mtcars)**)
  - The mean of weight is: (use function mean(mtcars\$wt)
  - The standard deviation is: (use function sd(mtcars\$wt)

- # Inline code
- The number of elements in mtcars is `r nrow(mtcars)`
- The mean of weight is `r mean(mtcars\$wt)`
- The standard deviation is `r sd(mtcars\$wt)`

#### # Inline code

- The number of elements in mtcars is: `r nrow(mtcars)`
- The mean of weight is: `r mean(mtcars\$wt)`
- The standard deviation is: `r sd(mtcars\$wt)`

![](_page_49_Picture_5.jpeg)

#### Inline code

- The number of elements in mtcars is: 32
- The mean of weight is: 3.21725
- The standard deviation is: 0.9784574

You can use the function **round()** to control the number of decimals displayed.

# Inline code

- The number of elements in mtcars is `r nrow(mtcars)`
- The mean of weight is `r round(mean(mtcars\$wt), 1)`
- The standard deviation is `r round(sd(mtcars\$wt), 2)`

You can use the function **round()** to control the number of decimals displayed.

#### # Inline code

- The number of elements in mtcars is: `r nrow(mtcars)`
- The mean of weight is: `r round(mean(mtcars\$wt), 1)`
- The standard deviation is: `r round(sd(mtcars\$wt), 2)`

#### Inline code

- The number of elements in mtcars is: 32
- The mean of weight is: 3.2
- The standard deviation is: 0.98

You can also combine R inline code with the markdown syntax for tables to produce statistics tables.

```
Inline code in tables
```

Column:	weight	Value	
	-		
N	ľ	`r nrow(mtcars)`	
Mean	ľ	<pre>`r round(mean(mtcars\$wt), 1)`</pre>	
SD	ľ	`r round(sd(mtcars\$wt), 2)`	

You can also combine R inline code with the markdown syntax for tables to produce statistics tables.

<pre># Inline code in</pre>	tables
Column: weight	Value
  N  Mean  SD	r nrow(mtcars) r round(mean(mtcars\$wt), 1) r round(sd(mtcars\$wt), 2)

Inline code in tables

Column: weight	Value
N	32
Mean	3.2
SD	0.98

Including regression outputs

## Including regression outputs

- In a previous session, we saw that we can produce regression tables in LaTeX
- We can use code producing LaTeX outputs along with the code block option
   results = "asis" to display them in the knitted document

- First, we'll start with the function stargazer() from the package stargazer
- The first argument of stargazer() is a regression result
- We also include the arguments **echo = FALSE** and **message = FALSE** in the code block to omit printing the code and messages that appear when loading stargazer
- In **stargazer()** we include **header = FALSE** to omit printing stargazer metadata

**Important:** When using external packages in RMarkdown, you need to have them loaded in a code block regardless of if they're already loaded in your current session. Libraries have to load again for each knit.

```
``{r, echo = FALSE, message = FALSE, results = "asis"}
Loading stargazer
library(stargazer)
```

```
Creating a simple regression
model <- lm(mpg ~ cyl + hp, data = mtcars)</pre>
```

```
Printing it with stargazer
stargazer(model, header = FALSE) # add: type = "html" if knitting to HTML
...
```

		Dependent variable:
<pre>{r, echo = FALSE, message = FALSE, results = "asis"}</pre>		mpg
# Loading stargazer	cyl	$-2.265^{***}$
(stargazer)		(0.576)
# Creating a simple regression	hp	-0.019
model <- lm(mpg ~ cyl + hp, data = mtcars)		(0.015)
<pre># Printing it with stargazer</pre>	Constant	36.908***
stargazer(model, header = FALSE)		(2.191)
	Observations	32
	$\mathbb{R}^2$	0.741
	Adjusted R <sup>2</sup>	0.723
	Residual Std. Error	3.173 (df = 29)
	F Statistic	$41.422^{***}$ (df = 2; 29)

Note:

Table 2:

\*p<0.1; \*\*p<0.05; \*\*\*p<0.01

#### Exercise 6 (() 3 min)

- 1. Create a new header named **Regressions Stargazer** in **r-markdown- template.Rmd**
- 2. Add a new code block with the arguments echo = FALSE and results = "asis"
- 3. Load stargazer in the code block
- 4. Add a regression of the variable mpg on wt and hp
- 5. Use stargazer's arguments header = FALSE, title = "your\_title" and

omit = c("Constant") to customize your table

If your output is HTML instead of PDF, include the argument type =
 "html" in stargazer()

# Regressions - Stargazer

• • •

Table 2: Best table eve
-------------------------

	Dependent variable:
	mpg
wt	$-3.878^{***}$
	(0.633)
hp	$-0.032^{***}$
	(0.009)
Observations	32
$\mathbb{R}^2$	0.827
Adjusted $\mathbb{R}^2$	0.815
Residual Std. Error	2.593 (df = 29)
F Statistic	$69.211^{***}$ (df = 2; 29)
Note:	*p<0.1; **p<0.05; ***p<0.01

- Remember huxtable? we can also use it to include regression tables in R Markdown
- The advantage of using huxtable compared to stargazer is that we don't have to define the type of output we're generating with R Markdown. huxtable automatically detects it and will transform the output as needed in the resulting document
- **huxtable** has an important disadvantage, though: it requires to install external libraries in your local LaTeX installation

• Conveniently, the library **huxtable** has a function that handles that installation for us (needed only if you're knitting to PDF)

# Only if you're knitting to PDF: huxtable::install\_latex\_dependencies()

• Once this finishes, we can use **huxtable** with R Markdown

- For regressions, we use the function huxreg() as in the example below
- Note that the option **results = "asis"** is not used with **huxtable**

```
```{r, echo = FALSE, warning = FALSE}
library(huxtable)
model <- lm(mpg ~ wt + hp, data = mtcars)
huxreg(model)</pre>
```

- For regressions, we use the function huxreg() as in the example below
- Note that the option **results = "asis"** is not used with **huxtable**

			(1)
		(Intercept)	37.227 ***
			(1.599)
{r, echo = FALSE, warning = FALSE}		wt	-3.878 ***
<pre>model <- lm(mpg ~ wt + hp, data = mtcars)</pre>			(0.633)
huxreg(model)		hp	-0.032 **
			(0.009)
		Ν	32
		R2	0.827
		logLik	-74.326
		AIC	156.652
		*** p < 0.001; **	p < 0.01; * $p < 0.05$.

Exercise 7: Now with Huxtable (() 2 min)

- 1. Create a new header named **Regressions Huxtable** in **r-markdown-**template.Rmd
- 2. Add a new code block with the argument **echo = FALSE**
- 3. Load huxtable in the code block
- 4. Add a regression table of the variable mpg on wt and hp using huxreg()
- 5. Use huxreg's argument omit_coefs = c("(Intercept)") to customize
 your table

Regressions - Huxtable

• • •

	(1)
wt	-3.878 ***
	(0.633)
hp	-0.032 **
	(0.009)
Ν	32
R2	0.827
logLik	-74.326
AIC	156.652

*** p < 0.001; ** p < 0.01; * p < 0.05.

If you want to include a title in your regression, use the command
 set_caption() with the result of huxreg() as argument

Table 3: Another nice table

	(1)
wt	-3.878 ***
	(0.633)
hp	-0.032 **
	(0.009)
Ν	32
R2	0.827
logLik	-74.326
AIC	156.652

*** p < 0.001; ** p < 0.01; * p < 0.05.

Thank you!
Annex

Annex - Opening a new R Markdown in R Studio

- Go to File > New File > R Markdown
- You can register the author name and the document title. This can be changed later if needed
- You can also define the default output format (HTML, PDF, Word). This can also be changed later
- Selecting **DK** will generate a template with document sections and code blocks that you can modify
- Selecting **Create Empty Document** will ignore the author, title, and output format registered and will result in a completely blank R Markdown document

Annex - Author, title, and output type

- The section enclosed in --- at the beginning of the document can contain the author, title, and default output format
- You can add the author and document title with **author**: **NAME** and **title**: TITLE
- You can also change the default output format. Some options are:
 - output: html_document
 - output: pdf_document
 - output: word_document
 - output: beamer_presentation

Annex - Naming R code blocks

- You can name R code blocks if you add the name after the **r** in the initial brackets
- The example below has the name **my-r-code**

```
```{r my-r-code}
summary(mtcars$mpg)
```
```

Annex - Naming R code blocks

This is very convenient to debug code blocks by clicking on Output under the
 R Markdown tab of the console, in case your file has an error

| Console | Terminal × | R Markdown $	imes$ | Jobs × | | | |
|----------------------------|--|---------------------|---------|--|---------|---------------|
| 🐑/Pre | sentations/07-r- | markdown.Rmd | | | | Output Issues |
| List o
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Annex - Including images

- The Markdown syntax to include images is: ![Image name](path/to/image)
- For example:

![R logo](img/r-markdown/r-logo.jpg)

• Renders:



Annex - Including a LaTeX preamble in a PDF doc

- If you want to further customize a PDF document in R Markdown and you're familiar with LaTeX, you can include a LaTeX preamble that will be executed when you knit your document
- To enable this feature, replace output: pdf_document with the following code in the section enclosed by the three dashes (---) at the beginning of your document

output:

```
pdf_document:
    includes:
        in_header: "preamble.tex"
```

Annex - Complete regression table using Stargazer

```
```{r, echo = FALSE, message = FALSE, results = "asis"}
library(stargazer)
reg1 <- lm(mpg ~ wt + hp, data = mtcars)</pre>
reg2 <- lm(mpg ~ wt + hp + factor(gear), data = mtcars)</pre>
reg3 <- lm(gsec ~ wt + hp, data = mtcars)</pre>
reg4 <- lm(gsec ~ wt + hp + factor(gear), data = mtcars)</pre>
stargazer(reg1,
 reg2.
 reg3.
 reg4.
 title = "Best table ever".
 keep = c('wt', 'hp'),
 covariate.labels = c('Weight',
 'Horsepower'),
 dep.var.labels = c('Miles per Gallon',
 '1/4 Mile Time').
 dep.var.caption = '',
 add.lines = list(c('N Gears FE', 'No', 'Yes', 'No', 'Yes')).
 keep.stat = c('n', 'adj.rsq'),
 header = FALSE.
 notes = 'Standard errors in parentheses')
```

• • •

	Miles pe	er Gallon	1/4 Mile Time	
	(1)	(2)	(3)	(4)
Weight	$-3.878^{***}$ (0.633)	$-3.239^{***}$ (0.878)	$\begin{array}{c} 0.942^{***} \\ (0.266) \end{array}$	$0.747^{*}$ (0.371)
Horsepower	$-0.032^{***}$ (0.009)	$-0.035^{***}$ (0.013)	$-0.027^{***}$ (0.004)	$-0.023^{***}$ (0.005)
N Gears FE	No	Yes	No	Yes
Observations	32	32	32	32
Adjusted $\mathbb{R}^2$	0.815	0.811	0.628	0.616
Note:		*p< Stan	<0.1; **p<0.0 dard errors in	5; ***p<0.01 parentheses

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## Annex - Complete regression table using Stargazer

	Miles per Gallon		1/4 Mile Time	
	(1)	(2)	(3)	(4)
Weight	$-3.878^{***}$	$-3.239^{***}$	$0.942^{***}$	$0.747^{*}$
-	(0.633)	(0.878)	(0.266)	(0.371)
Horsepower	$-0.032^{***}$	$-0.035^{***}$	$-0.027^{***}$	$-0.023^{***}$
	(0.009)	(0.013)	(0.004)	(0.005)
N Gears FE	No	Yes	No	Yes
Observations	32	32	32	32
Adjusted $\mathbb{R}^2$	0.815	0.811	0.628	0.616

Table 1: Best table ever

Note:

\*p<0.1; \*\*p<0.05; \*\*\*p<0.01 Standard errors in parentheses

### Annex - Looking ahead

- Markdown guide
- R Markdown: The Definitive Guide
- An introduction to Stata Markdown
- Stargazer official manual
- Introduction to Huxtable