# 02 – Getting Oriented

**Kieran Healy** 

January 23, 2024

## Motivation

## Technical computing is often frustrating



## What is this?



Two Revolutions in Computing

## What everyday computing is now



Touch-based user interface Foregrounds a single application Dislikes multi-tasking Hides the *file system* "Laundry Pile" user model of where things are stored

## Where technical computing lives





Windows and pointers. Multi-tasking, multiple windows. Exposes and leverages the *file system*. Many specialized tools in concert. Underneath, it's the 1970s, *UNIX*, and the command-line. *Cabinets, drawers, and files* model of

where things are stored

## Where technical computing lives

This toolset is by now really good!

Free! Open! Powerful!

Friendly communities! Lots of information! Many resources!

But: grounded in a UI paradigm that is increasingly far away from the everyday use of computing devices So why do we use this stuff?







## "Office" vs "Engineering" approaches

What is "real" in your project? What is the final output? How is it produced? How are changes managed?

## **Different Answers**

#### **Office model**

Formatted documents are real.

Intermediate outputs are cut and pasted into documents.

Changes are tracked inside files.

Final output is often in the same format you've been working in, e.g. a Word file, or a PDF.

## **Engineering model**

Plain-text files are real.

Intermediate outputs are produced via code, often inside documents.

Changes are tracked outside files, at the level of a project.

Final outputs are assembled programmatically and converted to some desired format.

## Different strengths and weaknesses

#### Office model

Everyone knows Word, Excel, or Google Docs.

"Track changes" is powerful and easy.

Hm, I can't remember how I made this figure

Where did this table of results come from?

```
Paper_edits_FINAL_kh-
1.docx
```

## **Engineering model**

Plain text is highly portable. Push button, recreate analysis. JFC Why can't I do this simple thing?

> Object of type 'closure' is not subsettable

# Each approach generates solutions to its own problems

The File System

# The traditional analog



The problem is, you probably have never have actually used one of these!

Illustration: Shelley Powers et al. Unix Power Tools, 3rd ed. (Sebastopol, CA: O'Reilly Media, 2002), 21.

## The file cabinet!



## The file cabinet!



#### Index cards



#### Index cards



## Automating information processing



## Automating information processing



## Automating information processing



## Hollerith machines

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## **Hollerith Machines**



## Hollerith machines

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## Hollerith machines

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## Hollerith Operators



## Hollerith Operators



## IBM punch cards



## IBM punch cards













High Density Recording—All MODEL 2 Series 4000 Files are capable of writing and reading back data reliably at packing densities up to a nominal 600 bits/inch when recording in phase-modulation mode. This means you can store 32,860,416 bits per data surface—or up to 1,643,020,800 bits in the 26-disc mass memory above! Electronic Interface—Write, read, head select, and logic electronic circuit modules are mounted in hinged racks conveniently located in separate air-cooled bay accessible through center panel. Systems can be designed to meet your specific requirements with respect to data rates, control signals, capacity, and mode of operation.

Environmental Controls—All MODEL 2 disc files are equipped with an environmental control unit designed especially to minimize air contamination and maintain the proper environment for optimum file performance. Attached to rear of file, each unit provides full-flow mechanical filtration and self-contained mechanical cooling.

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control controls - running of the sported cabinet as shown with "C" size files and enclosed in main frame of "B" size files, this compact power control unit features point-to-point connections for all electrical, hydraulic, and pneumatic elements in accordance with recommendations of Underwriters' Laboratories, Inc. Dual/Rapid Positioning—New rapid random-access system consists of an independent, open-loop, electrohydraulic digital head positioner for each side of the file—with each positioner controlled by separate signals. This permits use of each module as an individual memory, provides greater versatility and faster access.

Signal Preamplifier—Magnetic heads can terminate in a preamplifier /switching device mounted near the related head bar. Each services 12 heads and provides gain factor of approximately 5 to playback values fed to read amplifiers. This arrangement reduces cabling impedance, improves resonance frequency, minimizes noise.

#### Input/Output

#### A late-model teletype (TTY) machine



## Input/Output

#### The DEC VT-100 Terminal



## Input/Output


## Back to the file system

# File system hierarchy



### Stepping back

Your computer stores files and does stuff, or "runs commands"

Files are stored in a large hierarchy of folders

The Finder or Window Manager or File Manager is a visual metaphor for representing this hierarchy of files and for running commands on them. But you can also do these things via text-based commands delivered from a prompt, console, or "command line".

Software like RStudio has a lot of these "old school" computing elements

# Getting to know R and RStudio

# We want to draw graphs reproducibly



### Abstraction in software

#### Less

Easy things are awkward Hard things are straightforward Really hard things are possible

### Abstraction in software

#### Less

Easy things are awkward Hard things are straightforward Really hard things are possible

#### More

Easy things are trivial Hard things are awkward Really hard things are impossible



D3	
Grid	
ggplot	
Stata	
Excel	

## The RStudio IDE

### An IDE for R



### An IDE for Meals

Jacques Pépin Heart Soul

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RStudio schematic overview

Think in terms of Data + Transformations, written out as code, rather than a series of pointand-click steps

### Our starting data + our code is what's "real" in our projects, not the final output or any intermediate objects

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# Use RMarkdown to produce and reproduce work

### Where we want to end up

#### **Covid Cases**

Kieran Healy

#### Introduction

We will look at some data from the covdata package.

cname	cases
France	2376852
United Kingdom	1849403
United States	16256754

#### A little graph

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#### PDF out



### Where we want to end up

#### **Covid Cases**

AUTHOR
Kieran Healy

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#### HTML out

### Where we want to end up



Word out

### How to get there?

# COVID covidcases.R
# Get data from ECDC
# FIXME Write a fn to
# do this data raw <- read csv[url]
# Clean it
# Notes on the cleaning
# process.
covid <- data raw %>%
mutate() %>%
select[…]
# Make some plots
covia %>%
geom_line[]

We could write an **R script** with some notes inside, using it to create some figures and tables, paste them into our document.

This will work, but we can do better.

### We can make this ...

#### 1. Lorem Ipsum

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### ... by writing this

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library(ggplot2)
tea <- rnorm(100)
biscuits <- tea + rnorm(100, 0, 1.3)
data <- data.frame(tea, biscuits)
p <- ggplot(data, aes(x = tea, y = biscuits)) +
    geom_point() +
    geom_smooth(method = "lm") +
    labs(x = "Tea", y = "Biscuits") + theme_bw()
print(p)</pre>
```

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### The code gets replaced by its output

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library(ggplot2)
tea <- rnorm(100)
biscuits <- tea + rnorm(100, 0, 1.3)
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print(p)</pre>
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author: "Kieran Healy"
format: html
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#| echo: false
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# Don't include code chunks in the document
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library(tidyverse)
library(covdata)
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## Introduction
We will look at some data from the `covdata` package.
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#| label: data
covnat_daily ▷
  filter(iso3 %in% c("USA", "GBR", "FRA")) ▷
  group_by(cname) ▷
  summarize(cases = sum(cases)) >
  knitr::kable()
× × ×
```

Markdown document



Markdown document annotated



This approach has its limitations, but it's very useful and has many benefits.

### Basic markdown summary

Desired style	Use the following Markdown annotation
Heading 1	# Heading 1
Heading 2	## Heading 2
Heading 3	#### Heading 3 (Actual heading styles will vary.)
Paragraph	Just start typing
Bold	**Bold**
Italic	*Italic*
Images	[Alternate text for image](path/image.jpg)
Hyperlinks	[Link text](https://www.visualizingsociety.com/)
Unordered Lists	
- First	- First
- Second.	- Second
- Third	- Third
Ordered Lists	
1. First	1. First
2. Second.	2. Second
3. Third	3. Third
Footnote. <sup>1</sup>	Footnote[^notelabel]

<sup>1</sup>The note's content. [^notelabel] The note's content.

### The right frame of mind

This is like learning how to drive a car, or how to cook in a kitchen ... or learning to speak a language.

After some orientation to what's where, you will learn best by *doing*.

Software is a pain, but you won't crash the car or burn your house down.

# TYPE OUT YOUR CODE BY HAND


Ever tried. Ever failed. No matter. Try again. Fail again. Fail better.

Samuel Beckett, early data analyst

Samuel Beckett

# **GETTING ORIENTED**

# Loading the tidyverse libraries

### library(tidyverse)

The tidyverse has several components.

We'll return to this message about Conflicts later.

Again, the code and messages you see here is actual R output, produced at the same time as the slide.

## **Tidyverse components**

- library(tidyverse)
- Loading tidyverse: ggplot2
- Loading tidyverse: tibble
- Loading tidyverse: tidyr
- Loading tidyverse: readr
- Loading tidyverse: purrr
- Loading tidyverse: dplyr

Call the package and ...

- $\triangleleft$  Draw graphs
- $\lhd$  Nicer data tables
- $\triangleleft$  Tidy your data
- $\lhd$  Get data into R
- $\lhd$  Fancy Iteration
- $\lhd\,$  Action verbs for tables

# What R looks like

## **Code you can type and run:**

## Inside code chunks, lines beginning with a # character are comments
## Comments are ignored by R

my\_numbers  $\leftarrow$  c(1, 1, 2, 4, 1, 3, 1, 5) # Anything after a # character is ignored as well

## Output:

my\_numbers
[1] 1 1 2 4 1 3 1 5

This is equivalent to running the code above, typing my\_numbers at the console, and hitting enter.

## What R looks like

By convention, code output in documents is prefixed by ##

Also by convention, outputting vectors, etc, gets a counter keeping track of the number of elements. For example,

#### letters

[1] "a" "b" "c" "d" "e" "f" "g" "h" "i" "j" "k" "l" "m" "n" "o" "p" "q" "r" "s" [20] "t" "u" "v" "w" "x" "y" "z"

# Some things to know about R

## **0. It's a calculator**

## Arithmetic

(31	*	12)	/	2^4	
[1]	23	.25			

## sqrt(25)

[1] 5

## log(100)

[1] 4.60517

## log10(100)

[1] 2

## **0. It's a calculator**

Arithmetic	Logic
(31 * 12) / 2^4	4 < 10
[1] 23.25	[1] TRUE
sqrt(25)	4 > 2 & 1 > 0.5 # The "&" means "and"
[1] 5	[1] TRUE
log(100)	4 < 2   1 > 0.5 # The " " means "or"
[1] 4.60517	[1] TRUE
log10(100)	4 < 2   1 < 0.5
[1] 2	[1] FALSE

## **Boolean and Logical operators**

Logical equality and inequality (yielding a TRUE or FALSE result) is done with = and  $\neq$ . Other logical operators include <, >,  $\leq$ ,  $\geq$ , and ! for negation.



```
## Error in 2 = 2 : invalid (do_set) left-hand side to assignment
```

 $3 \neq 7$  # Write `!` and then `=` to make ` $\neq$ `

[1] TRUE

# **1. Everything in R has a name**

my\_numbers # We created this a few minutes ago

[1] 1 1 2 4 1 3 1 5

letters *# This one is built-in* 

[1] "a" "b" "c" "d" "e" "f" "g" "h" "i" "j" "k" "l" "m" "n" "o" "p" "q" "r" "s" [20] "t" "u" "v" "w" "x" "y" "z"

pi *# Also built-in* 

[1] 3.141593

## Some names are forbidden

## Or it's a *really* bad idea to try to use them

TRUE FALSE Inf NaN NA NULL		
for if while break function		

# **2.** Everything is an object

## There are a few built-in objects:

### letters

```
[1] "a" "b" "c" "d" "e" "f" "g" "h" "i" "j" "k" "l" "m" "n" "o" "p" "q" "r" "s"
[20] "t" "u" "v" "w" "x" "y" "z"
```

#### pi

[1] 3.141593

#### LETTERS

[1] "A" "B" "C" "D" "E" "F" "G" "H" "I" "J" "K" "L" "M" "N" "O" "P" "Q" "R" "S"

[20] "T" "U" "V" "W" "X" "Y" "Z"

## **3. You can create objects**

In fact, this is mostly what we will be doing.

Objects are created by assigning a thing to a name:

```
## name ... gets ... this stuff
my_numbers ← c(1, 2, 3, 1, 3, 5, 25, 10)
## name ... gets ... the output of the function `c()`
your_numbers ← c(5, 31, 71, 1, 3, 21, 6, 52)
```

The **c()** function *combines* or *concatenates* things

# The assignment operator

The assignment operator performs the action of creating objects

Use a keyboard shortcut to write it:

Press option *and* - on a Mac

Press alt and - on Windows

## Assignment with =

You can use = as well as  $\leftarrow$  for assignment.

my_numbers = c(1, 2, 3, 1, 3, 5, 25)								
my_numbers								
[1] 1 2 3 1 3 5 25								

On the other hand, = has a different meaning when used in functions.

I'm going to use  $\leftarrow$  for assignment throughout.

Be consistent either way.

# 4. You do things with functions

## this object... gets ... the output of this function  $my_numbers \leftarrow c(1, 2, 3, 1, 3, 5, 25, 10)$ 

your\_numbers  $\leftarrow$  c(5, 31, 71, 1, 3, 21, 6, 52)

my\_numbers

[1] 1 2 3 1 3 5 25 10

# 4. You do things with functions

Functions can be identified by the parentheses after their names.

my_numbers							
[1]	1	2	3	1	3	5 25 10	

### If you run this you'll get an error mean()

They take **inputs** to **arguments** 

They perform **actions** 

They produce, or return, **outputs** 

## mean(x = my\_numbers)

They take inputs to arguments

They perform **actions** 

They produce, or return, **outputs** 

# mean(x = my\_numbers) [1] C OF

[1] 6.25

## Get the mean of what? Of x.
## You need to tell the function what x is
mean(x = my\_numbers)

[1] 6.25

mean(x = your\_numbers)

[1] 23.75

If you don't *name* the arguments, R assumes you are providing them in the order the function expects.

mean(your\_numbers)

[1] 23.75

What arguments? Which order? Read the function's help page

help(mean)	
## quicker ?mean	

How to read an R help page?

Arguments often tell the function what to do in specific circumstances

```
missing_numbers \leftarrow c(1:10, NA, 20, 32, 50, 104, 32, 147, 99, NA, 45)
```

mean(missing\_numbers)

[1] NA

mean(missing\_numbers, na.rm = TRUE)

[1] 32.44444

Or select from one of several options

## Look at ?mean to see what `trim` does
mean(missing\_numbers, na.rm = TRUE, trim = 0.1)

[1] 27.25

## There are all kinds of functions. They return different things.

<pre>summary(my_numbers)</pre>									
Min.	1st Qu.	Median	Mean 3	rd Qu.	Max.				
1.00	1.75	3.00	6.25	6.25	25.00				

You can assign the output of a function to a name, which turns it into an object. (Otherwise it'll send its output to the console.)

```
my_summary ← summary(my_numbers)
my_summary
Min. 1st Qu. Median Mean 3rd Qu. Max.
1.00 1.75 3.00 6.25 6.25 25.00
```

Objects hang around in your work environment until they are overwritten by you, or are deleted.

## rm() function removes objects
rm(my\_summary)
my\_summary
## Error: object 'my\_summary' not found

## **Functions can be nested**

#### c(1:20)

[1] 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

#### mean(c(1:20))

[1] 10.5

# summary(mean(c(1:20))) Min. 1st Qu. Median Mean 3rd Qu. Max. 10.5 10.5 10.5 10.5

#### names(summary(mean(c(1:20))))

[1] "Min." "1st Qu." "Median" "Mean" "3rd Qu." "Max."

## length(names(summary(mean(c(1:20)))))

[1] 6

Nested functions are evaluated from the inside out.

# Use the pipe operator: >

Instead of deeply nesting functions in parentheses, we can use the *pipe operator*:

 $c(1:20) \triangleright mean() \triangleright summary() \triangleright names() \triangleright length()$ 

[1] 6

Read this operator as "and then"

# Use the pipe operator: >

## Better, vertical space is free in R:

c(1:20) ▷ mean() ▷ summary() names() ▷ length()	⊳		
[1] 6			

# Pipelines make code more readable

Not great, Bob:

serve(stir(pour\_in\_pan(whisk(crack\_eggs(get\_from\_fridge(eggs), into = "bowl"), len = 40), temp = "med-high")))

Notice how the first thing you read is the last operation performed.

## Pipelines make code more readable

We can use vertical space and indents, but it's really not much better:

```
serve(
   stir(
     pour_in_pan(
        whisk(
            crack_eggs(
               get_from_fridge(eggs),
               into = "bowl"),
        len = 40),
        temp = "med-high")
   )
)
```

## Pipelines make code more readable

## Much nicer:

```
eggs ▷
get_from_fridge() ▷
crack_eggs(into = "bowl") ▷
whisk(len = 40) ▷
pour_in_pan(temp = "med-high") ▷
stir() ▷
serve()
```

We'll still use nested parentheses quite a bit, often in the context of a function working inside a pipeline. But it's good not to have too many levels of nesting.

# The other pipe: %>%

The Base R pipe operator,  $\triangleright$  is a relatively recent addition to R.

Piping operations were originally introduced in a package called called magrittr, where it took the form %>%

# The other pipe: %>%

The Base R pipe operator, ▷ is a relatively recent addition to R.

Piping operations were originally introduced in a package called called magrittr, where it took the form %>%

It's been so successful, a version of it has been incorporated into Base R. For our puposes, they're the same.
# Functions are bundled into packages

# Packages are loaded into your working environment using the library() function:

## A package containing a dataset rather than functions
library(gapminder)

#### gapminder

#	А	tibb	le:	1,	,704	×	6
---	---	------	-----	----	------	---	---

	country	continent	year	lifeExp	рор	gdpPercap
	<fct></fct>	<fct></fct>	<int></int>	<dbl></dbl>	<int></int>	<dbl></dbl>
1	Afghanistan	Asia	1952	28.8	8425333	779.
2	Afghanistan	Asia	1957	30.3	9240934	821.
3	Afghanistan	Asia	1962	32.0	10267083	853.
4	Afghanistan	Asia	1967	34.0	11537966	836.
5	Afghanistan	Asia	1972	36.1	13079460	740.
6	Afghanistan	Asia	1977	38.4	14880372	786.
7	Afghanistan	Asia	1982	39.9	12881816	978.
8	Afghanistan	Asia	1987	40.8	13867957	852.
9	Afghanistan	Asia	1992	41.7	16317921	649.
10	Afghanistan	Asia	1997	41.8	22227415	635.
#	i 1.694 more	rows				

# Functions are bundled into packages

You need only *install* a package once (and occasionally update it):

## Do at least once for each package. Once done, not needed each time.
install.packages("palmerpenguins", repos = "http://cran.rstudio.com")

## Needed sometimes, especially after an R major version upgrade. update.packages(repos = "http://cran.rstudio.com")

# Functions are bundled into packages

But you must *load* the package in each R session before you can access its contents:

## To load a package, usually at the start of your RMarkdown document or script file library(palmerpenguins) penguins

# A tibble: 344 × 8

	species	island	<pre>bill_length_mm</pre>	<pre>bill_depth_mm</pre>	flipper_length_mm	body_mass_g
	<fct></fct>	<fct></fct>	<dbl></dbl>	<dbl></dbl>	<int></int>	<int></int>
1	Adelie	Torgersen	39.1	18.7	181	3750
2	Adelie	Torgersen	39.5	17.4	186	3800
3	Adelie	Torgersen	40.3	18	195	3250
4	Adelie	Torgersen	NA	NA	NA	NA
5	Adelie	Torgersen	36.7	19.3	193	3450
6	Adelie	Torgersen	39.3	20.6	190	3650
7	Adelie	Torgersen	38.9	17.8	181	3625
8	Adelie	Torgersen	39.2	19.6	195	4675
9	Adelie	Torgersen	34.1	18.1	193	3475
10	Adelie	Torgersen	42	20.2	190	4250
# i	i 334 moi	re rows				

# i 2 more variables: sex <fct>, year <int>

Let's Go!

### Like before





#### What we did

library(tidyverse)

library(gapminder)

Load the packages we need: tidyverse and gapminder

#### What we did

New object named **p** gets the output of the ggplot() *function*, given these *arguments* 

Notice how one of the arguments, mapping, is itself taking the output of a function named aes()

### What we did

#### p + geom\_point()

Show me the output of the p object and the geom\_point() function.
The + here acts just like the ▷ pipe, but for ggplot functions only. (This is

an accident of history.)

# And what is R doing?

R objects are just lists of stuff to use or things to do

# Objects are like Bento Boxes



country	94 x 6 continent	year	lifeExp		— Represent or Map
< <u>fctr</u> >	< <u>fctr</u> >	<int></int>	< <u>dbl</u> >	<i< td=""><td>"lifeExp" using the x axis</td></i<>	"lifeExp" using the x axis
1 Argnanistan 2 Afghanistan	Asia	1952	20.222	8425	
2 Arghanistan 2 Afghanistan	ASIa	1957	21 007	9240	
4 Afghanistan	Asia	1967	34 020	11537	— Represent or Map
5 Afghanistan	Asia	1972	36.088	13079	"ada Dencen" using the subscie
6 Afghanistan	Asia	1977	38,438	14880	"goppercap" using the y axis
7 Afghanistan	Asia	1982	39.854	12881	
8 Afghanistan	Asia	1987	40.822	13867	- Penresent or Man
9 Afghanistan	Asia	1992	41.674	16317	
10 Afghanistan	Asia	1997	41.763	22227	"continent" using colors
Just dea automat	l with ti ically fo	nese ' r now	for me v, robo	t	Labels
Just dea automat scales	al with th ically fo	hese rnow ordi	for me 1, robo .nate:	t S	Labels — Label the x axis "GDP per Capita"
Just dea automat scales plot_env	al with ti ically fo co th	heser rnow ordi eme	for me v, robo .nate:	t S	Labels - Label the x axis "GDP per Capita" - Label the y axis "Life Expectancy"
Just dea automat scales plot_env	l with ti ically fo co th	hese rnow ordi eme	for me /, robo .nate:	t S	Labels - Label the x axis "GDP per Capita" - Label the y axis "Life Expectancy"

The p object

Environment	History	Connections	Git	Tutorial			
🕣 🕞 🖙 Import Dataset 🔹 🕐 297 MiB 👻 💉							
R 🗸 🛑 Global Environment 🗸							
Data							
♥ List of 9							
Functions							
		~					

Peek in with the object inspector

<b>Q</b> , p ×							
Show Attributes							
Name	Туре	Value					
🗢 p	list [9] (S3: gg, ggplot)	List of length 9					
🜔 data	list [1704 x 6] (S3: tbl_df, tbl,	A tibble with 1704 rows and 6 columns					
layers	list [0]	List of length 0					
Scales	environment [1] (S3: ScalesLis	<environment: 0x11f8106b0=""></environment:>					
Mapping	list [2] (S3: uneval)	List of length 2					
theme	list [0]	List of length 0					
coordinates	environment [5] (S3: CoordCa	<environment: 0x11f8150c8=""></environment:>					
🕟 facet	environment [2] (S3: FacetNul	<environment: 0x12a81ab00=""></environment:>					
plot_env	environment [6]	<environment: r_globalenv=""></environment:>					
Iabels	list [2]	List of length 2					

Peek in with the object inspector

# Core concepts: mappings + geoms

The core idea, which we'll focus on more formally next week, is that we have *data*, arranged in columns, that we want to represent visually on some sort of plot.

That means we need a *mapping* — a link, a connection, a representation — between things in our table and stuff we can draw. That is what the *mapping* argument is for.

And we need a *geom* — a kind of plot, a particular sort of graph — that we draw with that.

#### **Practical examples**

Let's try some live examples ...How might we improve or extend this graph based on the data we have? Or how might we look at it differently?

