TIBCO Spotfire S+® 8.2 for Windows® User's Guide

November 2010

TIBCO Software Inc.

IMPORTANT INFORMATION

software may be available on multiple operating systems. However, not all operating system platforms for a specific software version are released at the same time. Please see the readme.txt file for the availability of this software version on a specific operating system platform.

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Reference

The correct bibliographic reference for this document is as follows:

TIBCO Spotfire S+® 8.2 for Windows® User’s Guide TIBCO Software Inc.

Technical Support

For technical support, please visit http://spotfire.tibco.com/support and register for a support account.

TIBCO SPOTFIRE S+ BOOKS

Note about Naming
Throughout the documentation, we have attempted to distinguish between the language (S-PLUS) and the product (Spotfire S+). • "S-PLUS" refers to the engine, the language, and its constituents (that is objects, functions, expressions, and so forth). • "Spotfire S+" refers to all and any parts of the product beyond the language, including the product user interfaces, libraries, and documentation, as well as general product and language behavior.

The TIBCO Spotfire S+® documentation includes books to address your focus and knowledge level. Review the following table to help you choose the Spotfire S+ book that meets your needs. These books are available in PDF format in the following locations:

- In your Spotfire S+ installation directory (**SHOME\help** on Windows, **SHOME/doc** on UNIX/Linux).
- In the Spotfire S+ Workbench, from the **Help ▶ Spotfire S+ Manuals** menu item.
- In Microsoft® Windows®, in the Spotfire S+ GUI, from the **Help ▶ Online Manuals** menu item.

Spotfire S+ documentation.

Information you need if you...	See the...
Must install or configure your current installation of Spotfire S+; review system requirements.	*Installtion and Administration Guide*
Want to review the third-party products included in Spotfire S+, along with their legal notices and licenses.	*Licenses*

Spotfire S+ documentation. (Continued)

Information you need if you...	**See the...**
Are new to the S language and the Spotfire S+ GUI, and you want an introduction to importing data, producing simple graphs, applying statistical models, and viewing data in Microsoft Excel®.	*Getting Started Guide*
Are a new Spotfire S+ user and need how to use Spotfire S+, primarily through the GUI.	*User's Guide*
Are familiar with the S language and Spotfire S+, and you want to use the Spotfire S+ plug-in, or customization, of the Eclipse Integrated Development Environment (IDE).	*Spotfire S+ Workbench User's Guide*
Have used the S language and Spotfire S+, and you want to know how to write, debug, and program functions from the **Commands** window.	*Programmer's Guide*
Are familiar with the S language and Spotfire S+, and you want to extend its functionality in your own application or within Spotfire S+.	*Application Developer's Guide*
Are familiar with the S language and Spotfire S+, and you are looking for information about creating or editing graphics, either from a **Commands** window or the Windows GUI, or using Spotfire S+ supported graphics devices.	*Guide to Graphics*
Are familiar with the S language and Spotfire S+, and you want to use the Big Data library to import and manipulate very large data sets.	*Big Data User's Guide*
Want to download or create Spotfire S+ packages for submission to the Comprehensive S-PLUS Archive Network (CSAN) site, and need to know the steps.	*Guide to Packages*

Spotfire S+ documentation. (Continued)

Information you need if you...	**See the...**
Are looking for categorized information about individual S-PLUS functions.	*Function Guide*
If you are familiar with the S language and Spotfire S+, and you need a reference for the range of statistical modelling and analysis techniques in Spotfire S+. Volume 1 includes information on specifying models in Spotfire S+, on probability, on estimation and inference, on regression and smoothing, and on analysis of variance.	*Guide to Statistics, Vol. 1*
If you are familiar with the S language and Spotfire S+, and you need a reference for the range of statistical modelling and analysis techniques in Spotfire S+. Volume 2 includes information on multivariate techniques, time series analysis, survival analysis, resampling techniques, and mathematical computing in Spotfire S+.	*Guide to Statistics, Vol. 2*

CONTENTS

INTRODUCTION 1

WELCOME TO SPOTFIRE S+!

Spotfire S+ is based on the latest version of the powerful, object-oriented S language originally developed at Lucent Technologies. S is a rich environment designed for interactive data discovery and is the only language created specifically for data visualization and exploration, statistical modeling, and programming with data.

Spotfire S+ continues to be the premier solution for your data analysis and technical graphing needs. The Microsoft Office-compatible user interface gives you point-and-click access to data manipulation, graphing, and statistics. With Spotfire S+, you can program interactively using the S-PLUS programming language.

In a typical Spotfire S+ session, you can:

- Import data from virtually any source.
- View and edit your data in a convenient **Data** window.
- Create plots with the click of a button.
- Control every detail of your graphics and produce stunning, professional-looking output for export to your report document.
- Perform statistical analyses from convenient dialogs in the menu system.
- Run analysis functions one at a time at the command line or in batches using the **Script** window.
- Create your own functions.
- Completely customize your user interface.

System Requirements

For a list of system requirements, see the file INSTALL.TXT in the installation directory.

Note

Spotfire S+ does not support Win32s (that is, Windows 3.1x), nor does it support Windows NT 3.51.

- Super VGA, or most other Windows-compatible graphics cards and monitors with a resolution of 800x600 or better.
- Microsoft mouse or other Windows-compatible pointing device.
- Windows-compatible printer (optional).
- A connection to the Internet, including a Web browser.

Running Spotfire S+

The following list describes the ways that you can launch Spotfire S+ in Windows:

- Start the Spotfire S+ for Windows Graphical User Interface (GUI) from the **Start** menu.
- Start the Spotfire S+ Workbench from the **Start** menu.
- Start the Windows Console from the **Start** menu.
- Start the Windows Console from a DOS command line for interactive use.
- Run the Console version from a Windows batch file using "Sqpe infile outfile".
- Run the Spotfire S+ GUI version from a Windows batch file using "Spotfire S+ BATCH".
- Run the Spotfire S+ GUI version from Automation via the Excel add-in, SPSS add-in, or a custom Automation application such as from PharSight®.
- Run the Spotfire S+ GUI version via DDE.
- Run the Console version via Connect/C++ or Connect/Java.

You can run Spotfire S+ for 32-bit Windows on a 64-bit Windows computer.

Important

Spotfire S+ for 64-bit Windows :

- Includes support for Spotfire S+ Batch, the Spotfire S+ Console and the Spotfire S+ Workbench. It does not include the Spotfire S+ GUI.
- Works only on computers running a 64-bit Windows operating systems. It does not work on computers running 32-bit Windows.

HELP, SUPPORT, AND LEARNING RESOURCES

There are a variety of ways to accelerate your progress with Spotfire S+. This section describes the learning and support resources available to Spotfire S+ users.

Online Help

Spotfire S+ offers an online HTML Help system to make learning and using Spotfire S+ easier. Under the **Help** menu, you will find help on how to use the Spotfire S+ graphical user interface. In addition, an extensive Language Reference provides detailed help on each function in the S-PLUS language. The Language Reference help can also be accessed through the **Commands** window by typing `help()` at the S-PLUS language prompt.

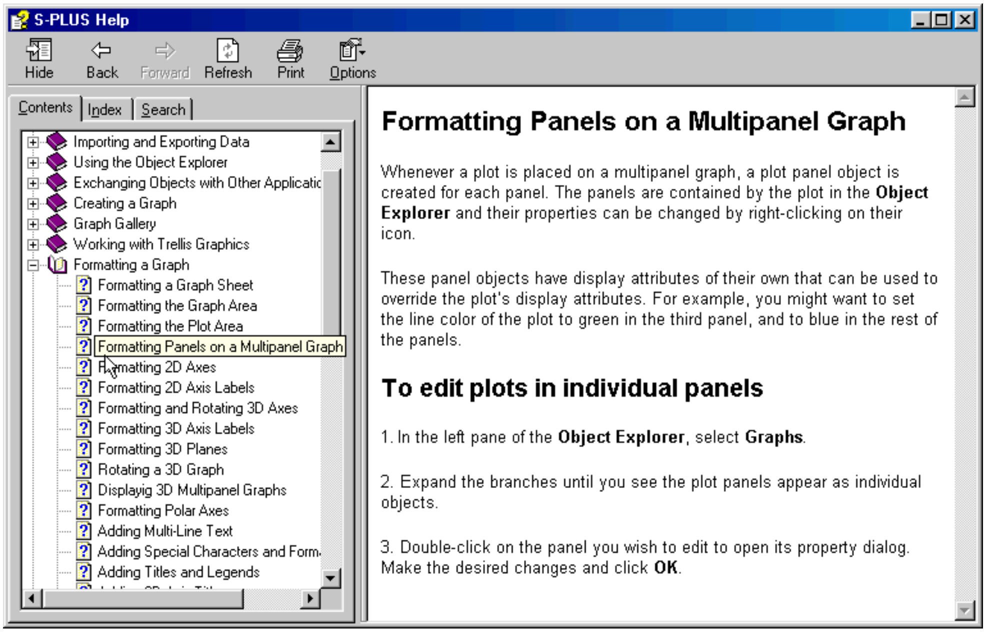
Context-sensitive help is available by clicking the **Help** button in dialogs or the context-sensitive **Help** button on toolbars, as well as by pressing the F1 key while Spotfire S+ is active.

HTML Help

HTML Help in Spotfire S+ is based on Microsoft Internet Explorer and uses an HTML window to display the help files. To access HTML Help, do one of the following:

- From the main menu, choose **Help ▶ Available Help ▶ TIBCO Spotfire S+ Help** for help on the GUI.
- From the main menu, choose **Help ▶ Available Help ▶ Language Reference** for help on the S-PLUS programming language.

As shown in Figure 1.1, the HTML help window has three main areas: the *toolbar*, the *left pane*, and the *right pane*.


S-PLUS Help
Hide
Back
Forward
Refresh
Print
Options
Contents
Index
Search
Importing and Exporting Data
Using the Object Explorer
Exchanging Objects with Other Applicatic
Creating a Graph
Graph Gallery
Working with Trellis Graphics
Formatting a Graph
Formatting a Graph Sheet
Formatting the Graph Area
Formatting the Plot Area
Formatting Panels on a Multipanel Graph
Formatting 2D Axes
Formatting 2D Axis Labels
Formatting and Rotating 3D Axes
Formatting 3D Axis Labels
Formatting 3D Planes
Rotating a 3D Graph
Displayig 3D Multipanel Graphs
Formatting Polar Axes
Adding Multi-Line Text
Adding Special Characters and Form
Adding Titles and Legends

Formatting Panels on a Multipanel Graph

Whenever a plot is placed on a multipanel graph, a plot panel object is created for each panel. The panels are contained by the plot in the **Object Explorer** and their properties can be changed by right-clicking on their icon.

These panel objects have display attributes of their own that can be used to override the plot's display attributes. For example, you might want to set the line color of the plot to green in the third panel, and to blue in the rest of the panels.

To edit plots in individual panels

1. In the left pane of the **Object Explorer**, select **Graphs**.

2. Expand the branches until you see the plot panels appear as individual objects.

3. Double-click on the panel you wish to edit to open its property dialog. Make the desired changes and click **OK**.

Figure 1.1: *The **Spotfire S+** help window.*

Using the toolbar

Table 1.1 lists the four main buttons on the help window toolbar (in some cases, you may see more).

Table 1.1: *Help window toolbar buttons.*

Button Name	Description
Hide (or **Show**)	If the button is labeled **Hide**, it hides the left pane, expanding the right pane to the full width of the help window. If the button is labeled **Show**, it shows the left pane and partitions the help window accordingly.
Back	Returns to previously viewed help topic.
Forward	Moves to next help topic.

Table 1.1: *Help window toolbar buttons. (Continued)*

Button Name	Description
Print	Prints the current help topic.

Using the left pane

Like the help window itself, the left pane is divided into three parts: the **Contents** tab, the **Index** tab, and the **Search** tab:

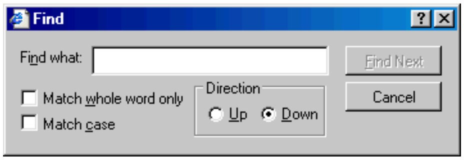
- The **Contents** tab organizes help topics by category so that related help files can be found easily. These categories appear as small book icons, labeled with the name of the category. To open a category, double-click the icon or label. To select a topic within the category, double-click its question-mark icon or the topic title.
- The **Index** tab lists available help topics by keyword. Keywords are typically function names for S-PLUS language functions and topic names for graphical user interface topics. Simply type in a keyword and HTML Help will find the keyword that most closely matches it. Click **Display** (or double-click the selected title) to display the help topic.
- The **Search** tab provides a full-text search for the entire help system. Simply type in a keyword, and all the help files containing that keyword are listed in a list box. Select the desired topic and click **Display** (or double-click the selected title) to display the help topic.

Using the right pane

The right pane is where the help information actually appears. It usually appears with both vertical and horizontal scrollbars, but you can expand the HTML Help window to increase the width of the right pane. Many help files are too long to be fully displayed in a single screen, so choose a convenient height for your HTML Help window and then use the vertical scrollbars to scroll through the text.

The right pane contains a search-in-topic feature. To use it:

1. Type CTRL-F to open the **Find** dialog (this dialog is a feature of HTML Help inherited from Internet Explorer).



2. Type your search string in the text field labeled **Find what**.
3. Click **Find Next**.

Help in the Commands and Script Windows

When working in the **Commands** window, you can get help for any command by using the `?` or `help` function. For example, to open the help file for `anova`, simply type:

```
> help(anova)
```

or

```
> ?anova
```

To get help for a command when working in a **Script** window, simply highlight the command and press F1.

Online Manuals

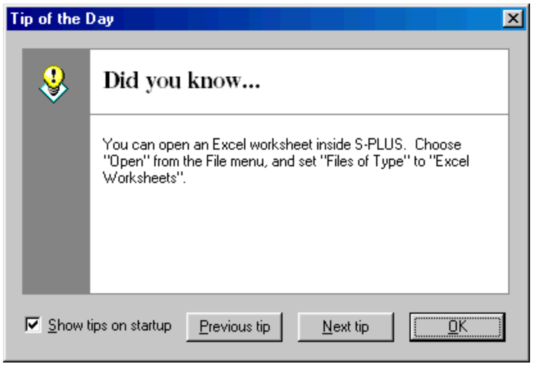
For a list of available manuals, see the section TIBCO Spotfire S+ Books on page iv. To view a manual online, choose **Help ▶ Online Manuals** from the main menu and select the desired title.

Note: Online versions of the documentation

The online manuals are viewed using Adobe Acrobat Reader, which can be installed as an option during the installation of Spotfire S+. It is generally useful to turn on *bookmarks* (under the View entry of the menu bar) while using Acrobat Reader, rather than rely on the contents at the start of the manuals. Bookmarks are always visible and can be expanded and collapsed to show just chapter titles or to include section headings.

Tip of the Day

To help speed your progress in Spotfire S+, a handy Tip of the Day appears by default each time you start the program. (See Figure 1.2.)



Did you know...

You can open an Excel worksheet inside S-PLUS. Choose "Open" from the File menu, and set "Files of Type" to "Excel Worksheets".

☑ Show tips on startup

Figure 1.2: *A Tip of the Day.*

You can also access the Spotfire S+ Tips of the Day at any time by choosing **Help ▶ Tip of the Day** from the main menu. If you prefer to turn off this feature, simply clear the **Show tips on startup** check box in the dialog.

Spotfire S+ on the Web

You can find Spotfire S+ on the TIBCO Web site at www.tibco.com. In these pages, you will find a variety of information, including:

- FAQ pages.
- The most recent service packs.
- Training course information.
- Product information.
- Information on classroom use and related educational materials.

Training Courses

TIBCO Spotfire Educational Services offers a number of courses designed to quickly make you efficient and effective at analyzing data with Spotfire S+. The courses are taught by professional statisticians and leaders in statistical fields. Courses feature a hands-on approach to learning, dividing class time between lecture and online exercises. All participants receive the educational materials used in the course, including lecture notes, supplementary materials, and exercise data on diskette.

Technical Support

For technical support, please visit http://spotfire.tibco.com/support and register for a support account.

Books Using Spotfire S+

General

Becker, R.A., Chambers, J.M., and Wilks, A.R. (1988). *The New S Language.* Wadsworth & Brooks/Cole, Pacific Grove, CA.

Burns, Patrick (1998). *S Poetry.* Download for free from http://www.seanet.com/~pburns/Spoetry.

Chambers, John (1998). *Programming with Data.* Springer-Verlag.

Krause, A. and Olson, M. (1997). *The Basics of S and S-PLUS.* Springer-Verlag, New York.

Lam, Longhow (1999). *An Introduction to S-PLUS for Windows.* CANdiensten, Amsterdam.

Spector, P. (1994). *An Introduction to S and S-PLUS.* Duxbury Press, Belmont, CA.

Data analysis

Bowman, Adrian and Azzalini, Adelchi (1997). *Smoothing Methods.* Oxford University Press.

Bruce, A. and Gao, H.-Y. (1996). *Applied Wavelet Analysis with S-PLUS.* Springer-Verlag, New York.

Chambers, J.M. and Hastie, T.J. (1992). *Statistical Models in S.* Wadsworth & Brooks/Cole, Pacific Grove, CA.

Efron, Bradley and Tibshirani, Robert J. (1994). *An Introduction to the Bootstrap.* Chapman & Hall.

Everitt, B. (1994). *A Handbook of Statistical Analyses Using S-PLUS.* Chapman & Hall, London.

Härdle, W. (1991). *Smoothing Techniques with Implementation in S.* Springer-Verlag, New York.

Hastie, T. and Tibshirani, R. (1990). *Generalized Additive Models.* Chapman & Hall.

Huet, Sylvie, et al. (1997). *Statistical Tools for Nonlinear Regression: with S-PLUS.* Springer-Verlag.

Kaluzny, S.P., Vega, S.C., Cardoso, T.P., and Shelly, A.A. (1997). *S+SpatialStats User's Manual.* Springer-Verlag, New York.

Marazzi, A. (1992). *Algorithms, Routines and S Functions for Robust Statistics.* Wadsworth & Brooks/Cole, Pacific Grove, CA.

Millard, Steven (1998). *User's Manual for Environmental Statistics.* Compansion book to the S+Environmental Stats module. (The S+Environmental Stats module is available through Dr. Millard.)

Selvin, S. (1998). *Modern Applied Biostatistical Methods: Using S-PLUS.* Oxford University Press.

Venables, W.N. and Ripley, B.D. (1999). *Modern Applied Statistics with S-PLUS*, Third Edition. Springer-Verlag, New York.

Graphical techniques

Chambers, J.M., Cleveland, W.S., Kleiner, B., and Tukey, P.A. (1983). *Graphical Techniques for Data Analysis.* Duxbury Press, Belmont, CA.

Cleveland, W.S. (1993). *Visualizing Data.* Hobart Press, Summit, NJ.

Cleveland, W.S. (1994). *The Elements of Graphing Data*, revised edition. Hobart Press, Summit, NJ.

TYPOGRAPHIC CONVENTIONS

Throughout this *User's Guide*, the following typographic conventions are used:

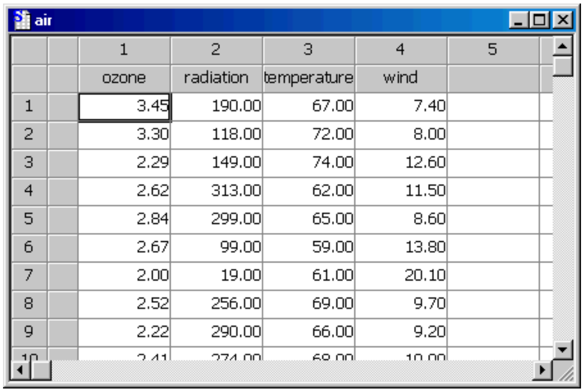
- `This font` is used for S-PLUS expressions and code samples.
- **This font** is used for elements of the Spotfire S+ user interface, for operating system files and commands, and for user input in dialog fields.
- *This font* is used for emphasis and book titles.
- CAP/SMALLCAP letters are used for key names. For example, the Shift key appears as SHIFT.
- When more than one key must be pressed simultaneously, the two key names appear with a hyphen (-) between them. For example, the key combination of SHIFT and F1 appears as SHIFT-F1.
- Menu selections are shown in an abbreviated form using the arrow symbol (▶) to indicate a selection within a menu, as in **File ▶ New**.

WORKING WITH DATA 2

INTRODUCTION

In Spotfire S+, the primary tool for viewing, editing, formatting, and manipulating data is the **Data** window. It is similar to a spreadsheet except that it is column-oriented rather than cell-oriented.

Figure 2.1 below shows the sample data set `air` displayed in a **Data** window.



		1	2	3	4	5
		ozone	radiation	temperature	wind	
1		3.45	190.00	67.00	7.40	
2		3.30	118.00	72.00	8.00	
3		2.29	149.00	74.00	12.60	
4		2.62	313.00	62.00	11.50	
5		2.84	299.00	65.00	8.60	
6		2.67	99.00	59.00	13.80	
7		2.00	19.00	61.00	20.10	
8		2.52	256.00	69.00	9.70	
9		2.22	290.00	66.00	9.20	
10		2.41	274.00	68.00	10.90	

Figure 2.1: *Sample data displayed in a **Data** window.*

Note

Spotfire S+ ships with a number of sample data sets stored in internal databases. These data sets are provided for your convenience while you are familiarizing yourself with Spotfire S+. To see these sample data objects, do the following:

1. Open the **Object Explorer** by clicking the **Object Explorer** button on the **Standard** toolbar.
2. In the left pane of the **Object Explorer**, click the "+" sign to the left of the `SearchPath` object to display the names of the databases in the search path.
3. Click the icon to the left of a database name (for example, **data**) to display all the objects contained in that database in the right pane.

For a complete discussion of the **Object Explorer**, see Chapter 7, Working With Objects and Databases.

You can open any number of **Data** windows simultaneously to display different data sets or to create concurrent views of a single data set.

When you open a **Data** window, the **Data** window toolbar is automatically displayed. The toolbar, shown in Figure 2.2, contains buttons for quickly performing many frequently used editing commands.

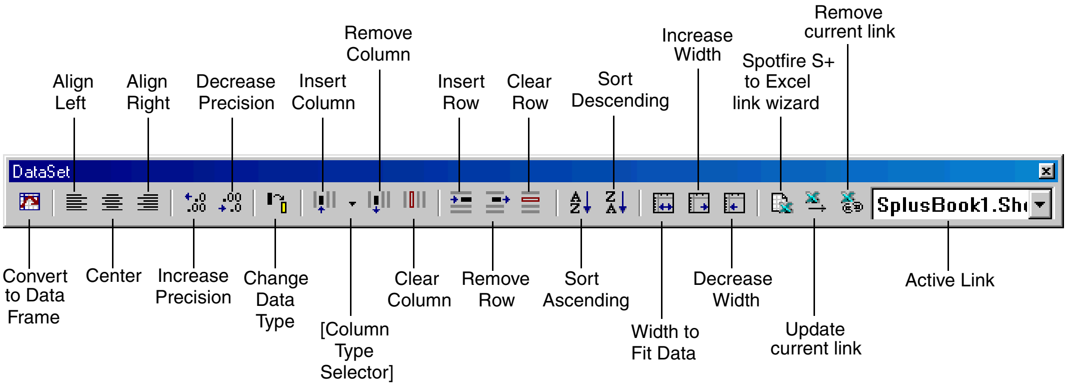


Figure 2.2: *The* ***Data*** *window toolbar.*

Note

For a complete discussion of the Excel section of the **Data** window toolbar, see Using the Spotfire S+ to Excel Link Wizard on page 491.

In the following sections, we introduce the main features of the **Data** window and provide step-by-step procedures for performing the most common editing tasks.

ENTERING, EDITING, AND SAVING DATA

There are a number of methods you can use to get data into Spotfire S+. The easiest way is to import the data from another source, such as Excel, Lotus, or SAS. The **Data** menu also provides a number of options for generating data. For example, the **Transform** option allows you to perform a series of operations on one column in a data set and place the results in another column. The **Commands** window is another powerful tool for generating data. By writing an expression in the S-PLUS programming language, you can, for example, add two columns together and place the results in a third column.

The most fundamental way to get data into Spotfire S+, of course, is to simply type them in from the keyboard, the focus of this section.

Creating a Data Set

To create a new data set, first open a new **Data** window by doing one of the following:

- Click the **New Data Set** button ▦ on the **Standard** toolbar.
- Click the **New** button □ on the **Standard** toolbar or choose **File ▶ New** from the main menu. In the **New** dialog, select **Data Set** and click **OK**.

As shown in Figure 2.3, a new, empty **Data** window opens, named by default `SDF`*x* (where *x* is a sequential number).

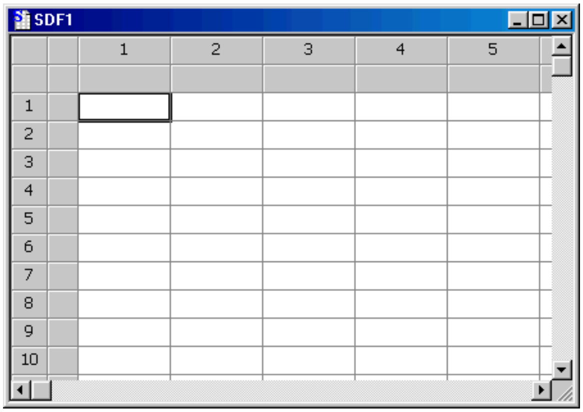
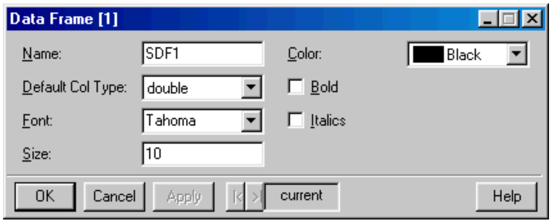


Figure 2.3: *A new, empty* ***Data*** *window.*

To give your new data set a more appropriate name, do the following:

1. Double-click the top shaded cell in the upper left-hand corner of the **Data** window. The **Data Frame** dialog opens, as shown in Figure 2.4.



Data Frame [1]

Name: SDF1

Default Col Type: double

Font: Tahoma

Size: 10

Color: Black

□ Bold

□ Italics

Figure 2.4: *The* ***Data Frame*** *dialog.*

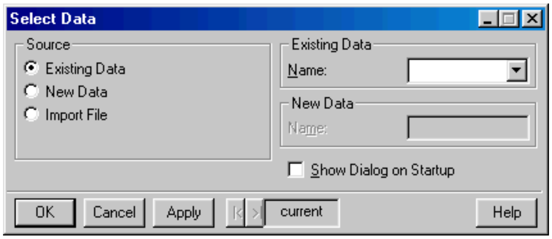
2. Type a new name in the **Name** text box and click **OK**.

Note

Valid data set names may include letters, numbers, and periods but must not start with a number. Extended ASCII characters are not permitted.

You can also create a new data set and rename it at the same time by using the **Data** menu:

1. From the main menu, choose **Data** ▶ **Select Data**. The **Select Data** dialog opens, as shown in Figure 2.5.



Select Data

Source

● Existing Data

○ New Data

○ Import File

Existing Data

Name:

New Data

Name:

□ Show Dialog on Startup

Figure 2.5: *The* ***Select Data*** *dialog.*

2. In the **Source** group, click the **New Data** radio button.
3. In the **New Data** group, type a name for the new data set in the **Name** text box and click **OK**.

Entering and Editing Data

Typing data into a **Data** window is easy–just do the following:

1. Click the cell in which you want to enter a data value.
2. Type the value.
3. Press ENTER or an arrow key to enter the data in the cell.

Pressing ENTER enters the value in the cell and moves the cursor to the next cell; the Spotfire S+ "smart cursor" feature moves the cursor in the direction of the last movement. If you press an arrow key after typing a data value, the cursor moves in the direction of the arrow.

Note

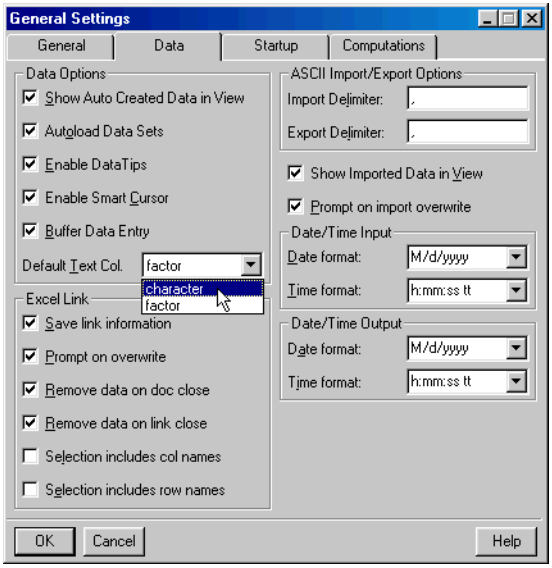
Spotfire S+ requires the columns of a data set to be of equal length and thus pads any shorter columns it encounters with `NA`s.

When you enter data into a new, empty column, Spotfire S+ assigns the column a type that most closely matches the type of data you enter. The default column type for new columns is `double` (for floating-point, double-precision real numbers). If you type character data into an empty column, Spotfire S+ creates a `factor` column (for categorical data).

To change the default column type for character data from `factor` to `character`, do the following:

1. From the main menu, choose **Options ▶ General Settings** to open the **General Settings** dialog.
2. Click the **Data** tab to display the **Data** page of the dialog.

3. In the **Data Options** group, select **character** from the **Default Text Col.** dropdown list and click **OK**.



General Settings

Data Options

☑ Show Auto Created Data in View

☑ Autoload Data Sets

☑ Enable DataTips

☑ Enable Smart Cursor

☑ Buffer Data Entry

Default Text Col. factor

Excel Link

☑ Save link information

☑ Prompt on overwrite

☑ Remove data on doc close

☑ Remove data on link close

☐ Selection includes col names

☐ Selection includes row names

ASCII Import/Export Options

Import Delimiter: ,

Export Delimiter: ,

☑ Show Imported Data in View

☑ Prompt on import overwrite

Date/Time Input

Date format: M/d/yyyy

Time format: h:mm:ss tt

Date/Time Output

Date format: M/d/yyyy

Time format: h:mm:ss tt

Figure 2.6: *Changing the default column type for character data.*

After entering some values in a **Data** window, you may need to edit them. To edit a value in a cell, do the following:

1. Click in the cell containing the value you want to edit.
2. Either press ENTER to go into edit mode or just start typing to overwrite the current data.

To abandon your changes while typing, press ESC.

Undoing Actions

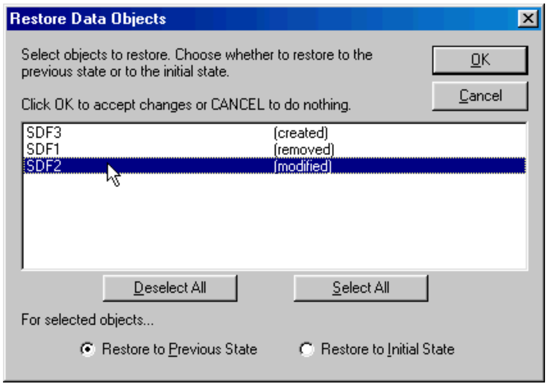
There are two levels of "undo" for the edits you make in a **Data** window. You can either undo your most recent action or restore the data set to its original state at the beginning of the session.

To undo your most recent action, do one of the following:

- Press CTRL-Z or click the **Undo** button on the **Standard** toolbar.
- From the main menu, choose **Edit** ▶ **Undo**.

To restore a data set to its initial state, do the following:

1. Click the **Restore Data Objects** button on the **Standard** toolbar or choose **Edit ▶ Restore Data Objects** from the main menu. The **Restore Data Objects** dialog opens, as shown in Figure 2.7.



Restore Data Objects

Select objects to restore. Choose whether to restore to the previous state or to the initial state.

Click OK to accept changes or CANCEL to do nothing.

SDF3	(created)
SDF1	(removed)
SDF2	(modified)

For selected objects...

● Restore to Previous State ○ Restore to Initial State

Figure 2.7: *The* ***Restore Data Objects*** *dialog.*

2. Select the data set from the list of objects displayed in the dialog.
3. Click the **Restore to Initial State** radio button and then click **OK**.

Note

You can also perform a single undo using the **Restore Data Objects** dialog. Simply select the data set, click the **Restore to Previous State** radio button, and click **OK**.

To redo an undo, just perform one of the above procedures again.

Saving Data

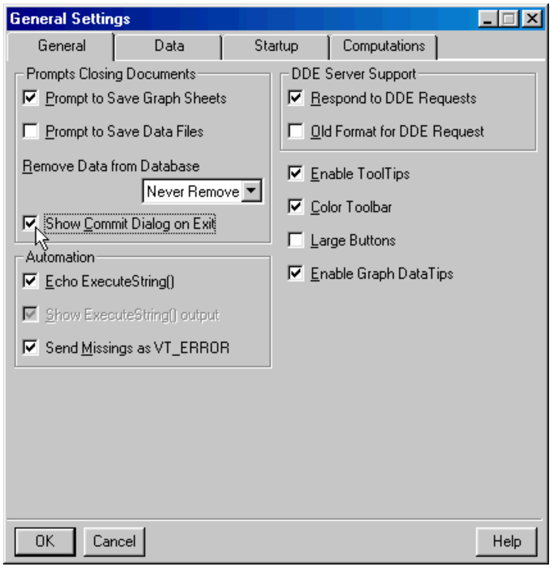
By saving your data in a special internal database, Spotfire S+ safeguards your data with no intervention required on your part. This database, called the *working data*, is the database in which all the data objects you create and modify, as well as all the functions you write in the S-PLUS language, are automatically, and transparently, saved.

You can easily view all the objects stored in your working data by using the **Object Explorer**. For a complete discussion of the working data and how to use the **Object Explorer**, see Chapter 7, Working With Objects and Databases.

If you prefer more control over which new and modified data objects you want Spotfire S+ to save, you can instruct Spotfire S+ to prompt you with a dialog that gives you the opportunity to specify which changes to keep and which to discard. This dialog appears when you end your Spotfire S+ session.

To set this preference, do the following:

1. From the main menu, choose **Options** ▶ **General Settings** to open the **General Settings** dialog.
2. In the **Prompts Closing Documents** group on the **General** page of the dialog, select the **Show Commit Dialog on Exit** check box and click **OK**.



Prompts Closing Documents

☑ Prompt to Save Graph Sheets

□ Prompt to Save Data Files

Remove Data from Database: Never Remove

☑ Show Commit Dialog on Exit

Automation

☑ Echo ExecuteString()

☑ Show ExecuteString() output

☑ Send Missings as VT_ERROR

DDE Server Support

☑ Respond to DDE Requests

□ Old Format for DDE Request

☑ Enable ToolTips

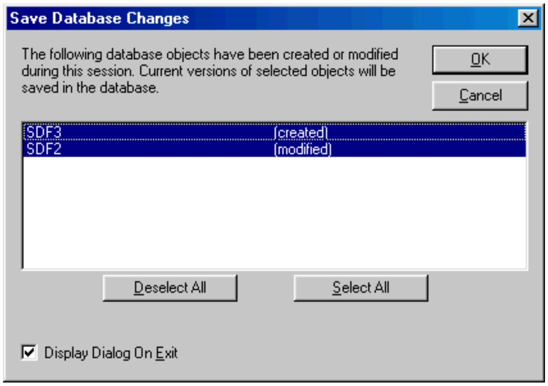
☑ Color Toolbar

□ Large Buttons

☑ Enable Graph DataTips

Figure 2.8: *The* ***General*** *page of the* ***General Settings*** *dialog.*

Setting this preference causes Spotfire S+ to automatically open the **Save Database Changes** dialog, shown in Figure 2.9, whenever you end a session in which you have created or modified any data objects.



Save Database Changes

The following database objects have been created or modified during this session. Current versions of selected objects will be saved in the database.

SDF3 (created)
SDF2 (modified)

☑ Display Dialog On Exit

Figure 2.9: *The **Save Database Changes** dialog.*

By default, all the data objects created or modified during the current session are selected in the **Save Database Changes** dialog. For each data set in the list, do one of the following and then click **OK**:

- To save a new data set or a changed version of an existing data set, leave its name highlighted.
- To discard a new data set or any changes made to an existing data set, CTRL-click its name to deselect it.

Note

After setting this option in the **General Settings** dialog, you can later disable it by clearing the **Display Dialog On Exit** check box in the **Save Database Changes** dialog.

Of course, you can remove a data object from your working data at any time during a session by using the **Object Explorer**. For complete details on using the **Object Explorer**, see Chapter 7.

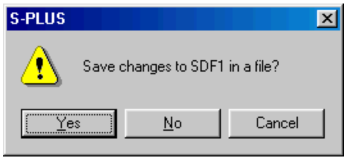
Saving Your Data in External Files

The easiest and most efficient way to save your data sets is to let Spotfire S+ save them for you, as discussed above. Allowing Spotfire S+ to store your data objects in the working data puts all the power of the **Object Explorer** at your disposal.

However, as with other standard Windows products, Spotfire S+ does allow you to save your data sets in external (***.sdd**) files by using the **File** menu. Although we do not recommend this approach, if you prefer to manage your data this way, you will need to reset some option defaults, as follows:

1. Open the **General Settings** dialog to the **General** page, as described above.
2. In the **Prompts Closing Documents** group, do the following:
   - Select the **Prompt to Save Data Files** check box.
   - In the **Remove Data from Database** dropdown list, select **Always Remove Data**.
3. Click **OK**.

Setting these preferences causes Spotfire S+ to prompt you with the following message whenever you close a **Data** window displaying a new or modified data set:



Save changes to SDF1 in a file?

Clicking **Yes** in the dialog opens the **Save Data Set As** dialog. To save your data in a file, simply name the data set, navigate to the desired folder, and click **Save**.

VIEWING AND FORMATTING DATA

As mentioned earlier, Spotfire S+ ships with a large number of sample data sets for your use in exploring Spotfire S+. You can display any of these data sets, as well as any of your own data sets stored in the working data, by using the **Select Data** dialog.

Displaying a Data Set

To display a data set stored in an S-PLUS database, do the following:

1. From the main menu, choose **Data ▶ Select Data**. The **Select Data** dialog opens, as shown in Figure 2.10.

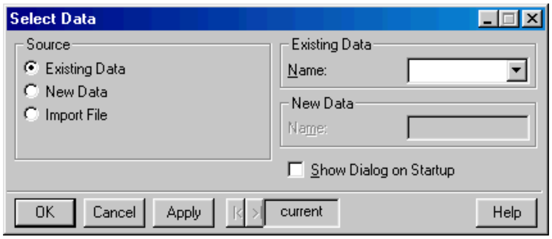


Figure 2.10: *The **Select Data** dialog.*

   In the **Source** group, the **Existing Data** radio button is selected by default.

2. In the **Name** field of the **Existing Data** group, either type the name of the data set you want to open or select its name from the dropdown list and click **OK**.

Hint

You can also display a data set by double-clicking its name in the **Object Explorer**. For a detailed discussion of the **Object Explorer**, see Chapter 7, Working With Objects and Databases.

The data set last opened in a **Data** window (or last selected in the **Object Explorer**) is referred to as the *current* data set. To change the current data set, click in the **Data** window of the data set you want to make current or select it from the list at the bottom of the **Window** menu. When no data set is explicitly referenced in an operation, the current data set is the default.

Opening Concurrent Views of a Data Set

For large data sets, it is often convenient to display several different views of the data in separate **Data** windows.

To open concurrent views of a data set, do the following:

1. Use the **Select Data** dialog to display the data in a **Data** window.
2. From the main menu, choose **Window** ▶ **New Window**.

Note
You can edit your data in the original or any replicated **Data** window. Any changes you make are immediately reflected in all the **Data** windows.

The name of the data set, as it appears in the title bar of the original **Data** window, becomes temporarily appended with **:1**. In the second **Data** window, the name is appended with **:2**. This temporary naming convention continues as additional windows are opened. However, when you close the replicated windows, the original name of the data set is restored.

Navigating a Data Window

Spotfire S+ provides a number of useful keyboard and mouse shortcuts for quickly navigating a **Data** window. These shortcuts are listed in Table 2.1 below.

Table 2.1: *Keyboard and mouse shortcuts for navigating a* ***Data*** *window.*

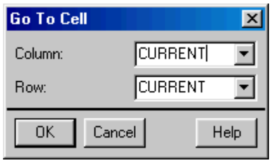
Action	Keyboard	Mouse
Moves the screen left.	CTRL-LEFT ARROW	Click left scroll bar arrow.
Moves the screen right.	CTRL-RIGHT ARROW	Click right scroll bar arrow.
Moves to first column, first row.	CTRL-HOME	Drag sliders to top and left arrows and click the cell.
Moves to last column, last row.	CTRL-END	Drag sliders to bottom and right arrows and click the cell.

Table 2.1: *Keyboard and mouse shortcuts for navigating a* ***Data*** *window. (Continued)*

Action	**Keyboard**	**Mouse**
Moves to first column, same row.	HOME	Drag horizontal slider to left arrow and click the cell.
Moves to last column, same row.	END	Drag horizontal slider to right arrow and click the cell.
Moves to first row, current column.	CTRL-PAGE UP	Drag vertical slider to top arrow and click the cell.
Moves to last row, current column.	CTRL-PAGE DOWN	Drag vertical slider to bottom arrow and click the cell.
Selects a column.	CTRL-SPACEBAR	Click the column header.
Selects a row.	SHIFT-SPACEBAR	Click the row header.
Selects the entire **Data** window.	CTRL-SHIFT-SPACEBAR or CTRL-A	Click the top cell in the upper left-hand corner of the **Data** window.
Puts cursor in selection mode and moves cursor to make block selection.	SHIFT-ARROW KEYS	Click and drag the mouse across cells.
Displays online help.	F1	Click the **Help** button on the **Standard** toolbar and then click in the **Data** window.
Displays the **Go To Cell** dialog.	F5	From the main menu, choose **View** ▶ **Go To Cell**.
Puts cursor in edit mode to edit the column name.	F9	Double-click the name box of the column header.

The **Go To Cell** dialog makes it easy to jump to a specific cell location in a **Data** window.

1. Press F5 or choose **View** ▶ **Go To Cell** from the main menu. The **Go To Cell** dialog opens, as shown in Figure 2.11.



Column: CURRENT

Row: CURRENT

Figure 2.11: *The **Go To Cell** dialog.*

2. Select the column name and enter the row number of the cell you want to jump to. To go to the last column/last row position, type or select the special key word **END** in the **Column** and **Row** fields.
3. Click **OK**.

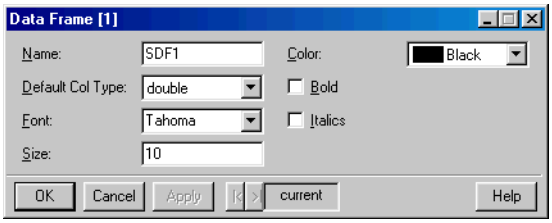
The **Go To Cell** dialog is also useful for extending a cell selection. To extend a selection from the active cell to the location specified in the dialog, simply hold down the Shift key while clicking **OK**. For example, if column 1, row 5 is the active cell and you specify column 5, row 5 in the **Go To Cell** dialog and press Shift-**OK**, the selection is extended from column 1, row 5 to column 5, row 5.

Customizing a Data Window

You can customize a **Data** window to fit your formatting preferences by using the **Data Frame** dialog, as shown in Figure 2.12. To open the dialog, do one of the following:

- Double-click the top shaded cell in the upper left-hand corner of the **Data** window.

- With the **Data** window in focus, choose **Format ▶ Sheet** from the main menu.



Data Frame [1]

Name: SDF1

Default Col Type: double

Font: Tahoma

Size: 10

Color: Black

□ Bold

□ Italics

Figure 2.12: *The* ***Data Frame*** *dialog.*

You can use this dialog to rename your data set, to change the default type for new columns, or to specify the font, font size, and other formatting characteristics of the **Data** window.

Setting Your Preferred Defaults

When you open a new, empty **Data** window, its formatting is based on a set of defaults. For example, the default type for new columns is `double`, a type of numeric data. By using the **Data Frame** dialog, you can change these default settings so that any new **Data** windows you open will reflect your particular formatting preferences.

To set new defaults, first make any desired changes in the **Data Frame** dialog for an open **Data** window and click **OK** to accept the changes. Then do one of the following:

- From the main menu, choose **Options ▶ Save Window Size/Properties as Default**.
- Right-click the top shaded cell in the upper left-hand corner of the **Data** window and select **Save Data Frame as default**.

Selecting Data

In order to format or manipulate data, you must first select the data on which to operate. You can select a single cell, a block of cells, or one or more columns or rows. By first selecting your data in a **Data** window, you can also limit the scope of some menu options.

Selecting Cells and Blocks

To select a single cell, click in the cell you want to select.

To select a block of cells, do one of the following:

- Press and hold down the mouse button in the cell where you want to begin the block selection and then drag the cursor to increase or decrease the size of the highlighted block. When the desired area is highlighted, release the mouse button.
- Click in the cell where you want to begin the block selection and then SHIFT-click in the cell whose column and row positions describe the block you want to select.

Hint

You can extend a cell selection by holding down the SHIFT key while pressing one of the arrow keys.

To select all the cells in a **Data** window, click in the empty, shaded area in the upper left-hand corner of the **Data** window.

Selecting Columns and Rows

To select a single column or row, click in the column or row header.

To select a block of contiguous columns or rows, do one of the following:

- Click in the column or row header of the first column or row to begin the selection and then SHIFT-click in the column or row header of the last column or row describing the block you want to select.
- Press and hold down the mouse button in the column or row header of the first column or row to begin the selection and then drag the cursor across the columns or rows you want to select and release the mouse button.

To select a group of noncontiguous columns or rows, or to select a group of columns or rows in a special order, do the following:

- CTRL-click in the header of each column or row you want to select in the order in which you want to make the selection.

Special note

The key characteristic of CTRL-click selection is that it imposes order on the selection process. By contrast, when dragging the cursor or using SHIFT-click, the order of selection is interpreted by default as left to right for columns or top to bottom for rows, no matter how the action itself is actually performed. Therefore, when using these methods to select data, keep the following points in mind:

- You must use CTRL-click when you need to select noncontiguous columns or rows, but be conscious of the order in which you make your selections.
- You must use CTRL-click when you need to select a group of columns or rows in a specific order even if the columns or rows are contiguous.
- You can drag the cursor or use SHIFT-click to select blocks of contiguous columns or rows as long as a left-to-right or top-to-bottom selection order is what you intend.

Formatting Columns

A column in a data set is a vertical group of cells that typically contains the data for a given variable. Because Spotfire S+ is column-oriented, formatting and data manipulation tools operate on a column as a unit.

Spotfire S+ automatically numbers each column in a data set. The column number is displayed in the column header and indicates the column's position in the **Data** window.

Changing a Column Name

As soon as you enter a data value in an empty column, Spotfire S+ automatically gives the column a default name (`V`*x*, where *x* is a sequential number), which is displayed in the header beneath the column number. You can use the default names to refer to your columns, but it is usually better to replace them with names that are more descriptive.

Tips for naming your columns

- Column names must be unique within a data set.
- Column names must start with a letter and may contain any combination of letters, numbers, and periods. However, column names may not include extended ASCII characters, such as É.

- S-PLUS function names and other reserved words cannot be used as column names.

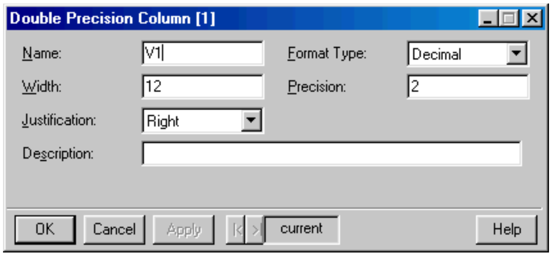
While you can refer to columns by either their names or their numbers, referring to them by name is often easier since some operations cause columns to be renumbered. For example, if you insert a column between columns `5` and `6`, all columns to the right of column `5` are renumbered. If you use numbers to refer to your columns, you must remember to use the new numbers in subsequent operations.

To change a column name in place, do the following:

1. Double-click in the name box of the column header or, with any cell in the column active, press F9.
2. Type a new column name or edit the existing name.
3. Press ENTER or click elsewhere in the **Data** window to accept the changes.

To change a column name by using its properties dialog, do the following:

1. Double-click in the number box of the column header or click in the column and choose **Format ▶ Selected Object** from the main menu. The column properties dialog opens, as shown in Figure 2.13.



Double Precision Column [1]

Name: V1
Format Type: Decimal
Width: 12
Precision: 2
Justification: Right
Description:

Figure 2.13: *The* ***Double Precision Column*** *dialog.*

2. In the **Name** text box, type a new column name or edit the existing name and click **OK**.

Note

The name of a properties dialog, as it appears in the dialog's title bar, is determined by the type of object selected when you open the dialog. For example, the **Double Precision Column** dialog opens for double precision columns, the **Character Column** dialog opens for character columns, etc.

Adding or Editing a Column Description

In addition to numbers and names, columns can also have descriptions. If you specify a description for a column, the description is used as the default axis title and legend text in graphs. If no description is specified, the column name is used instead.

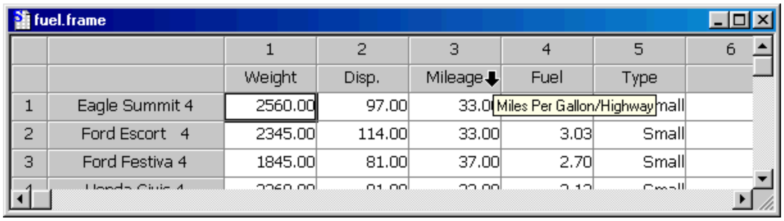
Tips for specifying column descriptions

- Column descriptions can contain up to 75 characters.
- Column descriptions can be any combination of letters, numbers, symbols, and spaces.

To add or edit a column description, do the following:

- Open the column properties dialog as discussed on page 31. In the **Description** text box, type a new column description or edit the existing description and click **OK**.

If you pause your mouse cursor over the name box in the column header, a DataTip displays the column description, as shown in Figure 2.14.



fuel.frame

		1	2	3	4	5	6
		Weight	Disp.	Mileage	Fuel	Type	
1	Eagle Summit 4	2560.00	97.00	33.0 Miles Per Gallon/Highway		mall	
2	Ford Escort 4	2345.00	114.00	33.00	3.03	Small	
3	Ford Festiva 4	1845.00	81.00	37.00	2.70	Small	

Figure 2.14: *A DataTip displays the column description.*

Creating a Column List

A column list is a list of column names or numbers in a dialog field specifying a group or sequence of columns on which to operate. For example, selecting the column names `Weight` and `Type` produces the column list **Weight,Type**.

To create a column list, simply select the column names (using CTRL-click if necessary) from the dialog field's dropdown list.

Note

Dialog fields display only column names, not column numbers.

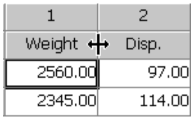
You can also create a column list in a dialog field by typing the column numbers separated by commas. For example, **1,3,4** refers to columns 1, 3, and 4. To specify a sequence of columns, type the beginning and ending column names or numbers separated by a colon. For example, **3:7** refers to columns 3 through 7. To specify all columns in a data set, select the special key word **<ALL>**.

Changing the Column Width

To increase or decrease a column's width by visual inspection, you can either drag the cursor or use a toolbar button.

To change the column width by dragging, do the following:

1. Position the cursor on the vertical line to the right of the column heading. The mouse pointer becomes a resize tool.



1	2
Weight	Disp.
2560.00	97.00
2345.00	114.00

2. Drag the resize tool to the right to increase the width of the column (or to the left to decrease the width).

To change the column width using a toolbar button, do the following:

1. Click in the column.

2. Click the **Increase Width** button or the **Decrease Width** button on the **Data** window toolbar. Each click increases or decreases the column width by one character.

To adjust the column width to fit the widest cell in the column, do the following:

1. Click in the column.

2. Click the **Width to Fit Data** button on the **Data** window toolbar.

If you need to set an exact column width, open the column properties dialog and specify the width you want in terms of the number of characters in the default font and point size.

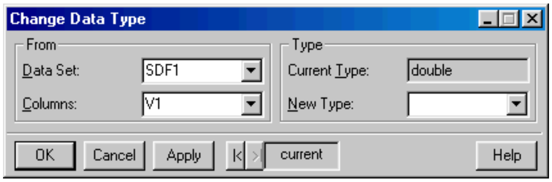
Changing the Data Type

A column's data type determines the type of data you can enter in that column. For example, a column of type `character` accepts only character data, while a column of type `integer` accepts only integer data.

The S-PLUS data types are `character`, `complex`, `double`, `factor`, `integer`, `logical`, `single`, and `timeDate`. The two most commonly used data types are `double` (for floating-point, double-precision real numbers) and `factor` (for categorical data). For a detailed discussion of the S-PLUS data types, see the *Programmer's Guide*.

To change the data type of a column, do the following:

1. Click in the column and then click the **Change Data Type** button on the **Data** window toolbar or choose **Data ▶ Change Data Type** from the main menu. The **Change Data Type** dialog opens, as shown in Figure 2.15.

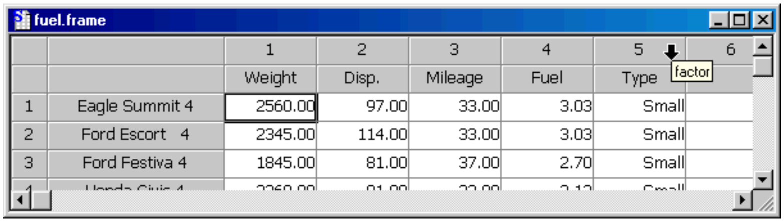


Data Set: SDF1
Columns: V1
Current Type: double
New Type:

Figure 2.15: *The **Change Data Type** dialog.*

2. In the **Type** group, select a new data type from the **New Type** dropdown list and click **OK**.

If you pause your mouse cursor over the number box in the column header, a DataTip displays the column type, as shown in Figure 2.16.



fuel.frame

		1	2	3	4	5	6
		Weight	Disp.	Mileage	Fuel	Type	
1	Eagle Summit 4	2560.00	97.00	33.00	3.03	Small	
2	Ford Escort 4	2345.00	114.00	33.00	3.03	Small	
3	Ford Festiva 4	1845.00	81.00	37.00	2.70	Small	

Figure 2.16: *A DataTip displays the column type.*

Changing the Format Type

Spotfire S+ uses the standard Windows format types for columns containing numeric data: **Mixed**, **Number**, **Decimal**, **Scientific**, **Currency**, **Financial**, **Date**, **Date&Time**, **Time**, and **Elapsed_H:M:S**.

To change the format type of a column, do the following:

- Open the column properties dialog as discussed on page 31. Select a different format type from the **Format Type** dropdown list and click **OK**.

Changing the Display Precision

A column's display precision affects only the way numbers are displayed; it has no effect on internal computations, which always use the maximum precision available.

To change the display precision of a column, do one of the following:

- To increase or decrease the display precision, click in the column and then click the **Increase Precision** button +.0 .00 or the **Decrease Precision** button .00 +.0, respectively, on the **Data** window toolbar.
- Open the column properties dialog as discussed on page 31. In the **Precision** text box, type the desired number of digits to be displayed after the decimal (the maximum number allowed is 17) and click **OK**.

Setting Your Preferred Defaults

You can change your column default settings for justification, precision, width, etc. to reflect your formatting preferences. For example, you might prefer to have a different default width for character columns than for numeric columns.

To set your preferred column defaults, do the following:

1. Open the column properties dialog as discussed on page 31.
2. Make any changes that you want to retain as your new default settings and click **OK**.
3. Right-click in the column and select **Save [Column Type] Column as default** from the shortcut menu.

Formatting Rows

Spotfire S+ automatically numbers each row in a data set. The row number is displayed in the row header and indicates the row's position in the **Data** window. Because Spotfire S+ is column-oriented, most formatting options apply only to columns. You can, however, add names to your rows.

Adding or Changing a Row Name

When used, row names are displayed in the header to the right of the row numbers.

To add or change a row name, do the following:

1. Double-click in the name box of the row header.
2. Type a row name or edit the existing name.
3. Press ENTER or click elsewhere in the **Data** window to accept the changes.

Creating a Row List

A row list is a list of row numbers in a dialog field specifying a group or sequence of rows on which to operate. To create a row list, type the row numbers separated by commas. For example, **1,3,4** refers to rows 1, 3, and 4. To specify a sequence of rows, type the beginning and ending row numbers separated by a colon. For example, **3:7** refers to rows 3 through 7. To specify all rows in a data set, type the special key word **<ALL>**.

MANIPULATING DATA

Spotfire S+ provides a wide assortment of data manipulation tools. Buttons on the **Data** window toolbar are convenient for performing the most common tasks, but many more options are available through the **Data** menu.

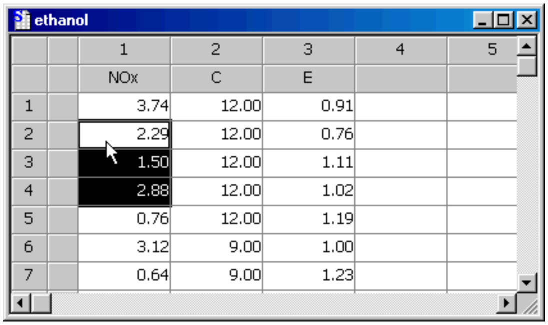
Moving and Copying Data

You can move or copy data within a **Data** window or between different **Data** windows by using a variety of techniques, discussed below.

Moving and Copying Cells and Blocks

To move or copy a cell or block of cells by dragging, do the following:

1. Select the cell or block of cells you want to move or copy.
2. Position the cursor within the selected cell or block. The cursor becomes an arrow, as shown in Figure 2.17.



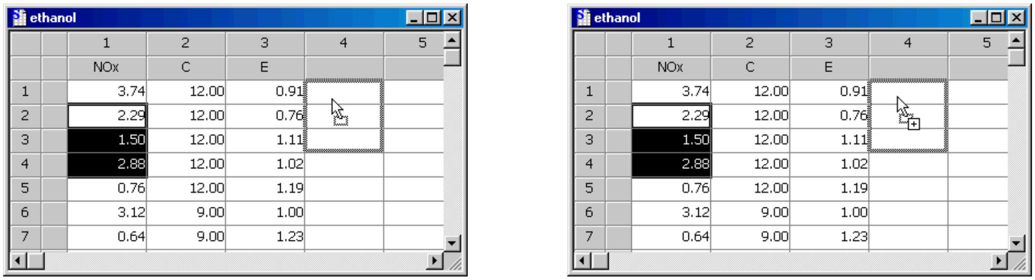
		1	2	3	4	5
		NOx	C	E		
1		3.74	12.00	0.91		
2		2.29	12.00	0.76		
3		1.50	12.00	1.11		
4		2.88	12.00	1.02		
5		0.76	12.00	1.19		
6		3.12	9.00	1.00		
7		0.64	9.00	1.23		

Figure 2.17: *Selecting a block of cells in a* ***Data*** *window.*

3. Drag the selected cell or block to the new location. To move the cell or block, simply release the mouse button. To copy the cell or block, press and hold down the CTRL key while releasing the mouse button. See Figure 2.18.

Note

Moving or copying data to a target location that already contains data overwrites the existing data. Also note that when you move a block of cells, Spotfire S+ fills the empty cells in the old location with `NA`s, which denote missing values.



	1	2	3	4	5
	NOx	C	E		
1	3.74	12.00	0.91		
2	2.29	12.00	0.76		
3	1.50	12.00	1.11		
4	2.88	12.00	1.02		
5	0.76	12.00	1.19		
6	3.12	9.00	1.00		
7	0.64	9.00	1.23		

	1	2	3	4	5
	NOx	C	E		
1	3.74	12.00	0.91		
2	2.29	12.00	0.76		
3	1.50	12.00	1.11		
4	2.88	12.00	1.02		
5	0.76	12.00	1.19		
6	3.12	9.00	1.00		
7	0.64	9.00	1.23		

Figure 2.18: *Moving (above left) and copying (above right) a block of cells in a* ***Data*** *window.*

Hint

When you use drag-and-drop to move or copy data between **Data** windows, be sure to arrange your windows so that you can see both the source and the target cell locations.

To move or copy a cell or block of cells using **Cut**, **Copy**, and **Paste**, do the following:

1. Select the cell or block of cells you want to move or copy.
2. Do one of the following:
   - To move the cell or block, press CTRL-X, or click the **Cut** button on the **Standard** toolbar, or choose **Cut** from the **Edit** or shortcut menu.

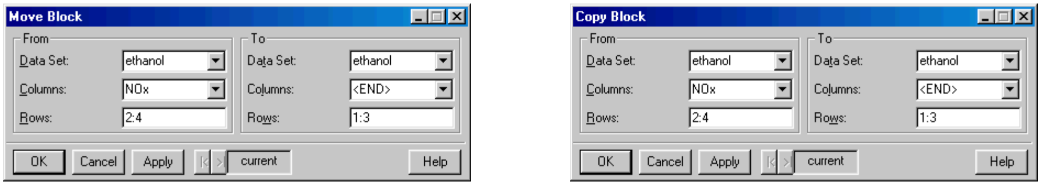
- To copy the cell or block, press CTRL-C, or click the **Copy** button on the **Standard** toolbar, or choose **Copy** from the **Edit** or shortcut menu.

3. Click the mouse in the new location in the **Data** window.

4. Press CTRL-V, or click the **Paste** button on the **Standard** toolbar, or choose **Paste** from the **Edit** or shortcut menu.

To move or copy a cell or block of cells using the **Data** menu, do the following:

1. From the main menu, choose **Data** ▶ **Move** ▶ **Block** to move the cell or block or **Data** ▶ **Copy** ▶ **Block** to copy the cell or block. Depending upon your selection, either the **Move Block** or **Copy Block** dialog opens, as shown in Figure 2.19.



Move Block

From
Data Set: ethanol
Columns: NOx
Rows: 2:4

To
Data Set: ethanol
Columns: <END>
Rows: 1:3

Copy Block

From
Data Set: ethanol
Columns: NOx
Rows: 2:4

To
Data Set: ethanol
Columns: <END>
Rows: 1:3

Figure 2.19: *The* ***Move Block*** *and* ***Copy Block*** *dialogs.*

2. In the **Columns** and **Rows** fields of the **From** group, specify by column and row positions the cell or block of cells you want to move or copy.

3. In the **Columns** and **Rows** fields of the **To** group, specify the target location by column and row positions and click **OK**.

Hint

To move or copy the cell or block to another data set, select its name from the **Data Set** dropdown list of the **To** group. To create a target data set, type a new name in this field.

Moving and Copying Columns and Rows

The procedures for moving and copying columns and rows are the same as those outlined above for moving and copying cells and blocks, with the following additional comments.

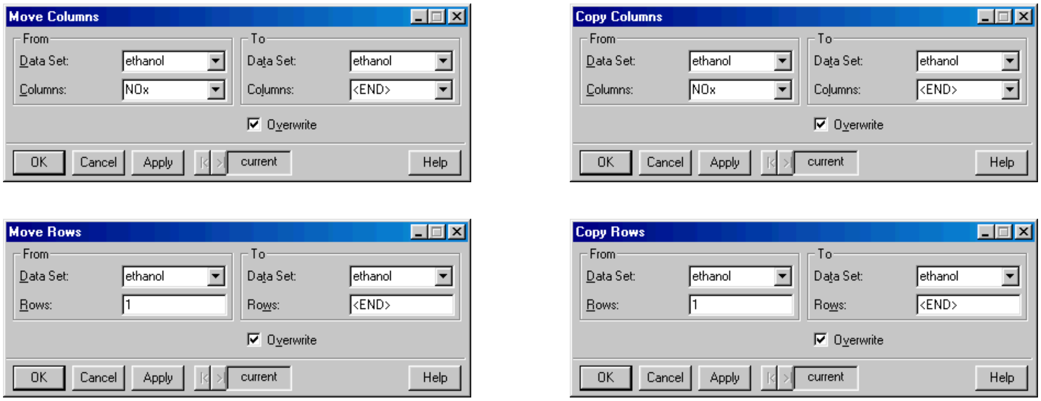
When you move or copy a column or row by dragging, note the following:

- To drag a column or row, position the cursor within the selected column or row, not within the column or row header.
- Spotfire S+ moves or copies the whole column or row as a unit, including the name. Names of copied columns and rows are appended with `.1`.
- Moving or copying data to a target location that already contains data overwrites the existing data.

When you move or copy a column or row using **Cut**, **Copy**, and **Paste**, note the following:

- Spotfire S+ moves or copies only the data values in the column or row to the new location.
- Moving or copying data to a target location that already contains data overwrites the existing data.

As shown in Figure 2.20, the **Data** menu dialogs for moving and copying columns and rows are very similar to those for cells and blocks.



Move Columns

From
Data Set: ethanol
Columns: NOx

To
Data Set: ethanol
Columns: <END>

☑ Overwrite

Copy Columns

From
Data Set: ethanol
Columns: NOx

To
Data Set: ethanol
Columns: <END>

☑ Overwrite

Move Rows

From
Data Set: ethanol
Rows: 1

To
Data Set: ethanol
Rows: <END>

☑ Overwrite

Copy Rows

From
Data Set: ethanol
Rows: 1

To
Data Set: ethanol
Rows: <END>

☑ Overwrite

Figure 2.20: *The **Move Columns**, **Copy Columns**, **Move Rows**, and **Copy Rows** dialogs.*

When you move or copy a column or row using the **Data** menu, note the following:

- Spotfire S+ moves or copies the whole column or row as a unit, including the name. Names of copied columns and rows are appended with `.1`.
- By default, moving or copying data to a target location that already contains data overwrites the existing data. However, you can avoid overwriting your existing data by clearing the **Overwrite** check box at the bottom of the dialogs. When you clear this check box, Spotfire S+ shifts existing columns to the right or existing rows down to make room for the moved or copied data.

Hint

You can copy row names into and out of the shaded row names column in a **Data** window by using the **Copy Columns** dialog–simply select the special key word **<ROWNAMES>** from the **Columns** dropdown list in either the **From** or **To** group.

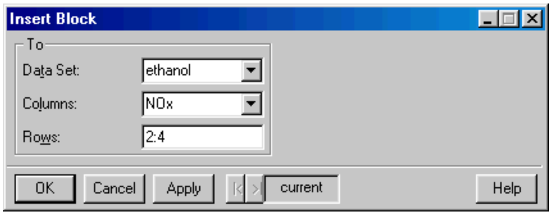
Inserting Data

When you insert a cell, block, column, or row in a **Data** window, Spotfire S+ shifts existing cells down and/or to the right, as appropriate, to make room for the new cells.

Inserting Cells and Blocks

To insert a cell or block of cells, do the following:

- From the main menu, choose **Insert ▶ Block**. The **Insert Block** dialog opens, as shown in Figure 2.21.



Insert Block

Data Set: ethanol

Columns: NOx

Rows: 2:4

Figure 2.21: *The **Insert Block** dialog.*

In the **Columns** and **Rows** fields, specify by column and row positions the cell or block of cells you want to insert and click **OK**.

Inserting Columns

To insert a column, do one of the following:

- Click in the column you want to have shifted to the right to make room for the new column. To insert a new column of the default type, or of the same type as the last new column inserted, click the **Insert Column** button on the **Data** window toolbar. To insert a new column of a specific type, click the column type selector arrow located to the right of the **Insert Column** button (see Figure 2.22) and select the type of column you want to insert.

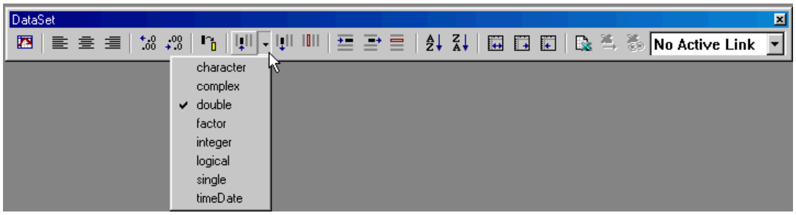
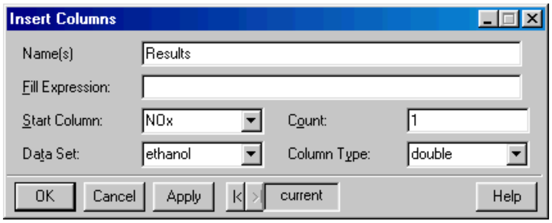


Figure 2.22: *Inserting a column of a specific type.*

- From the main menu, choose **Insert ▶ Column**. The **Insert Columns** dialog opens, as shown in Figure 2.23.



Insert Columns

Name(s): Results

Fill Expression:

Start Column: NOx

Count: 1

Data Set: ethanol

Column Type: double

Figure 2.23: *The* ***Insert Columns*** *dialog.*

Select the column you want to have shifted to the right to make room for the new column from the **Start Column** dropdown list. Type a name for the new column in the **Name(s)** text box and click **OK**.

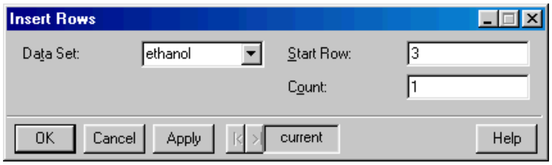
Hint

You can also use the **Insert Columns** dialog to insert multiple columns. Simply type the number of columns you want to insert in the **Count** text box and a comma-delimited list of names in the **Names(s)** text box.

Inserting Rows

To insert a row, do one of the following:

- Click in the row you want to have shifted down to make room for the new row and then click the **Insert Row** button on the **Data** window toolbar.
- From the main menu, choose **Insert ▶ Row**. The **Insert Rows** dialog opens, as shown in Figure 2.24.



Insert Rows

Data Set: ethanol

Start Row: 3

Count: 1

Figure 2.24: *The* ***Insert Rows*** *dialog.*

In the **Start Row** text box, type the row number of the row you want to have shifted down to make room for the new row and click **OK**.

Hint

You can also use the **Insert Rows** dialog to insert multiple rows. Simply type the number of rows you want to insert in the **Count** text box.

Deleting Data

When deleting data in a **Data** window, you can either clear the data values, leaving the cells intact, or you can remove both the cells and their contents and shrink the size of the data set. Note that when you clear data, Spotfire S+ replaces the values in the cells with `NA`s, which denote missing values.

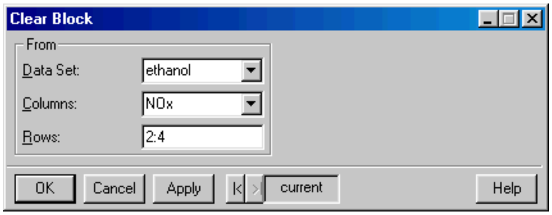
Note

When you clear a cell, block, column, or row by pressing the DELETE key or by choosing **Clear** from the **Edit** or shortcut menu, the data are not placed in the clipboard. To erase the data and place them in the clipboard, choose **Cut** instead.

Clearing and Removing Cells and Blocks

To clear a cell or block of cells, do one of the following:

- Select the cell or block of cells and choose **Clear** from the **Edit** or shortcut menu.
- From the main menu, choose **Data ▶ Clear ▶ Block**. The **Clear Block** dialog opens, as shown in Figure 2.25.



Clear Block

From

Data Set: ethanol

Columns: NOx

Rows: 2:4

Figure 2.25: *The **Clear Block** dialog.*

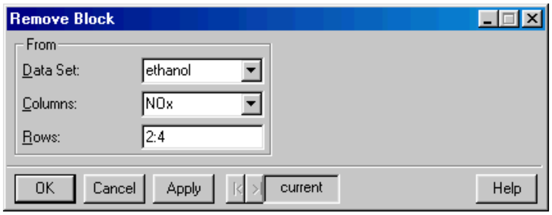
In the **Columns** and **Rows** fields, specify by column and row positions the cell or block of cells you want to clear and click **OK**.

Hint

To clear all the data in a **Data** window, click in the empty, shaded area in the upper left-hand corner of the **Data** window to select all the data in the data set and then choose **Clear** from the **Edit** or shortcut menu.

To remove a cell or block of cells, do one of the following:

- Select the cell or block of cells and then press the DELETE key or choose **Cut** from the **Edit** or shortcut menu.
- From the main menu, choose **Data** ▶ **Remove** ▶ **Block**. The **Remove Block** dialog opens, as shown in Figure 2.26.



Remove Block

From

Data Set: ethanol

Columns: NOx

Rows: 2:4

Figure 2.26: *The* ***Remove Block*** *dialog.*

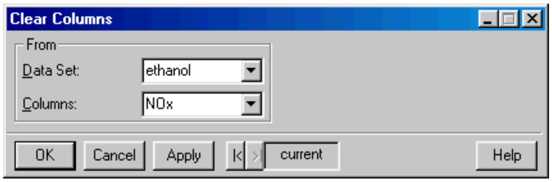
In the **Columns** and **Rows** fields, specify by column and row positions the cell or block of cells you want to remove and click **OK**.

Clearing and Removing Columns

Clearing a column deletes the data in the column but otherwise leaves the column's position, name, and formatting information intact.

To clear a column, do one of the following:

- Click in the column and then click the **Clear Column** button on the **Data** window toolbar.
- Select the column and choose **Clear** from the **Edit** or shortcut menu.
- From the main menu, choose **Data** ▶ **Clear** ▶ **Column**. The **Clear Columns** dialog opens, as shown in Figure 2.27.



Clear Columns

From

Data Set: ethanol

Columns: NOx

Figure 2.27: *The* ***Clear Columns*** *dialog.*

Select the column you want to clear from the **Columns** dropdown list and click **OK**.

Removing a column deletes the entire column and shrinks the size of the data set.

To remove a column, do one of the following:

- Click in the column and then click the **Remove Column** button on the **Data** window toolbar.
- Select the column and then press the DELETE key or choose **Cut** from the **Edit** or shortcut menu.
- From the main menu, choose **Data** ▶ **Remove** ▶ **Column**. The **Remove Columns** dialog opens, as shown in Figure 2.28.

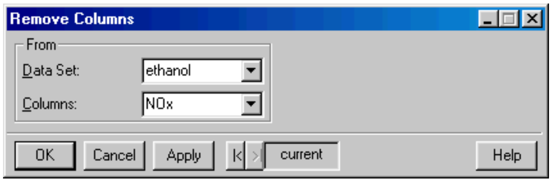


Figure 2.28: *The **Remove Columns** dialog.*

Select the column you want to remove from the **Columns** dropdown list and click **OK**.

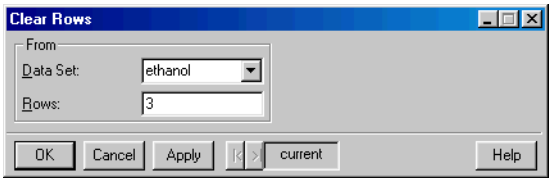
Clearing and Removing Rows

Clearing a row deletes the data in the row but otherwise leaves the row's position and name, if any, intact.

To clear a row, do one of the following:

- Click in the row and then click the **Clear Row** button on the **Data** window toolbar.
- Select the row and choose **Clear** from the **Edit** or shortcut menu.

- From the main menu, choose **Data ▶ Clear ▶ Row**. The **Clear Rows** dialog opens, as shown in Figure 2.29.



Data Set: ethanol

Rows: 3

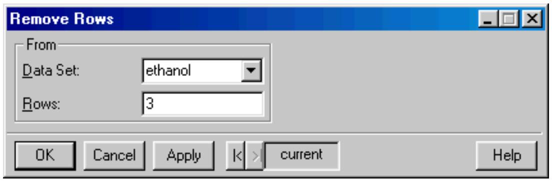
Figure 2.29: *The* ***Clear Rows*** *dialog.*

Type the row number of the row you want to clear in the **Rows** text box and click **OK**.

Removing a row deletes the entire row and shrinks the size of the data set.

To remove a row, do one of the following:

- Click in the row and then click the **Remove Row** button on the **Data** window toolbar.
- Select the row and then press the DELETE key or choose **Cut** from the **Edit** or shortcut menu.
- From the main menu, choose **Data ▶ Remove ▶ Row**. The **Remove Rows** dialog opens, as shown in Figure 2.30.



Data Set: ethanol

Rows: 3

Figure 2.30: *The* ***Remove Rows*** *dialog.*

Type the row number of the row you want to remove in the **Rows** text box and click **OK**.

Sorting Data

Spotfire S+ provides toolbar buttons for performing quick sorts on whole data sets, as well as a dialog that allows you to customize your sorting parameters.

Quick Sorts

To quickly sort all the columns of a data set in place by the column containing the active cell, do the following:

- Click in the column you want to sort by and then click the **Sort Ascending** button AZ↓ or the **Sort Descending** button ZA↓, as appropriate, on the **Data** window toolbar.

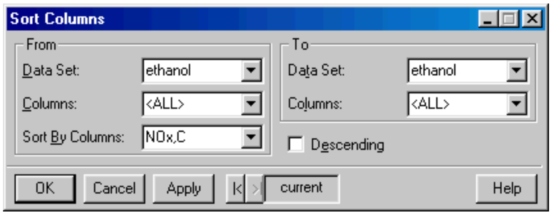
Customized Sorts

For greater control in specifying your sorting parameters, use the **Sort Columns** dialog available through the **Data** menu. The dialog allows you to:

- Specify whether to sort the entire data set or a subset of its columns.
- Select more than one column to sort by. When specifying multiple columns to sort by, the data are first ranked according to the first column selected. Then, in the case of equivalent data, the column next selected determines the ranking, and so on.
- Specify a different data set or column(s) in which to store the sort results if you want to avoid overwriting your original data.

To perform a customized sort, do the following:

1. From the main menu, choose **Data** ► **Restructure** ► **Sort**. The **Sort Columns** dialog opens, as shown in Figure 2.31.



Sort Columns

From

Data Set: ethanol

Columns: <ALL>

Sort By Columns: NOx,C

To

Data Set: ethanol

Columns: <ALL>

□ Descending

Figure 2.31: *The **Sort Columns** dialog.*

2. In the **From** group, select the columns you want to sort from the **Columns** dropdown list. To sort all the columns in the data set, select the special key word **<ALL>**.

3. Select one or more columns to sort by from the **Sort By Columns** dropdown list. To sort by more than one column, CTRL-click to select the columns in the desired ranking order.
4. In the **To** group, specify a target destination for the sort results:
    - To sort in place, select the same data set and columns from the **Data Set** and **Columns** dropdown lists, respectively, as you selected in the corresponding **From** group fields.

Caution

Mismatched columns may result when sorting in place with fewer than **<ALL>** columns selected in the **Columns** fields.

- To send the sort results to a different data set, select a data set from the **Data Set** dropdown list (or type a new name in this field to create a data set) and select the desired columns from the **Columns** dropdown list.

Note

The number of columns selected in the **To** group must match the number of columns selected in the **From** group. Note also that existing data in target columns will be overwritten.

5. By default, columns are sorted in ascending order. To sort in descending order, select the **Descending** check box.
6. Click **OK**.

Other Data Manipulation Options

In addition to the basic tools discussed so far, the **Data** menu provides many more useful data manipulation options. What follows is a brief description of those not already covered. Chapter 6 gives examples using the **Random Numbers**, **Distribution Functions**, **Tabulate**, and **Random Sample** tools. For details on using all the data manipulation dialogs, see the online help.

Transpose

The **Transpose Columns** and **Transpose Rows** dialogs allow you to convert columns to rows and vice versa. Use the **Transpose Block** dialog to transpose a block of text (that is, turn the block on its side).

Exchange

The **Exchange Columns** and **Exchange Rows** dialogs let you trade the positions of columns or rows between different data sets.

Restructure

Append

The **Append Columns** dialog can be used to append a column of data to the end of another column.

Pack

The **Pack Columns** dialog allows you to delete missing values in a column and shift the remaining values up to close the space.

Stack

The **Stack Columns** dialog lets you stack separate columns of data into a single column, with the values in the other columns replicated as necessary.

Unstack

The **Unstack Columns** dialog can be used to break up a single column into several columns of specified lengths.

Fill

The **Fill Numeric Columns** dialog allows you to fill columns in a data set with `NA`s or with a series of generated numbers.

Recode

The **Recode** dialog lets you recode all occurrences of a specific value in specified columns to a new value.

Transform

The **Transform** dialog can be used to create a new variable based on a transformation of other variables.

Create Categories

The **Create Categories** dialog allows you to create new categorical variables from numeric (continuous) variables or to redefine existing categorical variables by renaming or combining groups.

Random Numbers

The **Random Numbers** dialog lets you generate random numbers from a specified distribution.

Distribution Functions

The **Distribution Functions** dialog can be used to compute density values, cumulative probabilities, and quantiles from a specified distribution.

Split

The **Split Data by Group** dialog allows you to split a data set into multiple new data sets based on the values of a splitting variable.

Subset

The **Subset** dialog lets you create a subset of a data set based on a subsetting expression. While the dialog provides tools for helping you write this expression, some knowledge of S-PLUS language syntax is required.

Merge

The **Merge Two Data Sets** dialog can be used to combine data from two data sets into a single data set.

Tabulate

The **Tabulate** dialog allows you to create a tabular summary of data from a data set. Selected columns of the data set are identified as variables, and the count of each combination of variable values is returned. Numeric variables can be binned before the counting occurs.

The table of the counts can be printed and also returned in a data set suitable for multipanel conditioning plots. For statistics and other summary information, choose **Statistics ► Data Summaries ► Crosstabulations**.

Expand Grid

The **Expand Grid** dialog lets you create a new data set containing all combinations of sets of values in an existing data set. Each set of values may be either all unique values in a column or a specified number of equispaced values covering the range of values in a column. This dialog is useful for producing columns representing a grid of values over which to evaluate a function or obtain predictions from a model.

Random Sample

The **Random Sample of Rows** dialog can be used to generate random samples or permute the observations in a data set.

LIBRARIES INCLUDED WITH SPOTFIRE S+

All data sets in Spotfire S+ are stored in libraries. When we speak of "S-PLUS," however, we usually mean the executable program and the objects in the libraries that are attached automatically at startup. The Spotfire S+ distribution contains additional libraries. To see a list and a description of each, at the command prompt, type

```
library()
```

Your default text editor opens and displays the information.

You can attach a library from the main menu by clicking **File ▶ Load Library**, or by using the `library()` function from the **Commands** window (see Chapter 8). Many of these libraries, including the `robust` library and the libraries contributed by Frank Harrell and Brian Ripley, include graphical user interfaces. Others, such as the `examples` and `example5` directories, contain simple command-line functions.

Note

In addition to loading libraries from the menu or from the **Commands** window, you can find and download packages. From the main menu, click **File ▶ Find Packages**, select the repository (URL or local file path), and then from the list, select the package to download. You can also get the latest versions of packages you have downloaded using the **File ▶ Update Packages** menu command. See the *Guide to Packages* for more information about using packages.

As an example of what you can do with these libraries, attach the `maps` library and try a few of its commands in the **Commands** window:

```
> library(maps)
> map("county", "Washington") # Create a map of Washington
> map() # Create a map of the USA with state boundaries
> graphsheet()
> usa() # Create a different map of the USA--compare
```

(The USA map created by `map` is superior to that created by `usa`.)

EXPLORING DATA

3

INTRODUCTION

In this chapter, we discuss the concept of exploratory data analysis and introduce you to a variety of plot types for examining the structure of your data. Our discussion here is devoted exclusively to the use of plotting techniques as a means of examining your data. However, Spotfire S+ also offers a wide assortment of options for fully customizing your plots and transforming them into presentation-quality graphics. These procedures are documented in the *Guide to Graphics*, available from the **Help ► Online Manuals** menu in Windows, or as graphics.pdf in your **SHOME\help** directory.

VISUALIZING ONE-DIMENSIONAL DATA

A one-dimensional data object is sometimes referred to as a (single) data sample, a set of univariate observations, or simply a batch of data. In this section, we examine a number of basic plot types useful for exploring the shape of the distribution of a one-dimensional data object.

These visualization plots are simple but powerful exploratory data analysis tools that can help you quickly grasp the nature of the distribution of your data. Such an understanding can help you avoid the misuse of statistical inference methods, such as using a method appropriate only for a normal (Gaussian) distribution when the distribution is strongly non-normal.

The Michelson Data

The first step in creating a plot is creating or locating the data of interest. For large data sets, you may prefer to store the data in a database or a spreadsheet, such as Microsoft Excel. For smaller data sets, it is convenient to directly enter the data into a **Data** window. We begin this section by creating an example data set, the Michelson data (`exmichel`).

In 1876, the French physicist Cornu reported a value of 299,990 km/sec for *c*, the speed of light. In 1879, the American physicist A.A. Michelson carried out several experiments to verify and improve on Cornu's value.

Michelson obtained the following 20 measurements of the speed of light:

```
 850  740  900  1070  930  850  950  980  980  880
1000  980  930   650  760  810 1000 1000  960  960
```

To obtain Michelson's actual measurements in km/sec, add 299,000 km/sec to each of the above values.

The 20 observations can be thought of as observed values of 20 random variables with a common but unknown mean-value location μ. If the experimental setup for measuring the speed of light is free of bias, then it is reasonable to assume that μ is the true speed of light.

In this and subsequent sections, we examine the distribution of these observations. In Chapter 6, Statistics, we pose some questions regarding the mean of the data and perform various statistical tests to answer the questions.

The data form a single, ordered set of observations, so they are appropriately described as a data set with one variable. We will use a **Data** window to create a new data set containing the 20 observations listed above.

1. From the main menu, choose **Data ▶ Select Data** to display the **Select Data** dialog.
2. In the **Source** group, click the **New Data** radio button to select it.
3. In the **New Data** group, type **exmichel** in the **Name** field and click **OK**.
4. Now enter the 20 data points in the first column.
5. Change the column (or variable) name from the default `V1` by double-clicking `V1` and typing **speed**. Press ENTER or click elsewhere in the **Data** window to accept the change.

Exploratory Plots

To obtain a useful exploratory view of the Michelson data, create the following plots: a box plot, a histogram/density plot, and a QQ normal plot.

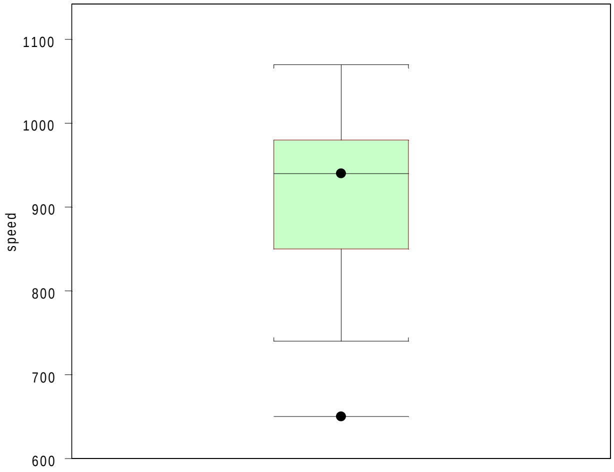


Figure 3.1: *A box plot of the Michelson data.*

The box plot indicates that the median has a value of about 950 and that the distribution is probably a bit skewed toward the smaller values. It also indicates a possible outlier with a value of about 650.

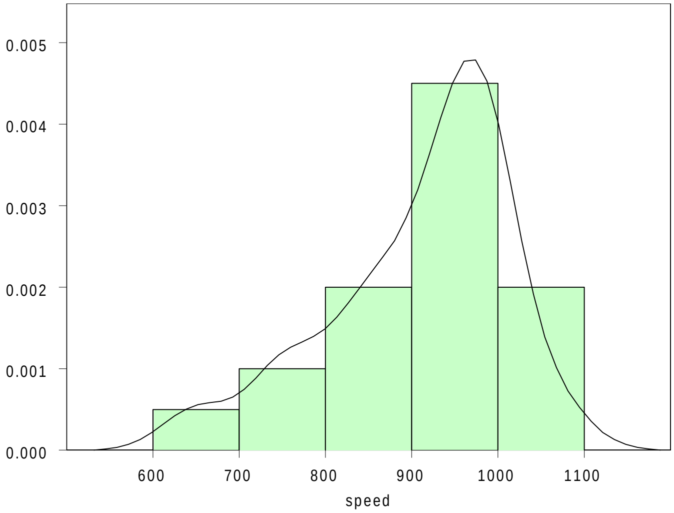


Figure 3.2: *Density estimate with histogram of the Michelson data.*

The data points in the QQ normal plot, shown in Figure 3.3, do not fall particularly close to the straight line provided in the plot, which suggests that the data may not be normally distributed.

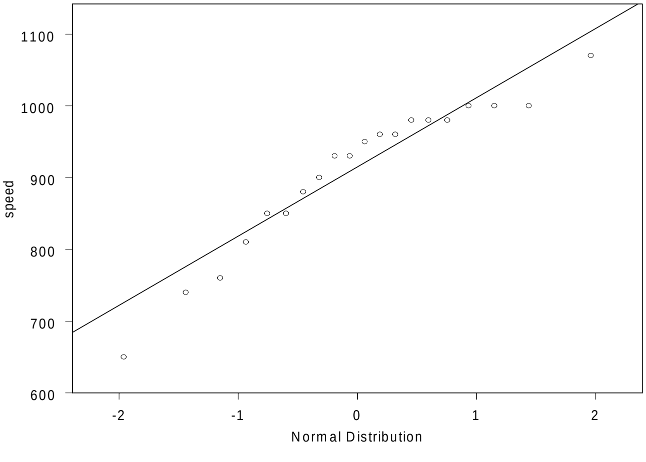
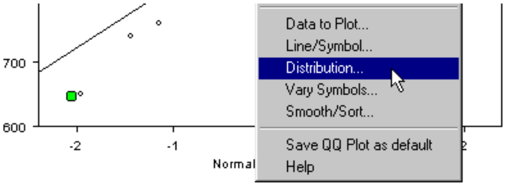


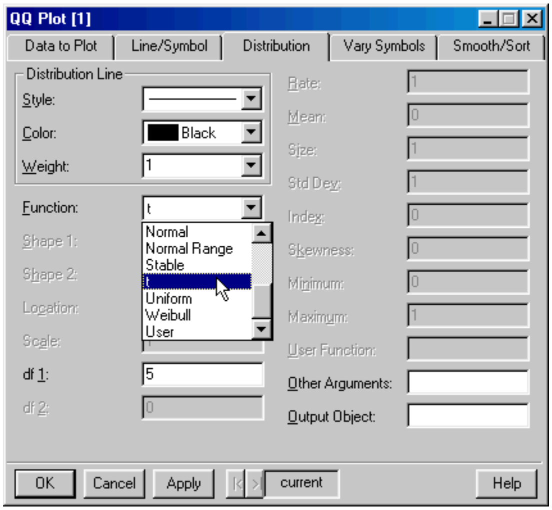
Figure 3.3: *QQ normal plot with reference line for the Michelson data.*

Exploring QQ plots for other distributions

1. Try making QQ plots for other distributions. Right-click any data point to display the shortcut menu. From the shortcut menu, select **Distribution** to display the **QQ Plot** dialog opened at the **Distribution** page.



2. Select **t** in the **Function** combo box, type **5** in the **df 1** (degrees of freedom) box, and click **OK**.



Style: ———
Color: Black
Weight: 1
Function: t
Shape 1:
Shape 2:
Location:
Scale:
df 1: 5
df 2: 0
Rate: 1
Mean: 0
Size: 1
Std Dev: 1
Index: 0
Skewness: 0
Minimum: 0
Maximum: 1
User Function:
Other Arguments:
Output Object:

Figure 3.4: *The* ***Distribution*** *page of the* ***QQ Plot*** *dialog.*

Does your t-distribution QQ plot look any more linear? Try QQ plots for some other distributions, such as **Uniform**.

Keep in mind that the sample size is very small, and you may wonder about the intrinsic variability of a normal QQ plot from sample to sample. A useful exercise is to simulate samples of normal random numbers with each sample having the same length as your data (20 in the case of `exmichel`), compute a QQ plot for each simulated normal random vector, and observe the variability in the QQ plots. Simulating random numbers is described in Chapter 6.

VISUALIZING TWO-DIMENSIONAL DATA

In the previous section, you learned how to make several types of plots that provide quick, visual insight into the shape of the distribution of one-dimensional data. In this section, you expand your toolkit of visual exploratory data analysis tools by learning how to make scatter plots, line plots, and some other types of plots of two-dimensional data (2D plots).

Two-dimensional data are often called bivariate data, and the individual, one-dimensional components of the data are often referred to as variables. Two-dimensional plots help you quickly grasp the nature of the relationship between the two variables that constitute bivariate data. For example, is the relationship linear or nonlinear? Are the variables highly correlated? Are there any outliers? Are there any distinct clusters? When you couple 2D plot visualization of your bivariate data with one-dimensional visualizations of the distribution of each of the two variables (for example, using box plots or histograms), you gain a thorough understanding of your data.

The Main Gain Data

The "main gain" data in Table 3.1 present the relationship between the number of housing starts and the number of new main telephone extensions. The first column, "New Housing Starts," is the change in new housing starts from one year to the next in a geographic area around New York City, in "sanitized" units (for confidentiality). The second column, "Gain in Main Residential Telephone Extensions," is the increase in main residential telephone extensions in the same geographic area, again in sanitized units. In this section, we explore the relationship between these two variables.

Table 3.1: *Main gain data.*

New Housing Starts	Gain in Main Residential Telephone Extensions
0.06	1.135
0.13	1.075

Table 3.1: *Main gain data. (Continued)*

New Housing Starts	Gain in Main Residential Telephone Extensions
0.14	1.496
-0.07	1.611
-0.05	1.654
-0.31	1.573
0.12	1.689
0.23	1.850
-0.05	1.587
-0.03	1.493
0.62	2.049
0.29	1.942
-0.32	1.482
-0.71	1.382

The data are best represented as a data set with two variables:

1. Click the **New Data Set** button ▦ on the **Standard** toolbar.
2. Enter the 14 observations listed above. Change the column (variable) names from the default `V1` and `V2` to `diff.hstart` and `tel.gain`, respectively (double-click `V1` and `V2` to change the variable names).
3. Rename the data set by double-clicking the top shaded cell in the upper left-hand corner of the **Data** window, typing **exmain** in the **Name** field, and clicking **OK**.

Scatter Plots

If you are responsible for planning how many new residence extensions you need to install next year, and you can get an estimate of new housing starts for next year, then you will naturally be interested in whether or not there is a strong relationship between `diff.hstart` (the increase in new housing starts each year) and `tel.gain` (the increase in residence telephone extensions each year), that is, whether or not you can use `diff.hstart` to predict `tel.gain`. As a first step in assessing whether or not there appears to be a strong relationship between these two variables, we make a scatter plot, as shown in Figure 3.5.

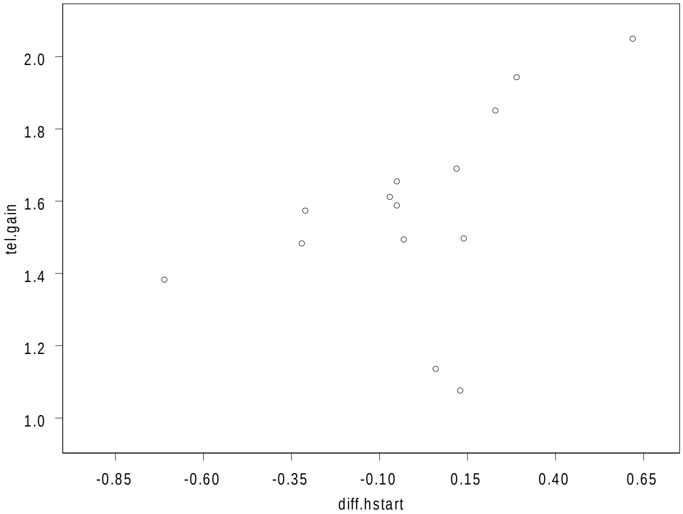
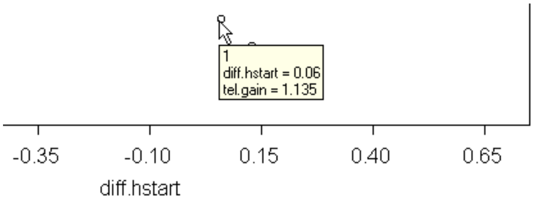


Figure 3.5: *Scatter plot of* `tel.gain` *versus* `diff.hstart`.

The plot immediately reveals two important features in the data: With the exception of two of the data points, there is a positive and roughly linear relationship between new housing starts and the increase in residential telephone extensions. The two exceptional data points are well detached from the remainder of the data; such data points are called outliers.

Identifying Outliers

Move the mouse pointer over one of the outlying points. A DataTip appears showing the values of the two variables at that point, as shown in Figure 3.6.



1
diff.hstart = 0.06
tel.gain = 1.135

Figure 3.6: *DataTip showing variable values at pointer location.*

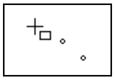
Notice the number that appears on the first line of the DataTip. This number identifies the row number of the data set corresponding to the point. In Figure 3.6, the DataTip identifies this point as Row 1. Now move the mouse pointer over the second outlying point. The DataTip for this point identifies it as Row 2. Thus, the first two observations in the data set are the outliers.

Selecting and Highlighting Points

You can highlight data points in a scatter plot with a color that distinguishes them from the remainder of the data. Let's highlight the two outliers in the scatter plot for the `exmain` data.

1. Open the **Graph Tools** palette by clicking the **Graph Tools** button on the **Graph** toolbar.

2. Click the **Select Data Points** button on the **Graph Tools** palette. The mouse cursor becomes a cross-hair with a little rectangle annotation.



3. Drag a rectangle around the two outliers to select them. They now appear highlighted, in red by default. (You can highlight additional points by pressing the CTRL key while releasing the mouse button.)

Note

When you select points in a scatter plot, they are also selected in any **Data** window in which the data are displayed.

4. Change the cross-hair mouse pointer back to the regular mouse pointer by clicking the **Select Tool** button ↖ on the **Graph Tools** palette.
5. Close the **Graph Tools** palette when you are done. Click a cell in the **Data** window to deselect all points.

Scatter Plots With Line and Curve Fits

You can fit a straight line to your scatter plot data and superimpose the fit with the data. Such a fit helps you visually assess how well the data conform to a linear relationship between two variables. When the linear fit seems adequate, the fitted straight line plot provides a good visual indication of both the slope of bivariate data and the variation of the data about the straight line fit.

Least Squares Straight Line Fits

You can fit a straight line to the `exmain` bivariate data by the method of least squares and display the result superimposed on a scatter plot of the data. Proceed as above when making a scatter plot except this time click the **Linear Fit** button on the **Plots 2D** palette rather than the **Scatter** button. The result is shown in Figure 3.7 below.

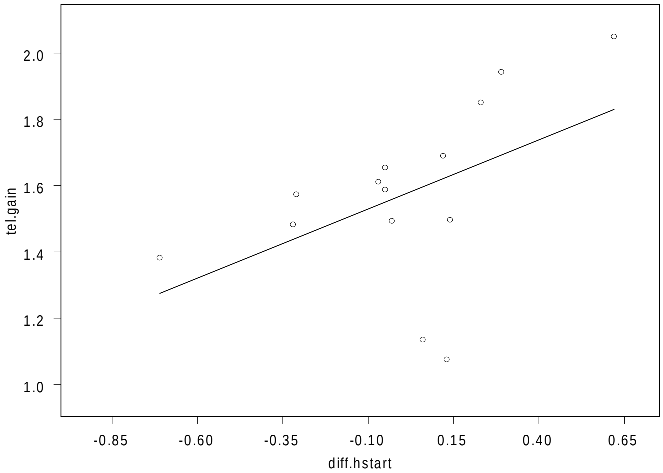


Figure 3.7: *Scatter plot with least squares line of* `tel.gain` *versus* `diff.hstart`.

Notice in the graph that the two outliers in the data appear to influence the least squares line fit by pulling the line downward and reducing its slope relative to the remainder of the data.

Robust Line Fits

The least squares fit of a straight line is not robust in that outliers can have a large influence on the location of the line. A robust method is one that is not influenced very much by outliers, no matter how large. To fit a robust line by a method called least trimmed squares (LTS) and display the result, select the data and click the **Robust LTS** button on the **Plots 2D** palette. The result is shown in Figure 3.8 below. Save your **Graph Sheet** as `exmain.sgr`.

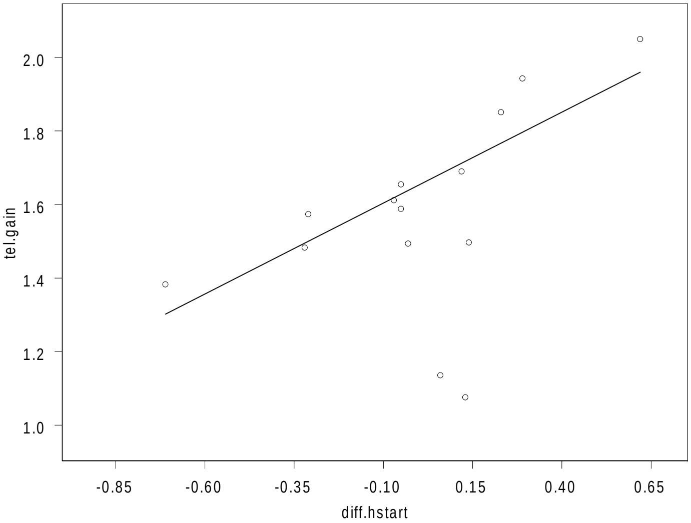


Figure 3.8: *Scatter plot of* `tel.gain` *versus* `diff.hstart` *with robust LTS line.*

Compare Figure 3.7 to Figure 3.8 and note how much the two outliers influenced the least squares line.

Line fits with selected points deleted

Since the least squares line for the `exmain` data appears to be influenced by the two outliers, it would be nice to see what the effect is of making the least squares fit with these two points removed. This is very easy to do:

1. Make a scatter plot with a least squares line of `tel.gain` versus `diff.hstart` and select the two outliers as you did before (see Figure 3.9). Remember to change the cursor back

to its regular form by clicking on the **Select Tool** button on the **Graph Tools** palette after you have selected the outlier data points.

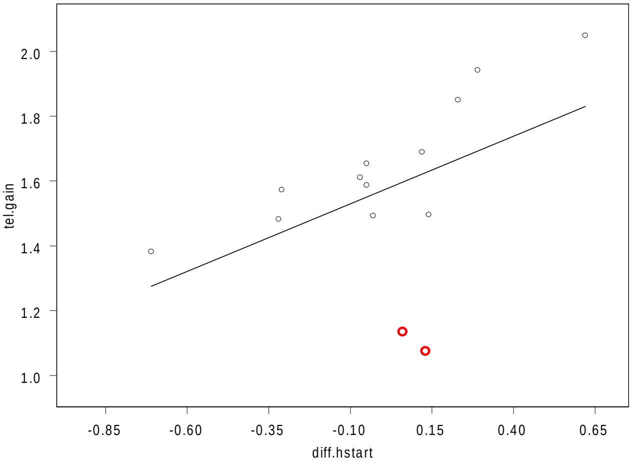


Figure 3.9: *Scatter plot with least squares line, outlier points selected.*

2. From the main menu, choose **Format ▶ Exclude Selected Points**. This results in a new least squares line, which fits the data without outliers quite well, as shown in Figure 3.10. Notice that the vertical axis scale has changed and the two removed outliers do not appear in the plot.

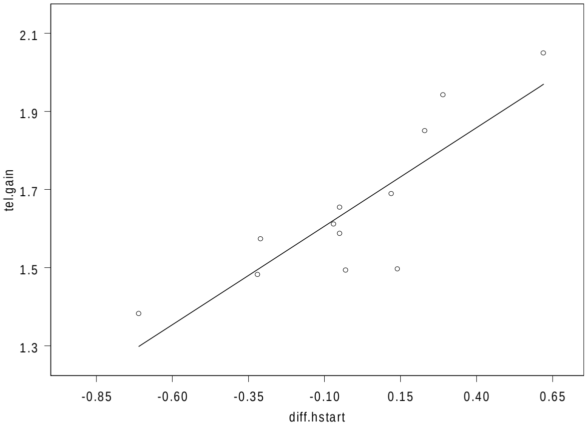


Figure 3.10: *Scatter plot with least squares line, outlier points removed.*

A hallmark of a good robust line fitting method is that it gives a straight line fit that is close to that obtained with least squares when the data do not contain outliers. You can check this out for the least trimmed squares (LTS) robust line fit relative to least squares by adding the LTS robust line to the graph you just made.

3. With the columns to plot selected, select the graph region, press the SHIFT key, and click the **Robust LTS** button on the **Plots 2D** palette. The resulting graph, shown in Figure 3.11, reveals that the LS fit with outliers removed and the LTS fit with outliers included are indeed rather close to one another. Notice that the scatter plot now displays the original axis ranges and that the two outliers removed from the LS fit are displayed with the robust LTS line.

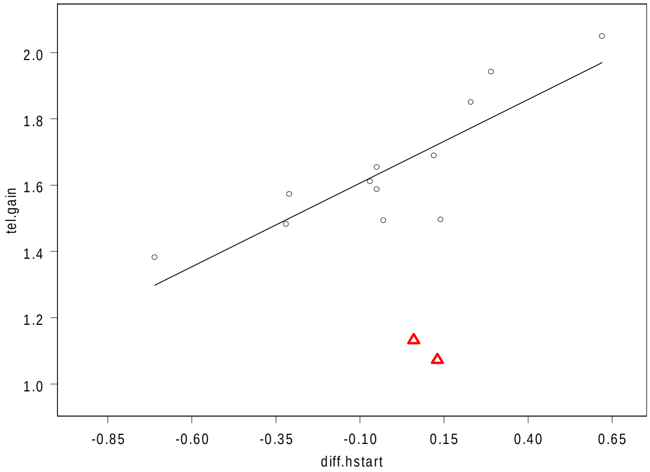


Figure 3.11: *Scatter plot with least squares fit (no outliers) and robust LTS lines.*

4. Now that you have the LS fit for the data with the two outliers excluded, you can easily add the points back in and see how the line fits change. Just choose **Format ▶ Include All Points**

from the main menu, and you get the graph shown in Figure 3.12. All existing plots on the graph will be recalculated to include all points.

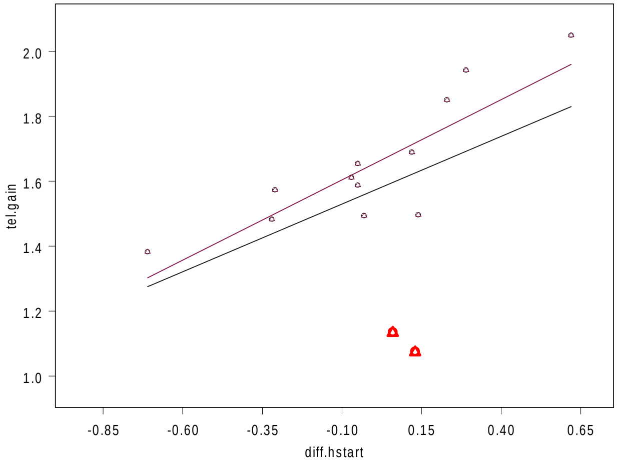


Figure 3.12: *Scatter plot with least squares and robust LTS lines, outlier points included.*

Scatter Plots With Nonparametric Curve Fits

In the previous section, we fit linear parametric functions to the scatter plot data. Frequently, you do not have enough prior information to determine what kind of parametric function to use. In such cases, you can fit a nonparametric curve, which does not assume a particular type of nonlinear relationship.

Nonparametric curve fits are also called smoothers since they attempt to create a smooth curve showing the general trend in the data. The simplest smoothers use a running average, where the fit at a particular x value is calculated as a weighted average of the y values for nearby points, with the weighting given to each point decreasing as the distance between its x value and the x value of interest increases. In the simplest type of running average smoother, all points within a certain distance (or window) from the point of interest are used in the average for that point.

The window width is called the bandwidth of the smoother. Making the bandwidth wider results in a smoother curve fit but may miss rapidly changing features. Making the bandwidth narrower allows the smoother to track rapidly changing features more accurately but results in a rougher curve fit.

More sophisticated smoothers add variations on this approach, such as using smoothly decreasing weights or local linear fits. However, all smoothers have some type of smoothness parameter (bandwidth) controlling the smoothness of the curve.

The issue of good bandwidth selection is complicated and has been treated in many statistical research papers. You can, however, get a feeling for the practical consequences of varying the bandwidth by actually using some smoothers on real data.

This section describes how to use three different types of smoothers–kernel smoothers, spline smoothers, and loess smoothers–and select their bandwidths to control the degree of smoothness of your curve fit (or "smooths" of the data).

We will use the sample data set `sensors`, which contains the responses of eight different semiconductor element sensors to varying levels of nitrous oxide (NOx) in a container of air. The engineers who design these sensors study the relationship between the responses of these eight sensors to determine whether using two sensors instead of one allows a more precise measurement of the concentration of NOx. Prior investigation has revealed that there may be a nonlinear relationship between the responses of the two sensors, but not much is known about the details of the relationship.

Kernel Smoothers

A kernel smoother is a generalization of local averaging in which different weight functions (kernels) may be used to provide a smoother transition between points than is present in simple local averaging. The default kernel is a box, which provides the local averaging approach described in the introduction.

We will make a scatter plot of sensor 5 versus sensor 6 and experiment with the bandwidth of a simple moving-average smoother (sometimes called a "boxcar" smoother). We begin by using the 2D graph capabilities to simultaneously make the scatter plot and superimpose a moving-average smooth with a default bandwidth choice.

Boxcar smoother

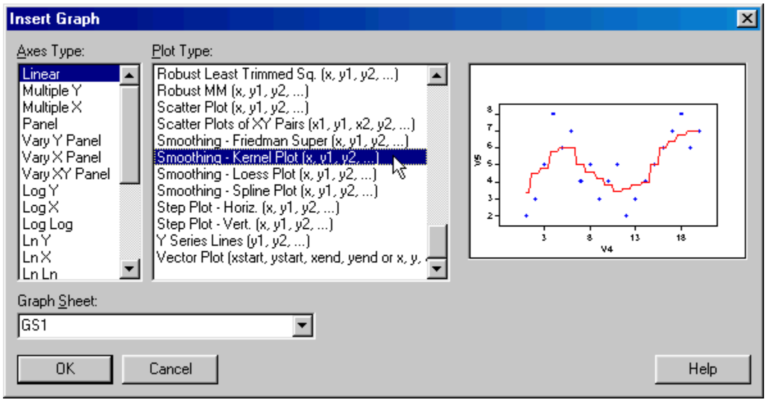
1. From the main menu, choose **Data ▶ Select Data**.
2. In the **Source** group, ensure that **Existing Data** is selected.

3. In the **Existing Data** group, type **sensors** in the **Name** field and click **OK**.

4. Select columns `V5` and `V6`.

5. From the main menu, choose **Graph ▶ 2D Plot** to open the **Insert Graph** dialog.

6. In the **Plot Type** list box, select **Smoothing - Kernel Plot** and click **OK**, as shown in Figure 3.13.


Insert Graph
Robust Least Trimmed Sq. (x, y1, y2, ...)
Robust MM (x, y1, y2, ...)
Scatter Plot (x, y1, y2, ...)
Scatter Plots of XY Pairs (x1, y1, x2, y2, ...)
Smoothing - Friedman Super (x, y1, y2, ...)
Smoothing - Loess Plot (x, y1, y2, ...)
Smoothing - Spline Plot (x, y1, y2, ...)
Step Plot - Horiz. (x, y1, y2, ...)
Step Plot - Vert. (x, y1, y2, ...)
Y Series Lines (y1, y2, ...)
Vector Plot (xstart, ystart, xend, yend or x, y,
Multiple Y
Multiple X
Panel
Vary Y Panel
Vary X Panel
Vary XY Panel
Log Y
Log X
Log Log
Ln Y
Ln X
Ln Ln
OK
Cancel
Help

Axes Type: Linear

Plot Type: Smoothing - Kernel Plot (x, y1, y2, ...)

Graph Sheet: GS1

Figure 3.13: *The **Insert Graph** dialog.*

This results in the plot shown in Figure 3.14, where a not-so-smooth curve is produced that fits the data rather poorly. This is because the smoothing bandwidth is too small for these data.

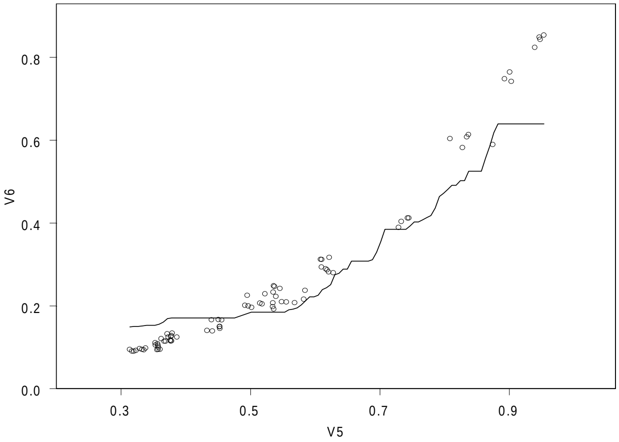


Figure 3.14: *Sensor 5 versus sensor 6 with a box kernel smoother line.*

Experimenting with the bandwidth

1. Now right-click one of the points in the scatter plot (or the curve fit line) and select **Smooth/Sort** from the shortcut menu.
2. On the **Smooth/Sort** page of the **Line/Scatter Plot** dialog, notice the default value for the smoother bandwidth (look in the **Bandwidth** box of the **Kernel Specs** group). Experiment with various bandwidth choices between 0.1 and 0.6 by entering different numbers in the **Bandwidth** box and clicking **Apply** (so that the **Line/Scatter Plot** dialog remains open). Which bandwidth produces the best "by eyeball" curve fit? The smoother with bandwidth choice 0.3 is shown in Figure 3.15.

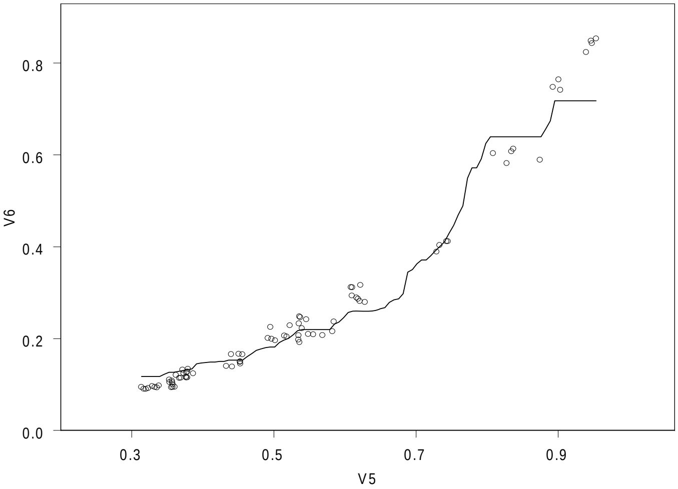


Figure 3.15: *Sensor 5 versus sensor 6 with a box kernel smoother line using bandwidth 0.3.*

Changing the kernel smoother type to Parzen smoother

- With the **Line/Scatter Plot** dialog still open to the **Smooth/Sort** page (open the dialog again if you closed it), select **Parzen** from the **Kernel** pull-down list in the **Kernel Specs** group and click **Apply**. (The Parzen kernel is a box convolved with a triangle.) Experiment again with the choice of bandwidth selection. Do you get a nicer smooth curve fit? The Parzen kernel smoother with bandwidth 0.15 is shown in Figure 3.16.

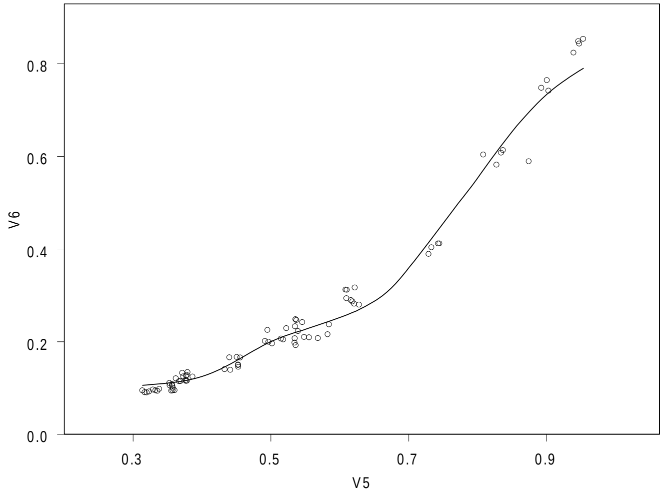


Figure 3.16: *Sensor 5 versus sensor 6 with a Parzen kernel smoother line using bandwidth 0.15.*

Spline Smoothers

Cubic smoothing splines are computed by piecing together a sequence of local cubic polynomials. Smoothness is assured by having the value, slope, and curvature of neighboring polynomials match where they meet. The “smoothing” parameter controls the amount of curvature within the polynomials by governing the trade-off between the degree of smoothness of the curve fit and fidelity to the data values. The more accurately the cubic smoothing spline fits the data values, the rougher the curve is, and conversely.

Spotfire S+ automatically chooses the smoothing parameter using a theoretically justified technique based on the data values. Alternatively, you can specify a smoothing parameter value to control the smoothness of your spline smoother.

Fitting the spline smooth

- Make a scatter plot of sensor 5 versus sensor 6 with the cubic smoothing spline based on automatic bandwidth selection superimposed on the plot. To do so, convert your kernel smooth plot to a spline plot by clicking a point in the plot and then clicking the **Spline** button on the **Plots 2D** palette. The resulting plot is shown in Figure 3.17.

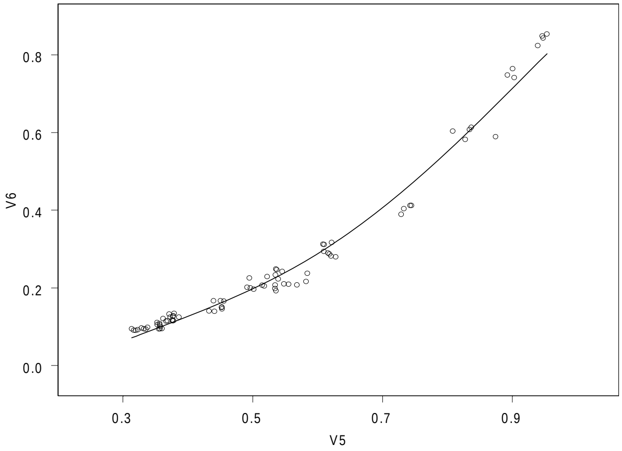


Figure 3.17: *Sensor 5 versus sensor 6 with a spline smoother line.*

Choosing your own bandwidth

- From the shortcut menu for the plot, select **Smooth/Sort**, as before, to open the **Line/Scatter Plot** dialog at the **Smooth/ Sort** page. In the **Smoothing Spline Specs** group, experiment with the values available in the **Deg. of Freedom** (degrees of freedom) pull-down list to control the smoothness of the spline fit. The spline smoother result with 6 degrees of freedom is shown in Figure 3.18.

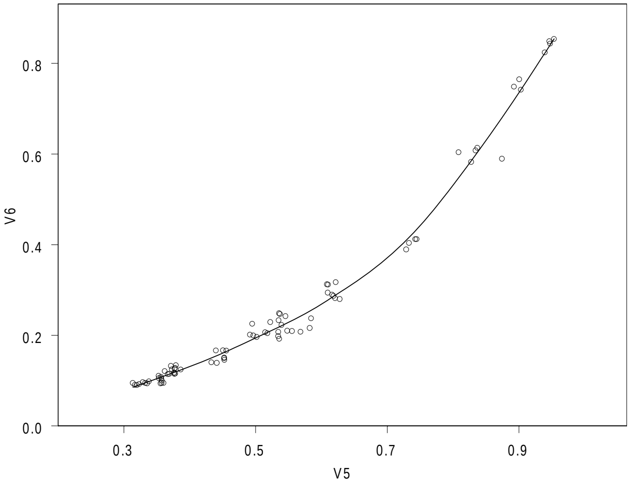


Figure 3.18: *Sensor 5 versus sensor 6 with a spline smoother line using 6 degrees of freedom.*

Loess Smoothers

The loess smoother, developed by W.S. Cleveland and co-workers at Bell Laboratories, is a clever approach based on local linear or local quadratic fits to the data.

Fitting the loess smooth

- Click a point in the plot to select the plot and then click the **Loess** button on the **Plots 2D** palette to make a loess curve fit to the `sensors` data and plot the curve fit with the data. The result is shown in Figure 3.19.

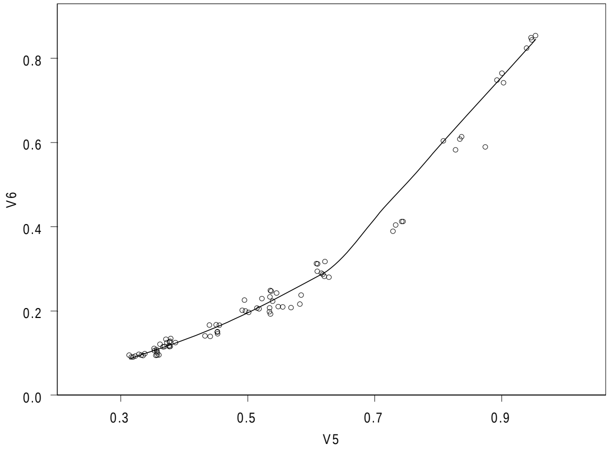


Figure 3.19: *Sensor 5 versus sensor 6 with a loess smoother line using the default bandwidth.*

Varying the bandwidth of the loess smooth

- Open the **Line/Scatter Plot** dialog to the **Smooth/Sort** page. In the **Loess/Friedman Specs** group, notice the three boxes labeled **Span**, **Degree**, and **Family**. Experiment with **Span** values above and below 0.5 (the default value). This number determines the bandwidth as a fraction of the range of the *x*-axis values of the data (in this case, the range of the sensor 5 values). Experiment also with a **Degree** box value of 2 instead of the default value of 1. This number determines whether local linear or local quadratic fits are used.

Line Plots and Time Series Plots

Scatter plots are useful tools for visualizing the relationship between any two variables, one against the other, regardless of whether there is any particular ordering of the horizontal axis variable. On the other hand, often one of the two variables you want to visualize in a scatter plot is ordered, from smallest to largest, according to the row numbers of the data set in which the data are stored.

Line plots are helpful visualizations of the relationship between two variables, as we have seen when overlaying the values of a straight line fit or a nonparametric curve fit on a scatter plot. In these cases, an ordering of the *x*-axis values with corresponding *y*-axis variables is automatically carried out behind the scenes in overlaying the line or curve fit.

Another situation in which the ordering of your data is important is time series data. Here, successive values are measured at successive instants of time. With ordered data, it is useful to make a *line plot* in which the successive values of your data are connected by straight lines, rather than just making a scatter plot of the data. By using straight line segments to connect the points, you can see more clearly the overall trend or shape of your ordered data values.

We return to the variables `tel.gain` and `diff.hstart` contained in the `exmain` data set introduced earlier in the chapter. Both are time series of values recorded once per year on the first of January for the 14 years beginning in 1971. We will use these variables to make line plots and time series plots.

Line Plots

The simple line plot

To make a line plot of the `tel.gain` variable:

1. Use the **Data ▶ Select Data** dialog to open `exmain` or create the data set as described on page 60.
2. Select the `tel.gain` column.

3. Click the **Line** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.20.

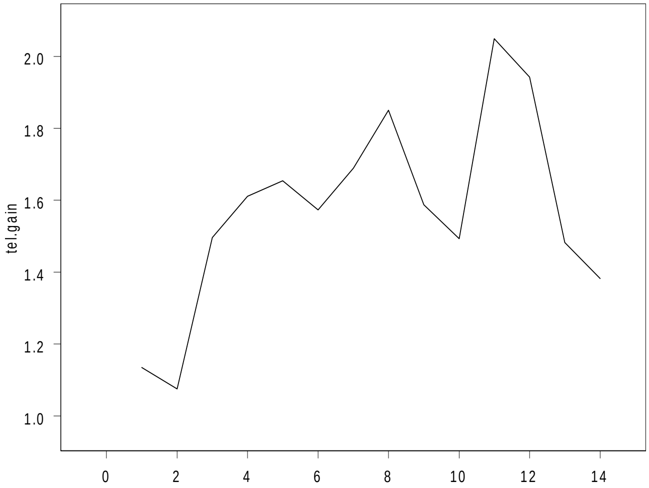


Figure 3.20: *Line plot of* `tel.gain`.

When you select a single variable to plot, Spotfire S+ assumes that this variable is the *y*-axis variable and supplies, as the *x*-axis variable, the integers 1, 2, …, *n*, where *n* is the length of your variable (that is, the number of values in the variable). You will not get a meaningful line plot if you select both `tel.gain` and `diff.hstart`, as Spotfire S+ then assumes the first variable you selected is the *x*-axis variable.

Line with points plot

To create a line plot with symbols superimposed:

1. Click the line plot to select it.

2. Click the **Line Scatter** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.21.

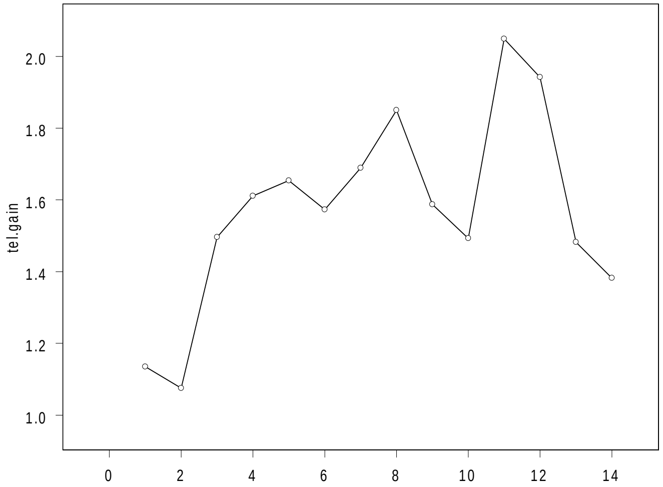


Figure 3.21: *Line with points plot of* `tel.gain`.

Notice that the gains in new residence telephone extensions were at their very lowest during the first two years of the 14-year span, that they rose rapidly in the third year, and that the gain had increasingly wide up and down swings starting in year 6.

Line with isolated points plot

To see the points more clearly, you can create a line plot with scatter plot points isolated from the lines. To make this graph:

1. Click any point or line in the plot to select the plot.

2. Click the **Isolated Points** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.22.

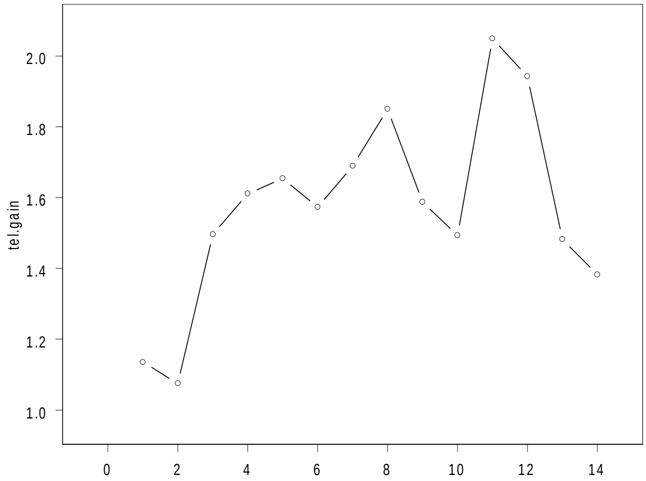


Figure 3.22: *Line with isolated points plot of* `tel.gain`.

Multiple line plots

Now that you have seen the time series behavior of `tel.gain`, you may be interested in seeing that of `diff.hstart` as well, with the line plots for the two time series in the same graph.

You can do this in one of two ways, as follows. The first way is appropriate if you have already made one of the line plots and want to add the second. The second way is appropriate if you want to make both of the line plots at once.

Adding a second line plot

If you have already made the first line plot, as we did above, then you can just add the second line plot in the usual way:

1. Click inside the graph region (but not on the plot) to select the existing graph. Eight green boxes appear along the border of the graph to indicate that the graph is selected.
2. Select the variable `diff.hstart` in the **Data** window.

3. While pressing the SHIFT key, click the **Isolated Points** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.23.

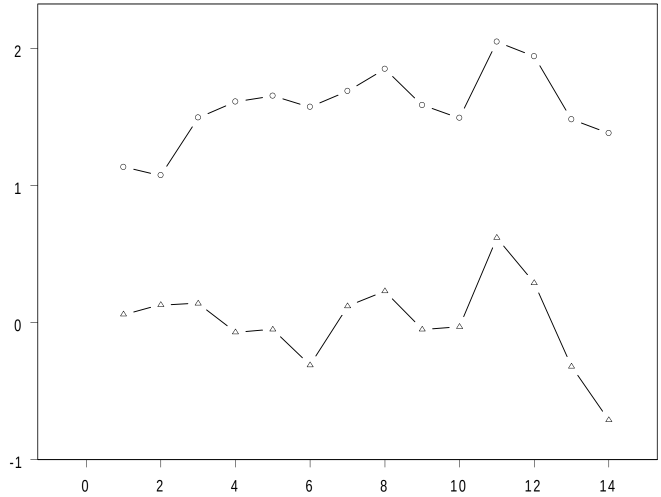


Figure 3.23: *Line with isolated points plots of* `tel.gain` *and* `diff.hstart`*.*

Using the Y Series Lines button

The previous example showed how to add a second line plot to an existing graph. To create multiple line plots at once, we can use the **Y Series Lines** button on the **Plots 2D** palette:

1. Select `tel.gain` and `diff.hstart` (in any order) in the **Data** window.

2. Click the **Y Series Lines** button on the **Plots 2D** palette. The resulting graph, shown in Figure 3.24 below, is very similar to Figure 3.23.

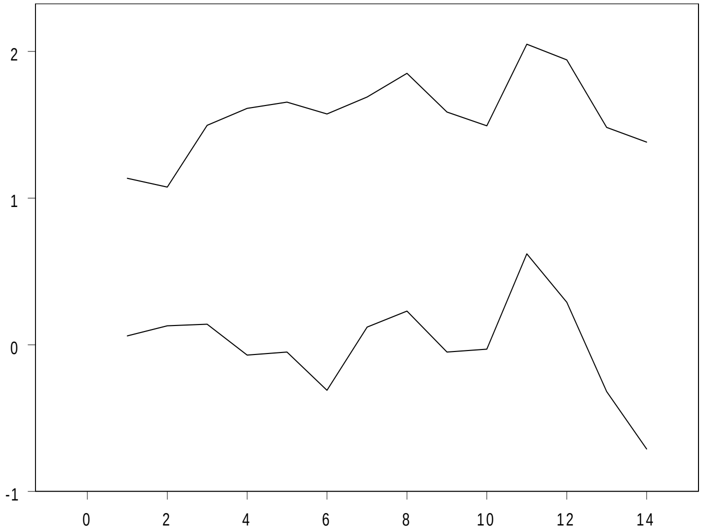


Figure 3.24: *Y series lines plot of* `tel.gain` *and* `diff.hstart`*.*

Adding titles and legends

To add a main title "Main Gain," an *x*-axis title "Year," and a legend to the last graph:

1. From the main menu, choose **Insert ▶ Titles ▶ Main**. Type **Main Gain** where **@Auto** appears in selected form and then click outside the edit box.
2. Select the *x*-axis by clicking on a tick mark (not a tick label).
3. From the main menu, choose **Insert ▶ Titles ▶ Axis**. Type **Year** where **@Auto** appears in selected form and then click outside the edit box.

4. Now click the **Auto Legend** button on the **Graph** toolbar. A legend is automatically created and placed on your graph. You can position the legend by selecting it (click just inside the border of the legend) and dragging it to the desired location. The resulting graph is shown in Figure 3.25.

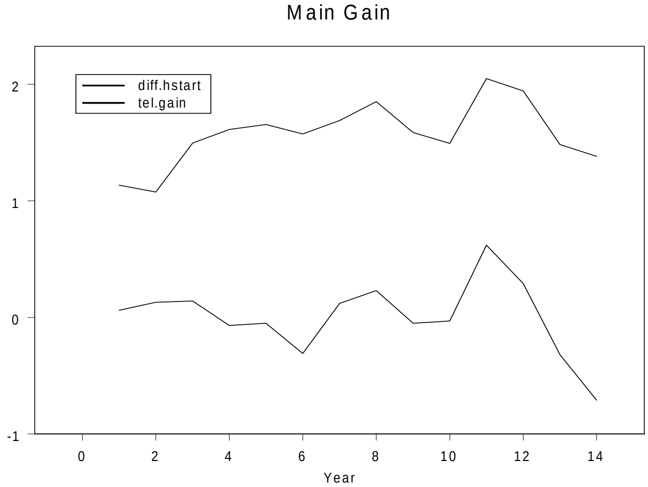


Figure 3.25: *Formatted plots of* `tel.gain` *and* `diff.hstart`.

Plots in separate panels

Since the two time series are scaled somewhat differently, it is useful to look at them in separate panels:

1. Click inside the graph region (but not on the plot) to select the graph. Eight green boxes appear along the border of the graph to indicate that the graph is selected.

2. Click the **Graph Tools** button on the **Graph** toolbar.

3. Click the **Separate Panels with Varying Y Axes** button on the **Graph Tools** palette. See Figure 3.26.

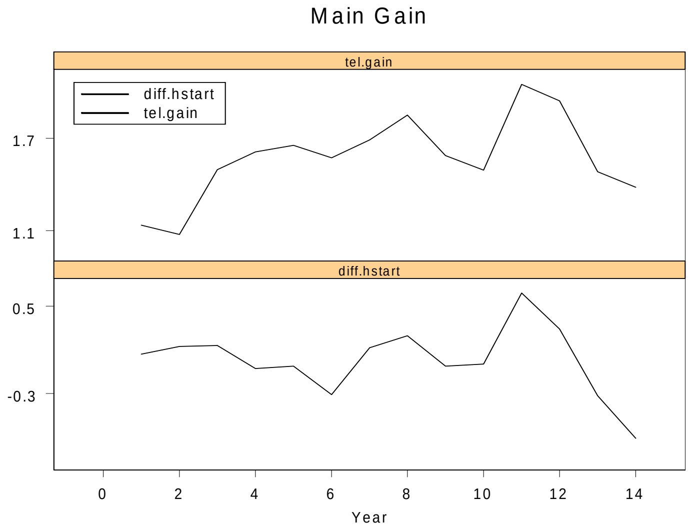


Figure 3.26: *Separate panels with varying Y axes plot.*

Interpreting the main gain plots

Making line plots (time series plots) of `tel.gain` and `diff.hstart` versus time is a simple yet powerful complement to making only a scatter plot of these variables. Using both plot types gives you a more complete understanding of your data.

Earlier in this chapter, we determined that the outliers were in the first two rows of the data set. The time series plots reveal that the values of `tel.gain` during these first two years were the smallest during the entire 14-year history. At the same time, the `diff.hstart` values during the first two years were near their overall average for the 14-year interval. Furthermore, notice that, except for the first four years, there is a striking correlation pattern between the two series; whenever one increases, so does the other. It appears that the relative behavior of the two variables is different during the first 2–4 years from that in the remaining years. This should make you feel more justified in using either the LS fit with the first two years deleted or the robust LTS fit as descriptors of the behavior to be expected beyond year 14.

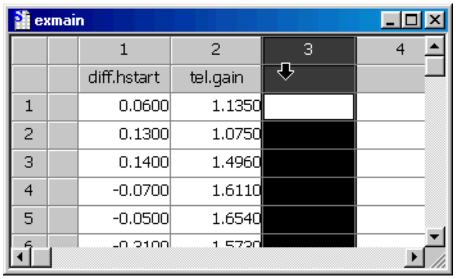
Time Series Plots

Our line plot of the `exmain` data would be much nicer if the actual dates were printed on the *x*-axis (the time axis), instead of the rather anonymous labeling using the integers 1, 2, …, 14. You can do this by creating a third variable, `Year`, specifying the year in which each observation was made.

Creating a dates variable

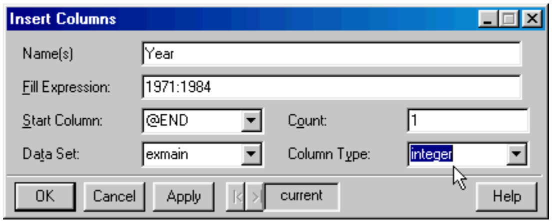
To create an integer variable named `Year`:

1. With the `exmain` **Data** window in focus, select the third (and currently empty) column by clicking at the top of the column.



	1	2	3	4
	diff.hstart	tel.gain		
1	0.0600	1.1350		
2	0.1300	1.0750		
3	0.1400	1.4960		
4	-0.0700	1.6110		
5	-0.0500	1.6540		

2. From the main menu, choose **Insert** ▶ **Column** to display the **Insert Columns** dialog.
3. Type **Year** in the **Name(s)** text box and **1971:1984** in the **Fill Expression** text box. Select **integer** as the **Column Type** and click **OK**. (See Figure 3.27.)



Name(s) Year

Fill Expression: 1971:1984

Start Column: @END

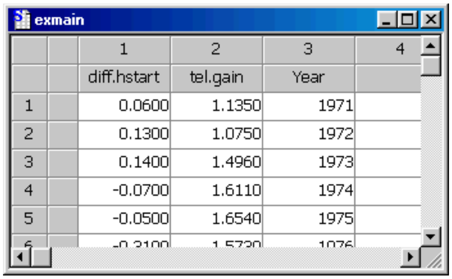
Count: 1

Data Set: exmain

Column Type: integer

Figure 3.27: *The **Insert Columns** dialog.*

The third column now contains integers specifying years as shown below.



		1	2	3	4
		diff.hstart	tel.gain	Year	
1		0.0600	1.1350	1971	
2		0.1300	1.0750	1972	
3		0.1400	1.4960	1973	
4		-0.0700	1.6110	1974	
5		-0.0500	1.6540	1975	
6		-0.3100	1.5730	1976	

4. Select the `Year` column. Press the CTRL key and select `tel.gain` and `diff.hstart` (in either order).

5. Click the **Isolated Points** button on the **Plots 2D** palette. The resulting plot is shown in Figure 3.28.

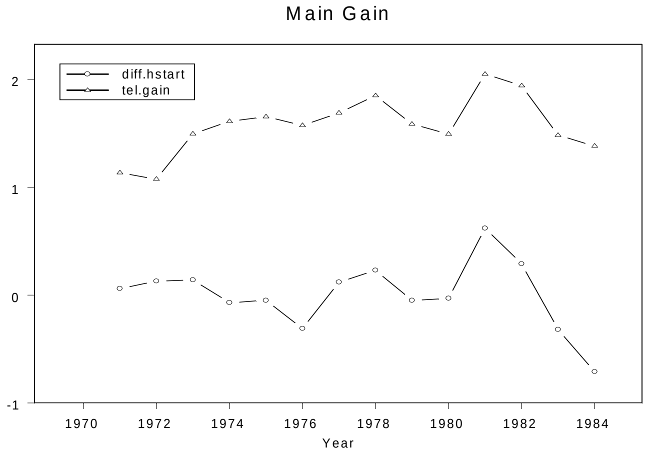


Figure 3.28: *Yearly time series plot of* `tel.gain` *and* `diff.hstart`*.*

VISUALIZING MULTIDIMENSIONAL DATA

In the previous sections, we discussed visualizing simple one- and two-dimensional data sets. With one- and two-dimensional data, all of the basic information in the data may be easily viewed in a single set of plots. Different types of plots (scatter plots, box plots, histograms) provide different types of information, but deciding which plots to use is fairly straightforward.

With multidimensional data, visualization is more involved. In addition to one- and two-variable relationships, variables may have interactions such that the relationship between two variables changes depending on the values of the other variables. In this section, we discuss both standard multidimensional visualization techniques and novel techniques, such as Trellis graphics.

We begin with scatter plots and scatterplot matrices for multidimensional data. Next, we describe Trellis graphics, which are particularly useful for discovering higher-dimensional relationships in data, and then we present plots designed for three-dimensional data. Finally, we conclude with the brush and spin interactive dynamic graphics tools.

Scatter Plots and Scatterplot Matrices

We can use 2D scatter plots to view multidimensional data by varying symbol attributes, such as color, style, and size.

Scatterplot matrices are powerful graphical tools that enable you to quickly visualize multidimensional data. Often, when faced with the task of analyzing data, the first step is to get familiar with the data. Generating a scatterplot matrix greatly facilitates this process.

The Fuel Data

The `fuel.frame` data set contains information on 60 makes of cars taken from the April, 1990 issue of *Consumer Reports*. The variables are:

- `Weight`: Automobile weight
- `Disp.`: Engine displacement (6 liter, 8 liter, etc.)
- `Mileage`: Mileage in miles per gallon
- `Fuel`: 100/mileage

- `Type`: Category of vehicle (`Large`, `Medium`, `Small`, `Compact`, `Sporty`, `Van`)

How do these variables relate to each other?

Color Plots

First, let's focus on the relationship between automobile weight, mileage, and type of car. We will begin by generating a scatter plot with symbol color varying based on type.

Generating a color plot with a legend

1. Use the **Select Data** dialog to display the `fuel.frame` data set in a **Data** window.
2. Click `Weight` and then CTRL-click `Mileage` and `Type`.
3. Click the **Color** button on the **Plots 2D** palette.
4. Click the **Auto Legend** button on the **Graph** toolbar.

Varying the symbol style

To further highlight the different categories of vehicle, we can vary the symbol style:

1. Right-click any of the plot symbols and select **Vary Symbols** from the shortcut menu.
2. Change **Vary Style By** to **z Column**. (Verify, by looking in the **Data Columns** group on the **Data to Plot** page of the dialog, that `Type` has been specified as the *z* column.)

3. Click **OK**. (You can change the defaults for symbol styles and colors; see Chapter 11, Customizing Your Spotfire S+ Session, for more information.) Figure 3.29 displays the resulting color and symbol plot.

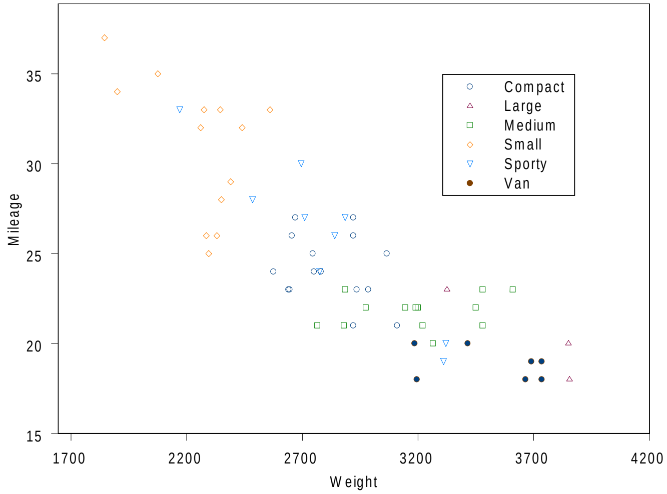


Figure 3.29: *Color plot of* `Mileage` *by* `Weight` *with color and symbol style varying by* `Type` *for the* `fuel.frame` *data.*

Notice that, over all cars, mileage tends to decrease as automobile weight increases. However, the relationship varies between car types. For example, `Sporty` cars have a wide range of weights and mileages.

Scatterplot Matrices

Next, we will create a scatterplot matrix, viewing the relationships between all the variables in the data set simultaneously.

Generating a scatterplot matrix

1. Since we want to plot all the variables in the data set, we select all the variables by clicking in the upper left-hand corner of the **Data** window (every column will turn black).

Note

The order in which you select the data columns determines the order in which they appear on the scatterplot matrix. In the above case, we did not care about the order, but if we did, we could CTRL-click the columns and select them in the desired order.

2. Click the **Scatter Matrix** button on the **Plots 2D** palette. The resulting scatterplot matrix is shown in Figure 3.30.

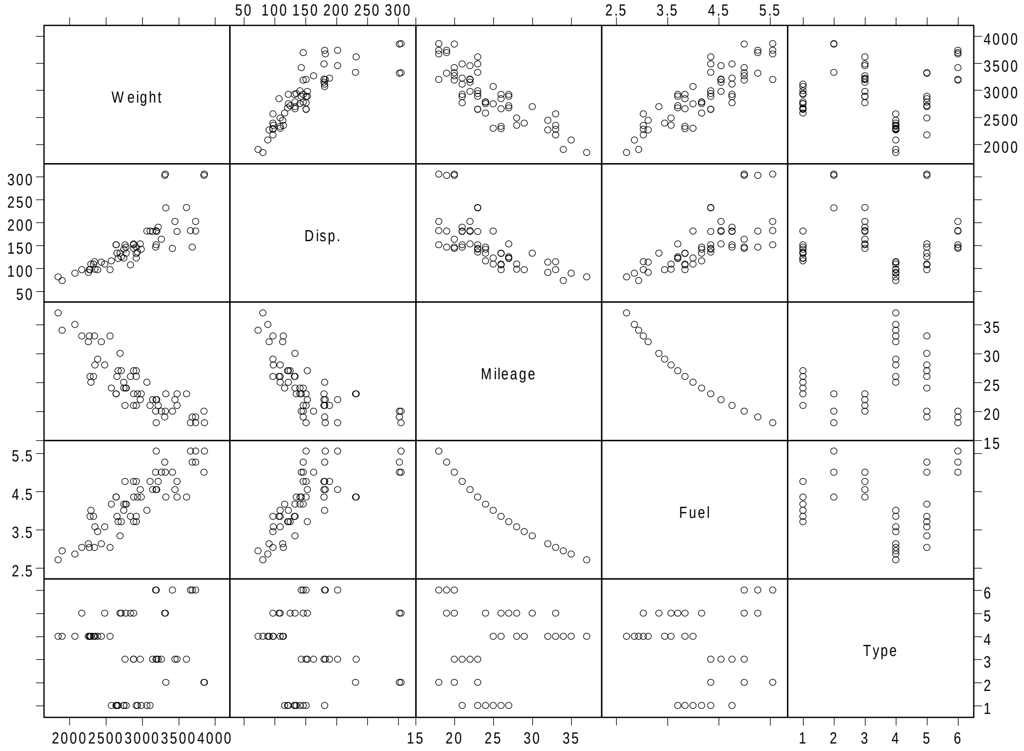


Figure 3.30: *Scatterplot matrix of the* `fuel.frame` *data. A number of strong relationships appears.*

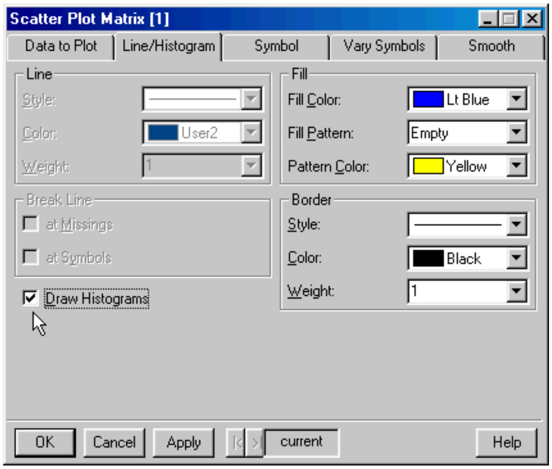
Examine the plot. You can immediately see a number of strong linear relationships. For example, as might be expected, the weight of the car and its fuel consumption have a positive linear relationship (as `Weight` increases, so does `Fuel`). The scatterplot matrix gives you a quick and concise overview of the more obvious two-variable relationships in the data.

Adding histograms

Now let's add histograms of the five variables displayed in Figure 3.30:

1. Right-click any data point to display the plot's shortcut menu and select **Line/Histogram**.

2. On the **Line/Histogram** page of the **Scatter Plot Matrix** dialog, select the **Draw Histograms** check box by clicking it.



Line
Style:
Color: User2
Weight: 1

Break Line
□ at Missings
□ at Symbols

☑ Draw Histograms

Fill
Fill Color: Lt Blue
Fill Pattern: Empty
Pattern Color: Yellow

Border
Style:
Color: Black
Weight: 1

Figure 3.31: *The **Line/Histogram** page of the **Scatter Plot Matrix** dialog.*

3. Click **OK** to redraw the scatterplot matrix with histograms.

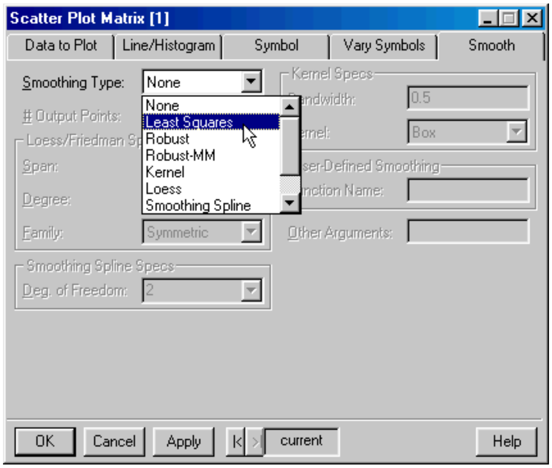
The histograms provide you with additional useful information. For example, the variables `Weight`, `Disp.`, and `Fuel` seem to have normal or close-to-normal distributions. In contrast, the variable `Mileage` is perhaps not normally distributed. These conjectures would need to be investigated further before we could draw any conclusions.

Adding least squares lines

Spotfire S+ can fit a variety of lines through our scatter plots. We can fit least squares, robust, kernel, loess, and smoothing splines through the matrix plots. For example, to add least squares lines to Figure 3.30, do the following:

1. Right-click any data point to display the plot's shortcut menu and select **Smooth**.

2. On the **Smooth** page of the **Scatter Plot Matrix** dialog, select **Least Squares** from the **Smoothing Type** pull-down list and click **Apply**.



Smoothing Type: None

Bandwidth: 0.5

Kernel: Box

Function Name:

Family: Symmetric

Deg. of Freedom: 2

Figure 3.32: *The **Smooth** page of the **Scatter Plot Matrix** dialog.*

3. Try experimenting with different types of lines and smoothing parameters. Click **OK** to close the dialog when you are finished and then close all windows.

The Sensors Data

As you will recall, the `sensors` data contain the responses of eight different semiconductors designed to be responsive in different ways to gases in the air, for example, for pollution monitoring. The data contain 80 observations. The question is whether additional sensors, beyond one, really improve pollutant detectability.

Bubble Color Plots

We begin by creating a bubble color plot in which we use *x* value, *y* value, symbol size, and symbol color to each display a variable. This allows us to represent four variables in a single scatter plot.

1. Use the **Select Data** dialog to display the `sensors` data in a **Data** window.

2. Select the first four columns of the data.

3. Click the **Bubble Color** button on the **Plots 2D** palette. As in a standard scatter plot, `V1` will be used as the *x*-axis values and `V2` as the *y*-axis values. The size of the symbols will vary with the value of `V3`. Similarly, the symbol color will vary with the value of `V4` (with lighter values when `V4` is larger).

4. Now click the **Color Scale Legend** button on the **Graph** toolbar to add a legend relating the `V4` value to the color of each point. (You can modify symbol size and color ranges on the **Vary Symbols** page of the **Line/Scatter Plot** dialog.) The resulting plot is shown in Figure 3.33.

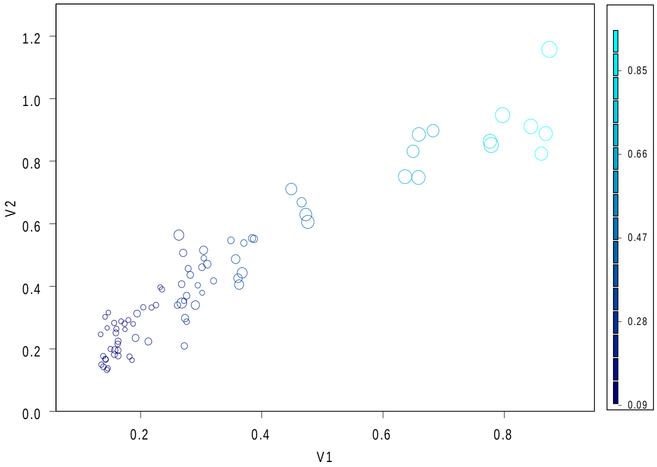


Figure 3.33: *Bubble color plot of the* `sensors` *data.*

In this data set, the four variables `V1` through `V4` tend to move together. For example, as we move to the upper right of the plot, the symbols are larger and lighter.

Multiple Plots in a Graph

Another useful way to compare relationships is to create multiple scatter plots in the same graph. This will plot multiple *y* variables sharing the same *x* variable.

1. Select the first four columns of the `sensors` data.

2. Click the **Scatter** button on the **Plots 2D** palette. Three scatter plots are created on the same graph.

3. Click the **Auto Legend** button to add a legend. The resulting graph is shown in Figure 3.34.

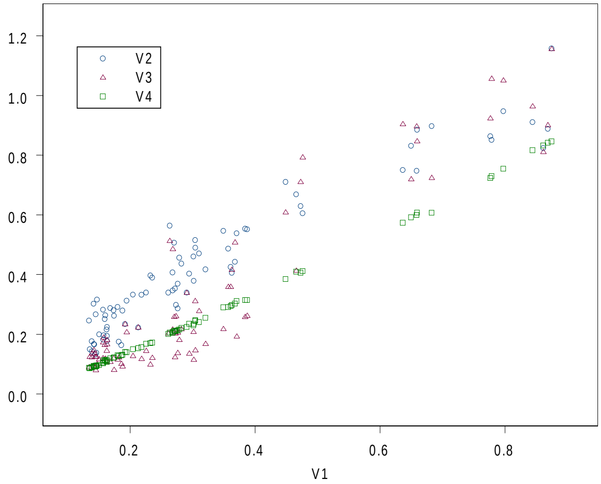


Figure 3.34: *Multiple plots in a graph for the* `sensors` *data.*

Plots in separate panels

We can also view the three plots in separate panels with a shared *x*-axis.

1. Click inside the graph (but not on a point) to select the graph.
2. Open the **Graph Tools** palette by clicking the **Graph Tools** button on the **Graph** toolbar.
3. Click the **Separate Panels with Varying Y Axes** button on the **Graph Tools** palette. Three scatter plots are created in separate panels.

4. Remove the legend by selecting it and pressing the DELETE key. The resulting graph is shown in Figure 3.35.

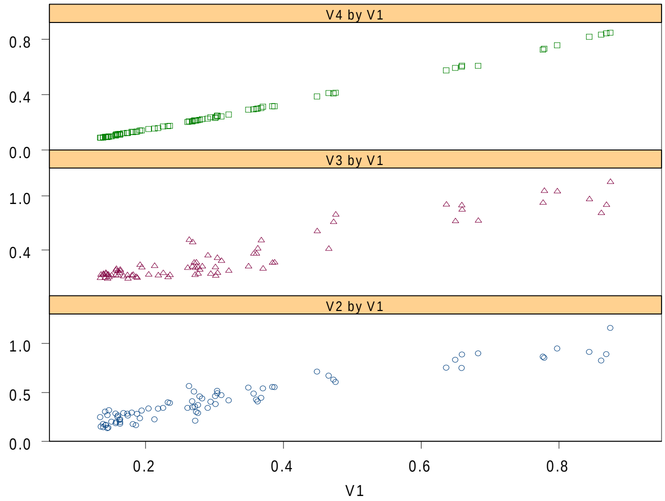


Figure 3.35: *Multiple plots in separate panels for the* `sensors` *data.*

Notice that the relationship between `V1` and `V4` is very close. The points fall almost exactly along a straight line. The relationships between `V1` and the other two variables (`V2` and `V3`) show more variation.

Scatterplot Matrices

Now we will create a scatterplot matrix to view all of the variables.

1. Select all of the columns in the `sensors` data by clicking in the upper left-hand corner of the **Data** window.

2. Click the **Scatter Matrix** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.36.

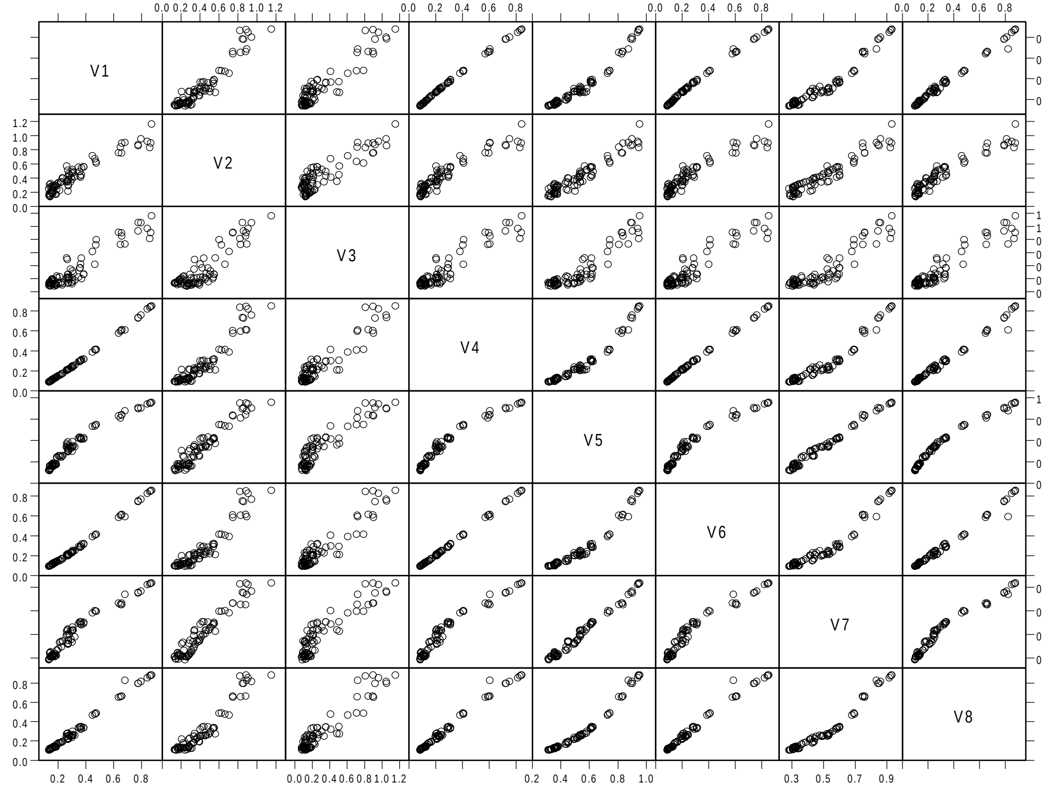


Figure 3.36: *Scatterplot matrix of eight different pollution sensors.*

Examine the plot. If the sensors vary in their ability to detect pollution, we would expect to see some nonlinear relationships. Look closely at the relationship between sensors 4 and 5, 5 and 6, 6 and 7, and 7 and 8. Do you see the nonlinear relationships (the curve in the lines)? It seems that some of these sensors vary in their ability to detect gases, so adding more than one sensor may increase detectability of the gases.

Trellis Graphs

Trellis graphs allow you to view relationships between different variables in your data set through conditioning. Suppose you have a data set based on multiple variables and you want to see how plots of two variables change with variations in a third "conditioning" variable. By using Trellis graphics, you can view your data in a series of panels where each panel contains a subset of the original data divided into intervals of the conditioning variable.

A wide variety of graphs can be conditioned using Trellis graphics.

The Ethanol Data

The sample data set `ethanol` contains measurements of pollutants in automobile exhaust. Data were collected to analyze oxides of nitrogen in the exhaust. An experiment was done on a one-cylinder engine fueled by ethanol. Two engine factors were studied: the equivalence ratio (`E`), a measure of the richness of the air and fuel mixture, and the compression ratio to which the engine is set (`C`). There were 88 runs of the experiment. Here we will examine the relationship between the oxides of nitrogen (`NOx`) and the compression ratio.

Creating a loess plot

1. Use the **Select Data** dialog to open the `ethanol` data in a **Data** window.
2. Select the `C` column. Press the CTRL key and select the `NOx` column.
3. Click the **Loess** button on the **Plots 2D** palette to create a scatter plot with a loess smooth, as shown in Figure 3.37.

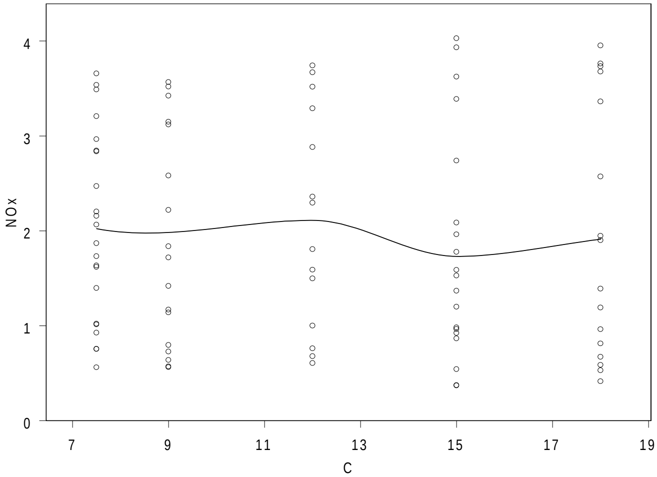


Figure 3.37: *Compression ratio versus nitrogen oxide in the* `ethanol` *data set (default smoothing).*

4. Close all windows other than the current **Graph Sheet** and the `ethanol` **Data** window. From the main menu, choose **Window ▶ Tile Vertical** to display the two windows side by side.

Adjusting the smoothing parameter

- Right-click any symbol of the plotted loess line to display the shortcut menu for the plot and select **Smooth/Sort**. In the **Loess/Friedman Specs** group, type **1** in the **Span** box and click **OK**. An increase in the span parameter results in a smoother line, as shown in Figure 3.38.

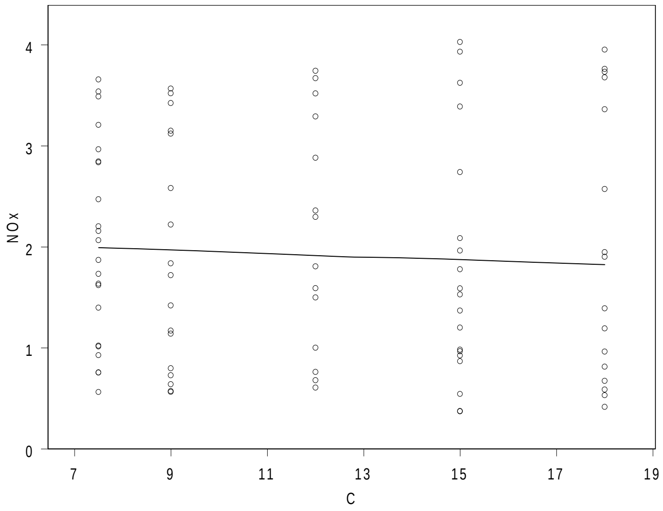
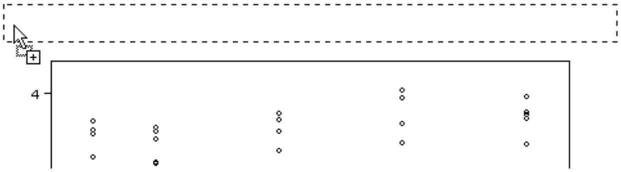


Figure 3.38: *Compression ratio versus nitrogen oxide in the* `ethanol` *data set (span of 1).*

Trellis Graphs

There appears to be little dependence of the oxides of nitrogen on the compression ratio. However, hidden from this scatter plot is the fact that `E` is varying as we move from point to point. The next step is to condition the plot on `E` to further examine the relationship.

1. Select the `E` column in the **Data** window. Move the cursor to the middle of the column. Press and hold the mouse button. While holding down the button, drag the cursor to the top of the graph. As the cursor passes over the top of the graph, a rectangular drop target appears.



2. Release the mouse button when the cursor is within the rectangle. The graph is redrawn in panels representing the different levels of `E`.

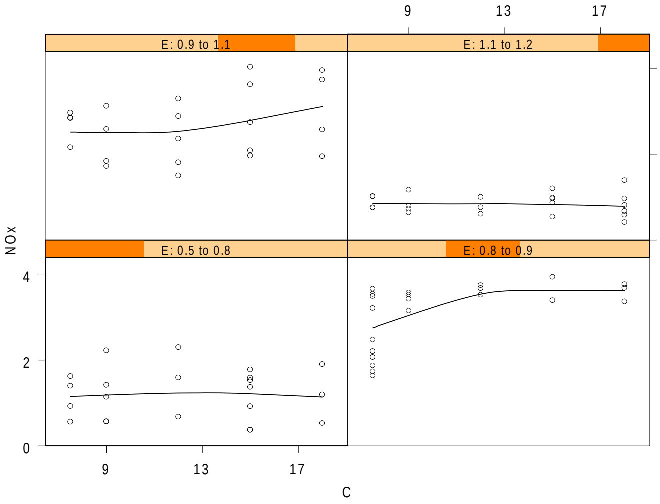


Figure 3.39: *Compression ratio versus nitrogen oxide conditioned on equivalence ratio (defaults).*

Modifying the conditioning rules

By default, the conditioning variable is broken into four disjoint groups with an equal number of observations per group. We can break the data into more groups and change other values controlling the conditioning.

1. Right-click an empty space within the graph to display the shortcut menu for the graph and select **Multipanel**.
2. In the **Continuous Conditioning** group, type **9** for **# of Panels** and **0.25** for **Frac. Shared Pts.**
3. In the **Layout** group, type **2** for **# of Rows**.
4. Click the **Position/Size** tab of the dialog. Type **2.5** for **Aspect Ratio** and click **OK**. The resulting graph is shown in Figure 3.40.

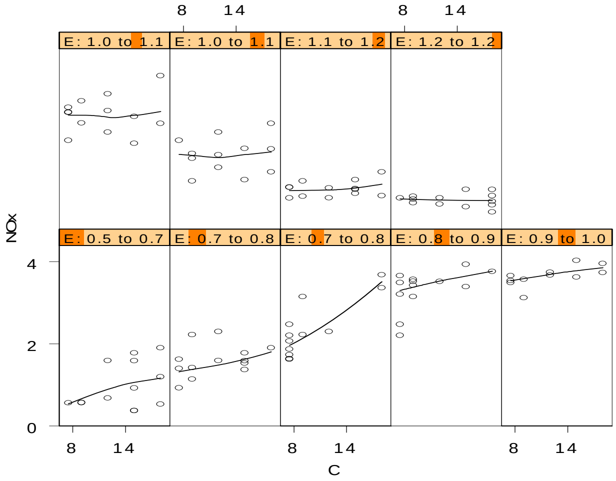


Figure 3.40: *Compression ratio versus nitrogen oxide conditioned on equivalence ratio.*

The Trellis graph now has nine panels in two rows, and each panel has an aspect ratio of 2.5. The range of E used for each panel is determined using the default equal-count method with a 25% overlap. The algorithm picks interval end points that are values of the data; the left end point of the lowest interval is the minimum of the data, and the right end point of the highest interval is the maximum of the data. The end points are chosen to make the counts of points in the intervals as nearly equal as possible and the fractions of points shared by successive intervals as close to the target fraction as possible. Overlapping ranges typically provide greater sensitivity in detecting non-homogeneity than non-overlapping ranges.

The conditioned plot shows a clear positive relationship between the oxides of nitrogen and the compression ratio for low values of `E`. For high values of `E`, the slope is close to zero. In each panel, the pattern appears linear.

Changing the plot type

Since the patterns appear to be linear, let's redraw the Trellis graph using a least squares fit.

1. Click any point in the plot to select the plot.

2. Click the **Linear Fit** button on the **Plots 2D** palette. The graph is redrawn using a linear fit.

The Barley Data

The sample data set `barley` contains data from an agricultural field trial to study the crop barley. At six sites in Minnesota, ten varieties of barley were grown in each of two years. The data are the yields for all combinations of site, variety, and year, so there are 6 x 10 x 2 = 120 observations.

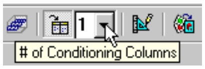
The barley experiment was run in the 1930s. The data first appeared in a 1934 report published by the experimenters. Since then, the data have been analyzed and re-analyzed. R.A. Fisher presented the data for five of the sites in his classic book, *The Design of Experiments.* Publication in the book made the data famous, and many others subsequently analyzed them, usually to illustrate a new statistical method.

In the early 1990s, Bill Cleveland of AT&T (now Lucent Technologies) analyzed the data again using Trellis graphics. The result was a big surprise. Through 50 years and many analyses, an important feature of the data had gone undetected. The basic analysis is repeated here.

Trellis Graphs

We are interested in exploring how barley yield varies based on combinations of the other variables. Trellis is particularly useful for displaying the effects of covariates and their interactions. We will use a color plot with conditioning to display the fourth and fifth variables.

1. Use the **Select Data** dialog to display the `barley` data in a **Data** window.
2. Select the `yield` column. Then press the CTRL key and select `variety`, `year`, and `site`. The order of the variables selected determines how they will be used in the color plot. The first variable (`yield`) will be used as *x*, the second (`variety`) as *y*, and the third (`year`) to determine the color of the symbols. The last variable (`site`) will be used as the conditioning variable.
3. Now open the **Plots 2D** palette. Turn conditioning mode on by clicking the **Set Conditioning Mode** button on the **Standard** toolbar. (The small yellow bars at the top of each of the icons on the **Plots 2D** palette indicate that conditioning mode is on.)
4. Ensure that # **of Conditioning Columns** is set to **1**.



5. Click the **Color** button on the **Plots 2D** palette. A Trellis graph appears showing barley yield for each variety, conditioned on the site. The yields for 1931 and 1932 appear in different colors. The resulting graph is shown in Figure 3.41.

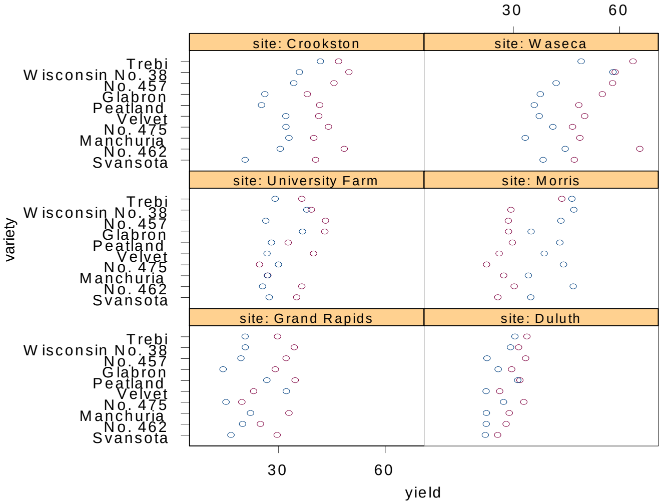


Figure 3.41: *Unformatted Trellis plot of barley yields for 1931 and 1932.*

6. Turn conditioning mode off (click the **Set Conditioning Mode** button again), maximize the new **Graph Sheet**, and close the **Plots 2D** palette.

Formatting the panels

To make it easier to compare yields across sites, we will make three changes to the layout of the panels: Stack them in one column, reorder them according to the median of the yield data shown in each panel, and set the aspect ratio of each panel to 0.5.

1. Right-click an empty space within the graph to display the shortcut menu for the graph and select **Multipanel**.
2. In the **Conditioning Columns** group, set **Order Type** to **Median of X**.
3. In the **Layout** group, type **1** for **# of Columns**.
4. Click the **Position/Size** tab of the dialog. Type **0.5** for **Aspect Ratio** and then click **OK**.

Adding a legend

Now add some final touches to your plot: Add a legend and vary the symbol styles, as well as the symbol colors, for the two years.

- Click the **Auto Legend** button ☰ on the **Graph** toolbar. A legend is automatically created and placed on your graph. You can position the legend by selecting it (click just inside the border of the legend) and dragging it to the desired location.

Varying the symbols

1. Right-click any symbol on the plot to display its shortcut menu and select **Vary Symbols**.
2. On the **Vary Symbols** page, set **Vary Style By** to **z Column** so that both the color and symbol styles vary by year. (You can change the defaults for symbol styles and colors; see Chapter 11, Customizing Your Spotfire S+ Session, for more information.)
3. Click **OK**. Notice that the legend has been updated to reflect the new symbol styles. Your final Trellis plot should look similar to the one shown in Figure 3.42.

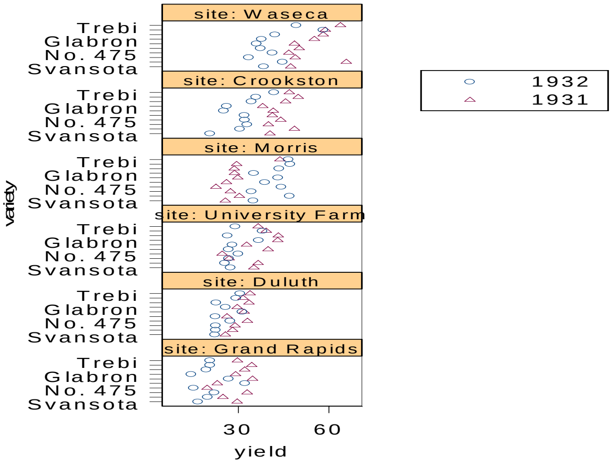


Figure 3.42: *Formatted Trellis plot of barley yields for 1931 and 1932.*

Now examine your graph to find the long-undetected discrepancy. It appears in the Morris panel. For all other sites, 1931 produced a significantly higher overall yield than 1932. The reverse is true at Morris. But most importantly, the amount by which 1932 exceeds 1931 at Morris is similar to the amounts by which 1931 exceeds 1932 at the other sites. Either an extraordinary natural event, such as disease or a local weather anomaly, produced a strange coincidence, or the years for Morris were inadvertently reversed. More Trellis graphics, a statistical modeling of the data, and some background checks on the experiment led to the conclusion that the data are in error. But it was a Trellis graphic, such as that created in Figure 3.42, that provided the "Aha!" that led to the conclusion.

Three-Dimensional Plots

The scatter plots, scatterplot matrices, and Trellis plots discussed in the preceding sections may all be used to display three-dimensional data. In addition, 3D scatter plots, surface plots, and contour plots are available. These plots are particularly suited for plotting points in three-dimensional space, including plotting one variable as a function of the other two variables.

In Spotfire S+ we consider some plots to be 2D plots and others to be 3D plots. This distinction is based upon the type of axes used. This section discusses:

- 3D scatter plots
- Surface plots
- Contour plots

The first two plots are considered to be 3D plots because they use 3D axes to represent their points in three-dimensional space. The contour plot is a 2D plot in which the third variable is represented by contour lines or fill colors.

3D Scatter Plots

A 3D scatter plot displays the variable values as locations in three-dimensional space.

Sliced ball data

We begin by examining a set of simulated data contained in the `sliced.ball` sample data set. The points are uniformly distributed within a sphere, with the exception of a structural feature that we will attempt to discover.

First we create a scatterplot matrix and a Trellis plot with these data and then create 3D scatter plots.

Scatterplot matrix

1. Use the **Select Data** dialog to display the `sliced.ball` data in a **Data** window.
2. Select all three columns.
3. Click the **Scatter Matrix** button ▦ on the **Plots 2D** palette. Each panel displays an apparently random ball of data, as shown in Figure 3.43.

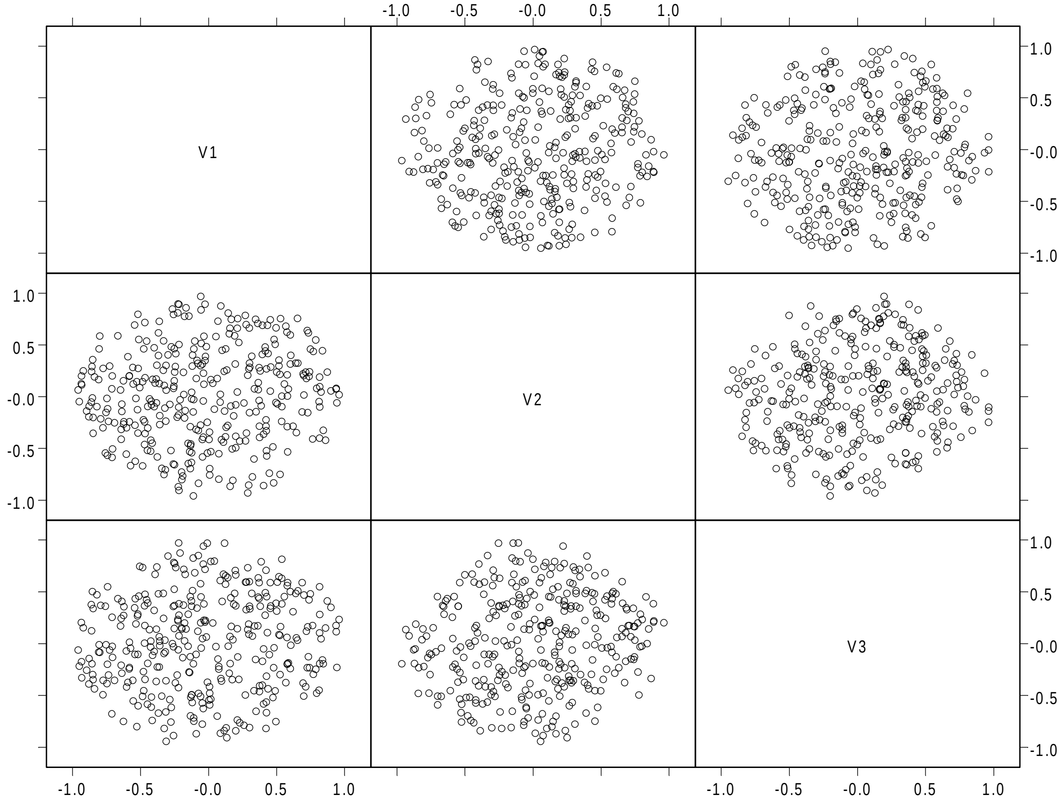


Figure 3.43: *Scatterplot matrix of the sliced ball data.*

There are no obvious relationships between any two columns of data, so the bivariate plots suggest that the data are randomly distributed within the sphere. No other relationships are apparent.

Trellis plot

The limitation of bivariate plots is that they do not allow us to look at interactions between variables. For example, how does the relationship between `V1` and `V2` depend on `V3`? We can use Trellis plots to look for such interactions.

1. Turn on conditioning mode by clicking the **Set Conditioning Mode** button on the **Standard** toolbar. (The small yellow bars at the top of each of the icons on the **Plots 2D** palette indicate that conditioning mode is on.)
2. Ensure that **# of Conditioning Columns** is set to **1**. With these settings, multiple panels will be created with the data grouped based on the values of the last selected column.
3. Select `V1` and then CTRL-click to select columns `V2` and `V3`.
4. Click the **Scatter** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.44.

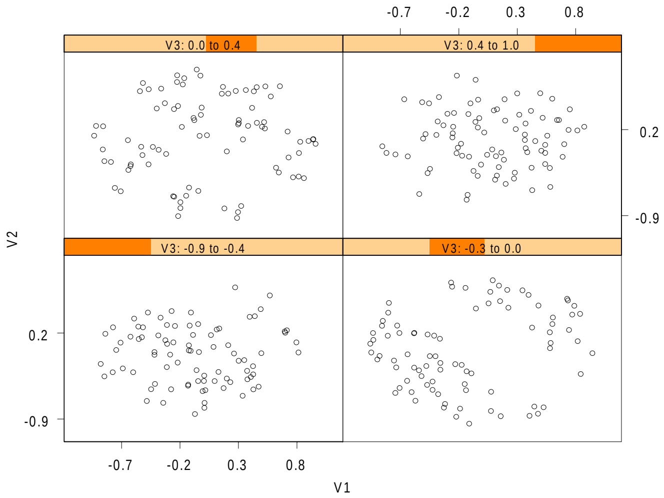


Figure 3.44: *Trellis plot of the sliced ball data.*

5. Turn conditioning mode off by again clicking the **Set Conditioning Mode** button on the **Standard** toolbar. (If you skip this step, you may inadvertently have conditioning mode on in the subsequent plot.)

The data points are divided into four groups. Data points with values of `V3` between -0.9 and -0.4 are shown in the lower left panel. Data points with the next highest values of `V3` are shown in the panel to the right. Notice that there is a diagonal gap running through the data. This is also evident in the upper left panel. This suggests that the data are not, in fact, random throughout the sphere.

3D scatter plots

To explore further, we can create a 3D scatter plot. This is perhaps the most natural plot to use for these data, since the data represent points in three-dimensional space.

1. Select all three columns in the **Data** window.

2. Click the **3D Scatter** button on the **Plots 3D** palette. The resulting graph is displayed in Figure 3.45.

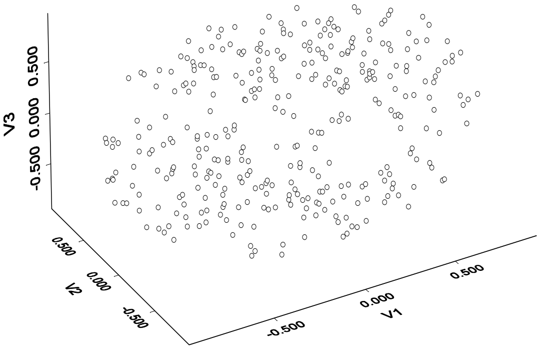


Figure 3.45: *Three-dimensional scatter plot of the sliced ball data.*

Note that, unlike the previous plot, this plot uses 3D axes reflecting the location of points in three-dimensional space.

Rotating 3D plots

A single 3D scatter plot gives one view on the point cloud. To gain an understanding of the overall structure, it's useful to look at the point cloud from multiple viewing angles. We can rotate the axes to view the points from a different angle.

1. Click an empty space within the graph region to select the 3D workbox. Four green circles and a green triangle appear. (If only a solitary green knob appears, you have clicked on the plot rather than the workbox–try again.)

2. Drag horizontally on one of the green circles. A bounding box will appear and rotate in the direction you drag the mouse. When you release the mouse, the graph is redrawn at the new perspective. The green triangle can be dragged up and down to rotate the graph vertically. Experiment with rotating the graph.

Multiple panels

It's often useful to look at the point cloud from different angles simultaneously. We can do this by using a multipanel plot with different rotations of the data in each panel.

1. Click within the graph to select the graph region. Eight green boxes appear along the border of the graph to indicate that the graph is selected.

2. Click the **6 Panel Rotation** button on the **Plots 3D** palette. The resulting graph is displayed in Figure 3.46.

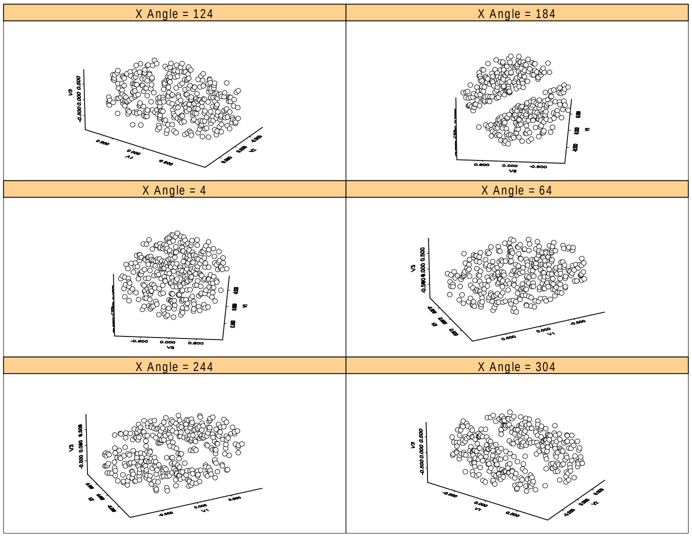


Figure 3.46: *Multiple panel 3D scatter plot of the sliced ball data.*

The multiple panel 3D scatter plot is particularly clear in uncovering the slice in the sliced ball data. Viewing the data in 3D allows us to look at angles other than those displayed in the bivariate plots. This helps us to discover higher-dimensional structure.

Another way to examine these data is using brush and spin. This is discussed in Dynamic Graphics on page 113.

Surface Plots

Surface plots are three-dimensional surfaces reflecting the value of a variable over different values of two other variables. Data used in a surface plot are often over a grid of values. If the data available are not on a grid, interpolation is used to fit a surface over a grid, which is then plotted.

Example surface data

The sample data set `exsurf` contains two columns representing a grid of values and a third column that is the value of a function over the grid. The help file for `exsurf` describes the equation used.

Creating surface plots

First we will create a surface plot of these data.

1. Use the **Select Data** dialog to display the `exsurf` data in a **Data** window.
2. Select all three columns in the **Data** window.
3. Click the **Data Grid Surface** button ▦ on the **Plots 3D** palette. The resulting graph is displayed in Figure 3.47.

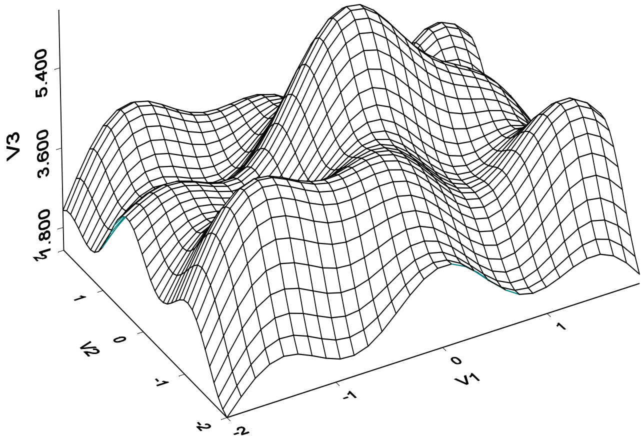


Figure 3.47: *Surface plot of the `exsurf` data.*

4. Using the same procedure as for 3D scatter plots, rotate the plot to examine it from multiple angles.

Creating a filled surface

Next we will create a filled surface.

1. Click a line in the 3D mesh to select the plot.

2. Click the **16 Color Surface** button on the **Plots 3D** palette to convert the surface to a filled surface plot with color varying by *z* value.

3. Click the **Color Scale Legend** button on the **Graph** toolbar to add a legend. The resulting graph is shown in Figure 3.48.

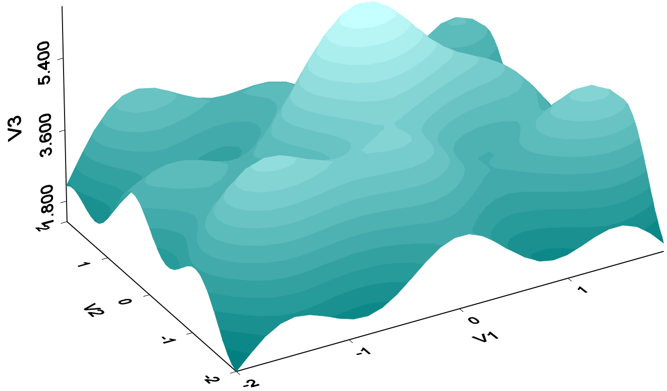


Figure 3.48: *Filled surface plot of the* `exsurf` *data.*

Contour Plots

Contour plots are flat, two-dimensional representations of three-dimensional data. They are often used for data collected on a grid. If the data available are not on a grid, interpolation is used to fit contours over a grid, which are then plotted.

Creating a contour plot

1. Select all three columns in the `exsurf` **Data** window.

2. Click the **Contour** button on the **Plots 2D** palette. The resulting graph is shown in Figure 3.49.

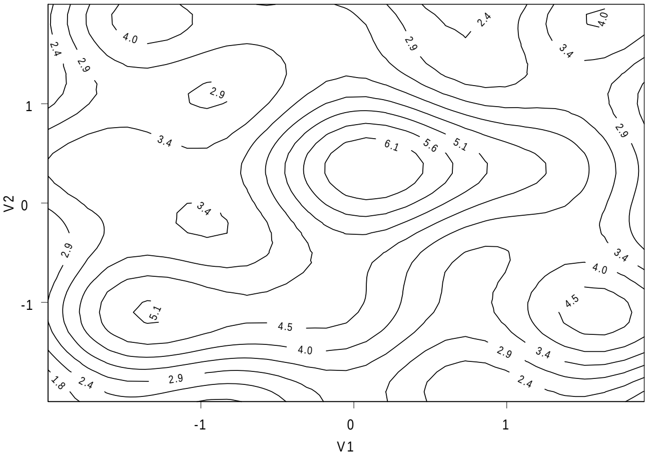


Figure 3.49: *Contour plot of the* `exsurf` *data.*

The lines on a contour plot indicate locations of equal magnitude. Contour plots are read in the same manner as contour maps. They point out minima and maxima, as well as the slope of the surface in various regions.

Filled contour plots

A useful enhancement to a contour plot is to add color indicating the magnitude of the *z* variable at each location.

1. Click any contour in the plot to select the plot.

2. Click the **Filled Contour** button on the **Plots 2D** palette. The plot is changed to a filled contour plot.

3. Right-click the plot to display the shortcut menu and select **Contour/Fills** to open the **Contour Plot** dialog. Change the **Fill Type** to **2 Color Range**. Click **OK**. The resulting contour plot has colors between **Blue** and **Lt Cyan**, as shown in Figure 3.50.

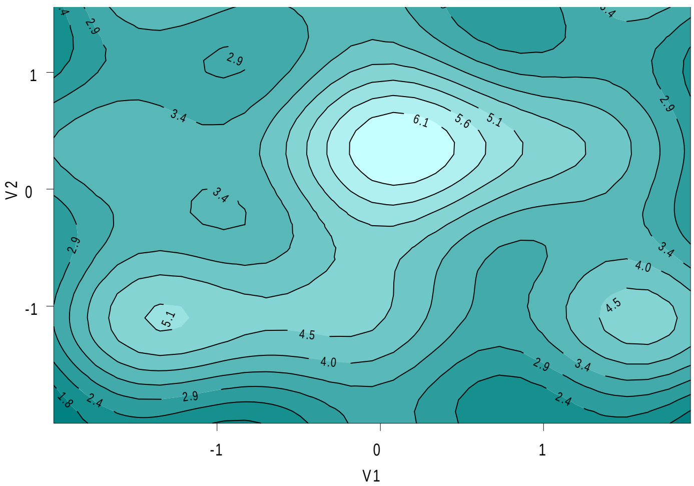


Figure 3.50: *Filled contour plot of the* `exsurf` *data.*

4. Click the **Color Scale Legend** button on the **Graph** toolbar to add a legend.

Dynamic Graphics

With a scatterplot matrix and a 3D scatter plot, you can generate interactive dynamic graphics. With them, you can view a matrix plot of the data, select and label groups of points, and rotate the data interactively, to obtain dynamic views of your multidimensional data set.

The Sliced Ball Data

We will demonstrate how to use Spotfire S+'s dynamic graphics using the sample data set `sliced.ball`, a three-dimensional data set representing points within a sphere. It contains structure that is not apparent in a scatterplot matrix.

1. Use the **Select Data** dialog to display the `sliced.ball` data in a **Data** window.

2. Examine the data. Do you see anything unusual?

3. Create a scatterplot matrix of the data. Again, do you see anything unusual, any clear patterns or other distinguishing features? Most people will see nothing unusual–the data seem to be a cloud of random data points.
4. Now create a 3D scatter plot of the data.

Selecting Data Points

1. Click the **Select Data Points** button on the **Graph Tools** palette.
2. Click and drag the pointer over some of the points in the 3D scatter plot. A rectangular "lasso" appears as you drag. When you release the mouse button, all the points inside the lasso are highlighted.
3. Now click on the title bar of the scatterplot matrix **Graph Sheet** to bring it into focus. Notice that the points you just highlighted in the 3D scatter plot are also highlighted in each of the matrix panels.
4. Click and drag the pointer to lasso an empty section in a scatterplot matrix panel. The highlighting for the previously selected points is turned off.
5. Experiment with the **Select Data Points** tool by selecting and deselecting points.

It will be hard to find any kind of meaningful pattern in these data using brushing. For some other data sets, brushing can be a very useful exploratory data analysis tool.

Spinning Data

Now let's examine the 3D scatter plot. Here we can rotate the data interactively. This allows us to view the data from a variety of angles and thus may help us to understand the data better.

1. Click an empty space within the graph region to select the 3D workbox. Four green circles and a green triangle appear. (If only a solitary green knob appears, you have clicked on the plot rather than the workbox–try again.)
2. Now rotate the point cloud by dragging any of the circles (for rotation about the vertical axis) or the triangle (for rotation about the horizontal axis parallel to the screen). Examine the

cloud as you rotate it. After a few rotations, you will start to notice something. As shown in Figure 3.51, there is a slice of data missing in this seemingly random point cloud!

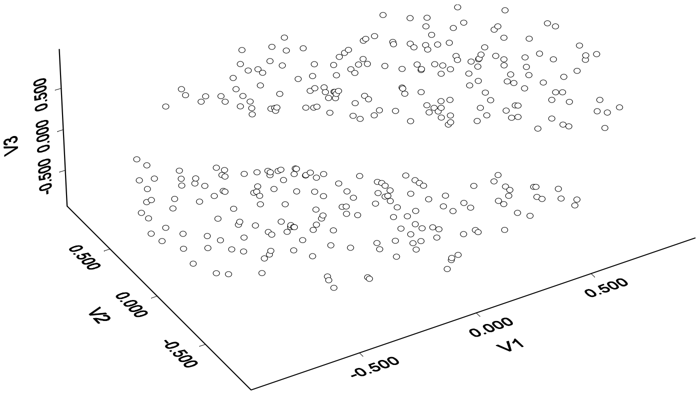


Figure 3.51: *The* `sliced.ball` *data set rotated to reveal missing points.*

Viewing the points in three dimensions allows you to discover structure not apparent in any of the two-variable plots.

CREATING PLOTS

4

INTRODUCTION

You probably need to create graphics for a variety of purposes–some "quick-and-dirty" for your own use in visually exploring your data or evaluating a model, some for sharing informally with colleagues, and some highly refined for publication in journals or marketing materials. Spotfire S+ offers a tremendous variety of plot types for all these uses. In this chapter, we present a pictorial overview of all the various plots you can create.

The Plot Palettes

The **Plots 2D**, **Plots 3D**, and **Extra Plots** palettes contain buttons for quickly creating plots. (See Figure 4.1 below.) To create a plot, simply select your data columns, either through the **Data** window or the **Object Explorer**, and then click a palette button.

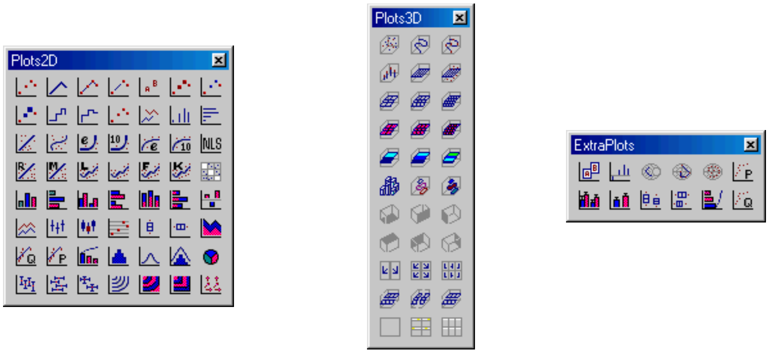
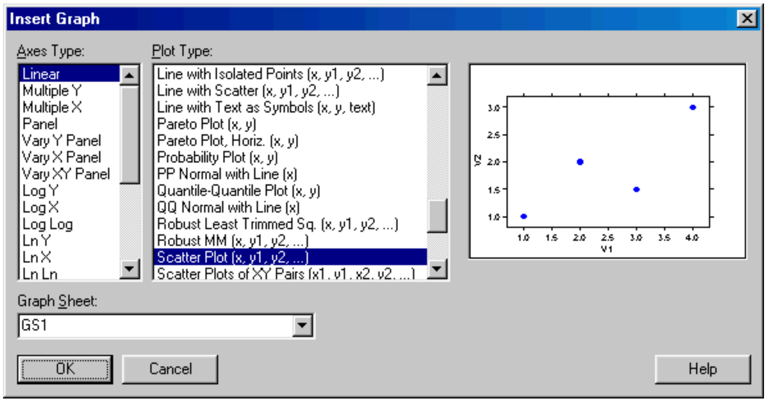


Figure 4.1: *The **Plots 2D**, **Plots 3D**, and **Extra Plots** palettes.*

The distinction between the 2D and 3D palettes is whether plots are created with two axes or three. Many 2D plots, such as scatterplot matrices, bubble color plots, and contour plots, can show data representing more than two dimensions. In this chapter, we organize the plots primarily by the dimensionality of the data.

The Insert Graph Dialog

You can also create any plot type by selecting it in the **Insert Graph** dialog, as shown in Figure 4.2.



Insert Graph

Axes Type: Linear

Plot Type: Scatter Plot (x, y1, y2, ...)

Graph Sheet: GS1

Linear
Multiple Y
Multiple X
Panel
Vary Y Panel
Vary X Panel
Vary XY Panel
Log Y
Log X
Log Log
Ln Y
Ln X
Ln Ln
Line with Isolated Points (x, y1, y2, ...)
Line with Scatter (x, y1, y2, ...)
Line with Text as Symbols (x, y, text)
Pareto Plot (x, y)
Pareto Plot, Horiz. (x, y)
Probability Plot (x, y)
PP Normal with Line (x)
Quantile-Quantile Plot (x, y)
QQ Normal with Line (x)
Robust Least Trimmed Sq. (x, y1, y2, ...)
Robust MM (x, y1, y2, ...)
Scatter Plot (x, y1, y2, ...)
Scatter Plots of XY Pairs (x1, y1, x2, y2, ...)
V2
1.0
1.5
2.0
2.5
3.0
V1
OK
Cancel
Help

Figure 4.2: *The **Insert Graph** dialog.*

To open the **Insert Graph** dialog, do one of the following:

- From the main menu, choose **Graph** and select a graph type–**2D Plot**, **3D Plot**, or **Multipanel Graph**.
- With a **Data** window open, choose **Insert** ▶ **Graph** from the main menu.

Plot Properties Dialogs

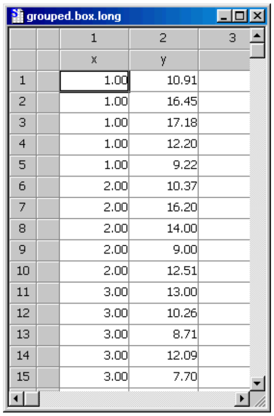
Double-clicking an existing plot, or creating a plot through the **Insert Graph** dialog without first selecting your data, opens a plot properties dialog specific to a particular group of plots. You can use these dialogs to create or modify your plots. For a complete discussion of the plot properties dialogs, see the online help.

Structuring Your Data to Plot

Because some plot types require data to be structured in a particular way, in the sections that follow, a sample data set is shown for each of the various plot types. For many plots, however, the data can be formatted in a number of different ways.

For example, data for creating grouped box plots may be structured in one of two ways: as long form stacked data or as multiple *y* form data. Whichever form your data are in, the same grouped box plot is produced.

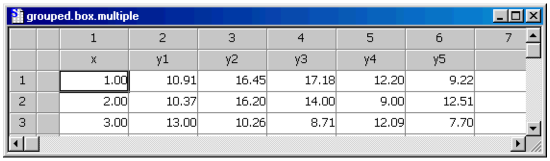
In long form stacked data (see Figure 4.3), the *x* column is a column of integers that assigns each *y* value to a group and determines the placement of the boxes along the *x*-axis. When your data are structured in this way, you simply select the x and y columns to create the grouped box plot.



	1	2	3
	x	y	
1	1.00	10.91	
2	1.00	16.45	
3	1.00	17.18	
4	1.00	12.20	
5	1.00	9.22	
6	2.00	10.37	
7	2.00	16.20	
8	2.00	14.00	
9	2.00	9.00	
10	2.00	12.51	
11	3.00	13.00	
12	3.00	10.26	
13	3.00	8.71	
14	3.00	12.09	
15	3.00	7.70	

Figure 4.3: *Long form stacked data for creating a grouped box plot.*

In multiple *y* form data (see Figure 4.4), the *x* column determines the grouping levels of the data in two or more *y* columns. When your data are structured in this way, you select the x, y1, y2, y3, y4, and y5 columns to create the grouped box plot.



	1	2	3	4	5	6	7
	x	y1	y2	y3	y4	y5	
1	1.00	10.91	16.45	17.18	12.20	9.22	
2	2.00	10.37	16.20	14.00	9.00	12.51	
3	3.00	13.00	10.26	8.71	12.09	7.70	

Figure 4.4: *Multiple y form data for creating a grouped box plot.*

For insight into the data structure appropriate for any given plot type, open the **Insert Graph** dialog (refer to Figure 4.2). Following each plot type is a parenthetical listing of the various ways in which your data may be structured to produce that particular plot.

PLOTTING ONE-DIMENSIONAL DATA

Box Plots

A box plot displays the locations of the basic features of the distribution of one-dimensional data–the median, the upper and lower quartiles, outer fences that indicate the extent of your data beyond the quartiles, and outliers, if any.

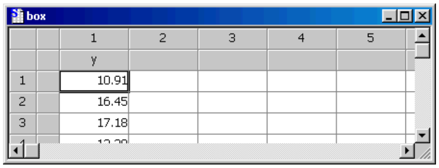
A box plot allows you to quickly grasp the location, scale (width), and rough shape of the distribution of your data. For example, if the upper and lower quartiles of the box plot are about the same distance from the median, then the distribution of your data is approximately symmetric in the middle. The median is represented by a horizontal line segment within the rectangle, and the top and bottom areas of the rectangle portray the upper and lower quartiles.

There are two types of box plots: single and grouped. (Grouped box plots are discussed later in this chapter.) A single box plot consists of a box plot describing one column of data.

To create a vertical box plot for a single set of data:

1. Select the y column.

2. Click the ⊟ button on the **Plots 2D** palette.

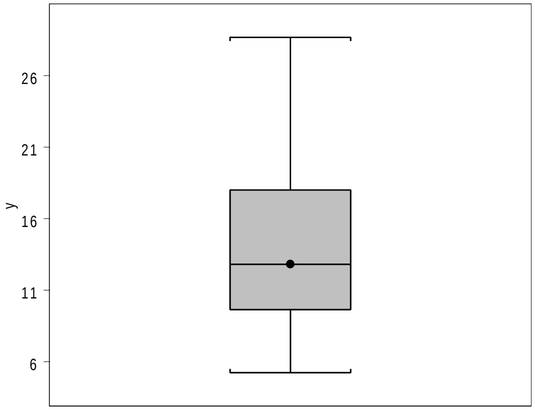


box

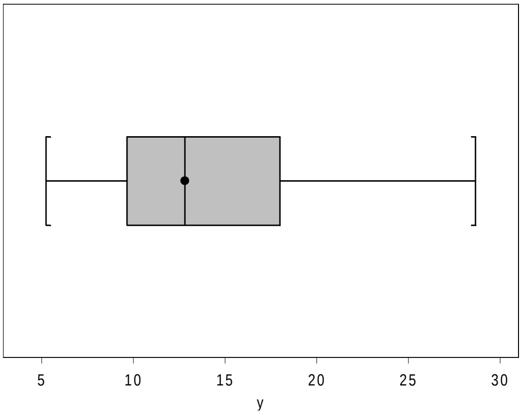
	1	2	3	4	5
	y				
1	10.91				
2	16.45				
3	17.18				

To create a horizontal box plot, click the ⊡ button instead.

Vertical box plot ⊟



Horizontal box plot ⊡



QQ Plots

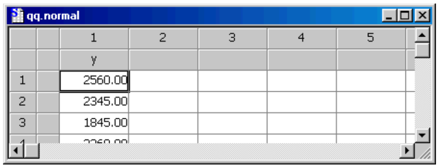
A quantile-quantile plot, or QQ plot for short, is useful for comparing your data with another set of data or with the quantiles of a distribution function that you conjecture is a good model for your data. In the latter case, the plot shows the ordered data values along the vertical axis versus the corresponding quantiles of the distribution function you specify along the horizontal axis. You interpret the plot in a very simple way:

- If the points fall close to a straight line, your conjectured distribution is a reasonably good model for your data.
- If the points do not fall close to a straight line, your conjectured distribution is not a good model, and you need to look for an alternative distribution that is a better model.

The QQ normal with line plot is intended for comparing a single set of data with the quantiles of a distribution function (by default, the normal distribution). The QQ plot is intended for comparing two sets of data and does not automatically display a distribution line.

To create a QQ normal with line plot for a single set of data:

1. Select the `y` column.
2. Click the Q button on the **Plots 2D** palette.

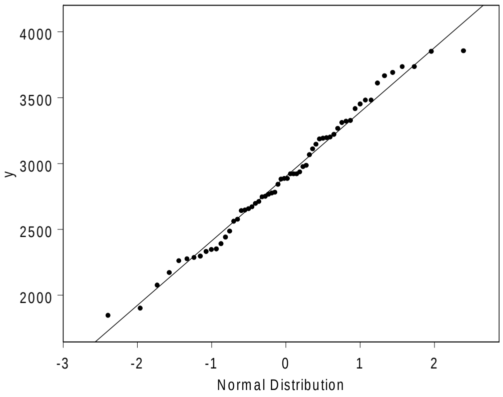


qq.normal

	1	2	3	4	5
	y				
1	2560.00				
2	2345.00				
3	1845.00				

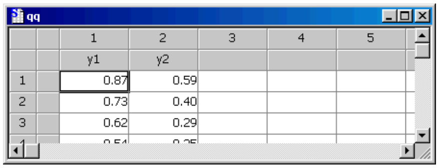
To create the same plot without the distribution line, click the button on the **Extra Plots** palette.

QQ normal with line plot



To create a QQ plot comparing two sets of data:

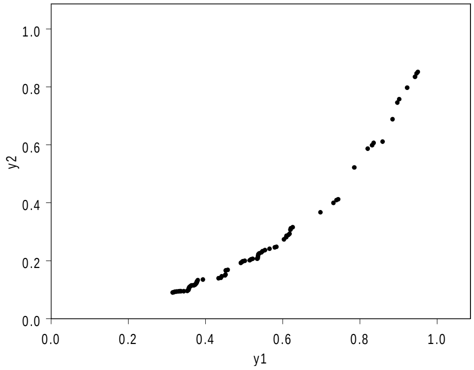
1. Select the y1 and y2 columns to plot y2 against y1.



		1	2	3	4	5
		y1	y2			
1		0.87	0.59			
2		0.73	0.40			
3		0.62	0.29			

2. Click the button on the **Extra Plots** palette.

QQ plot



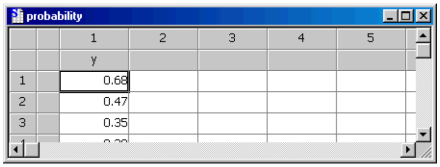
Probability Plots

A probability plot is similar to a QQ plot except that it compares your data with the quantiles of a cumulative probability distribution function. Probability plots can be created with or without a distribution line.

To create a probability plot with a distribution line for a single set of data:

1. Select the y column.

2. Click the P button on the **Plots 2D** palette.

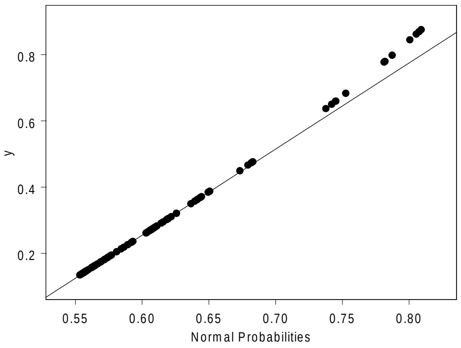


probability

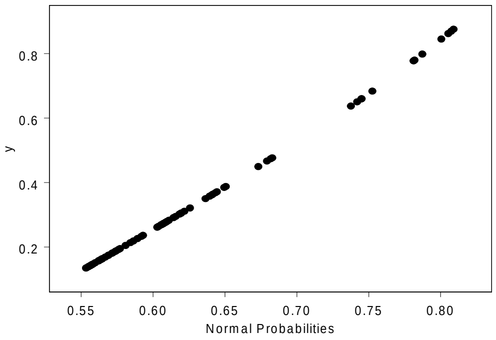
	1	2	3	4	5
	y				
1	0.68				
2	0.47				
3	0.35				

To create the same plot without the distribution line, click the P button on the **Extra Plots** palette.

Probability normal with line plot P



Probability plot P

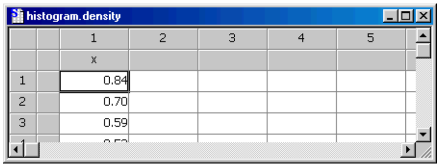


Histogram/ Density Plots

A histogram displays a set of rectangular bars. The width of each bar represents a range of values, and the height of the bar represents the counts of observations that fall within a given range. A nonparametric density estimate is an estimate of the probability density function (or density, for short) of your data that does not assume any parametric form for the density, such as a normal density with mean parameter μ and variance parameter σ^2.

You can think of a nonparametric density estimate as a smooth alternative to a histogram, with the shape of the density estimate being similar to that of the histogram. Histogram/density plots are powerful visualization tools without the considerable data reduction produced by a box plot.

To create any of the histogram/density plots for a single set of data, select the x column. Then:



histogram.density

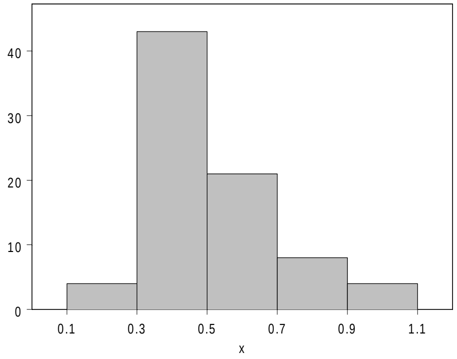
	1	2	3	4	5
	x				
1	0.84				
2	0.70				
3	0.59				

- To create a histogram, click the button on the **Plots 2D** palette.

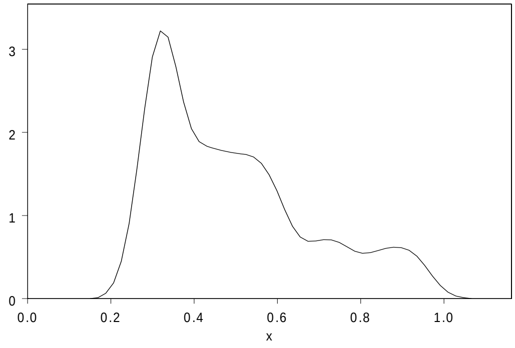
- To create a density plot, click the button on the **Plots 2D** palette.

- To create a histogram/density plot, click the button on the **Plots 2D** palette.

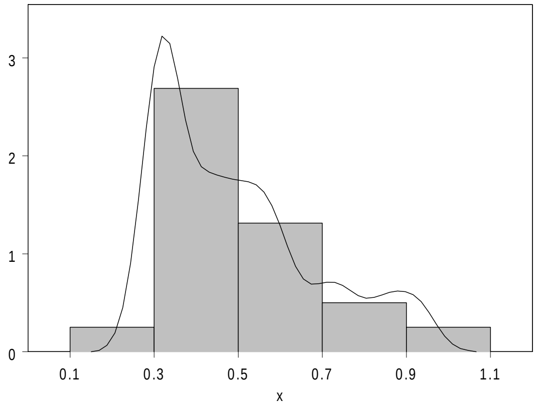
Histogram



Density plot



Histogram/density plot



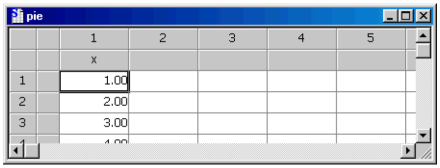
Pie Charts

A pie chart shows the share of individual values in a column relative to the column sum.

To create a pie chart:

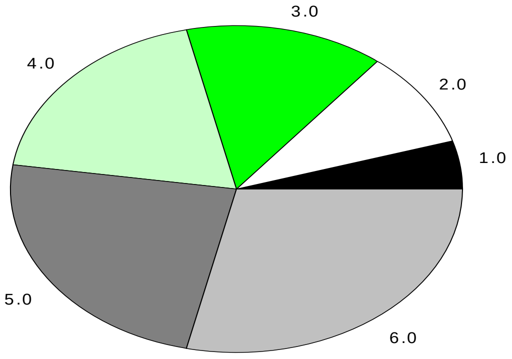
1. Select the x column.

2. Click the button on the **Plots 2D** palette.



	1	2	3	4	5
	x				
1	1.00				
2	2.00				
3	3.00				

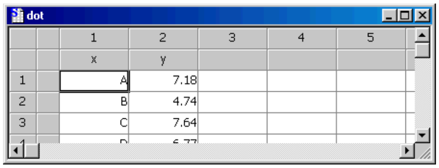
Pie chart



Dot Plots

A dot plot plots independent data against categorical dependent data using gridlines to mark the dependent levels.

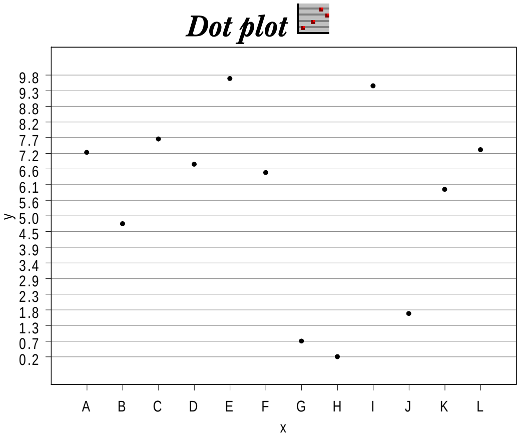
To create a dot plot:



	1	2	3	4	5
	x	y			
1	A	7.18			
2	B	4.74			
3	C	7.64			

1. Either select a single x column to plot its values along the horizontal axis against an integer sequence along the vertical, or select both x, the categorical data, and y to plot y against x.

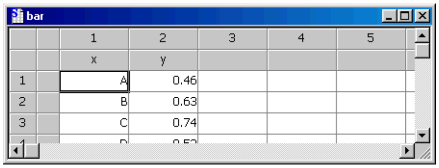
2. Click the button on the **Plots 2D** palette.



Bar Plots

A bar plot displays a bar of a height (or width, for a horizontal bar plot) determined by its corresponding data value. A bar plot with error displays an error bar on top (or at the end) of each bar.

To create a vertical bar (with base at Y min) plot:



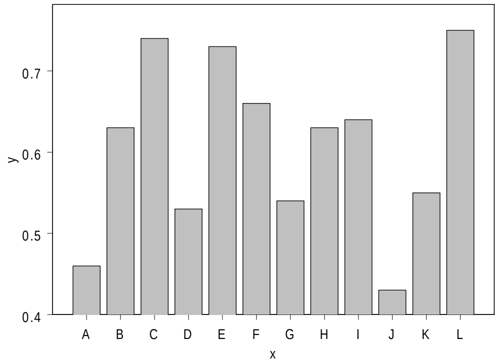
	1	2	3	4	5
	x	y			
1	A	0.46			
2	B	0.63			
3	C	0.74			

1. Either select a single column to create a bar plot of its values using an integer sequence to label the bars, or select both x and y to create a bar plot of y using the x data to label the bars.

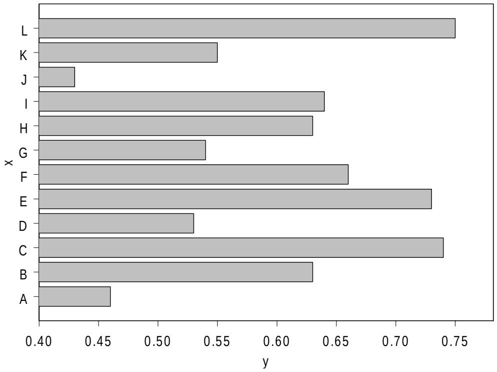
2. Click the button on the **Plots 2D** palette. (If any of the values in the column is negative, click the button instead.)

To create a horizontal bar plot, select the columns in reverse order and click the 📊 button.

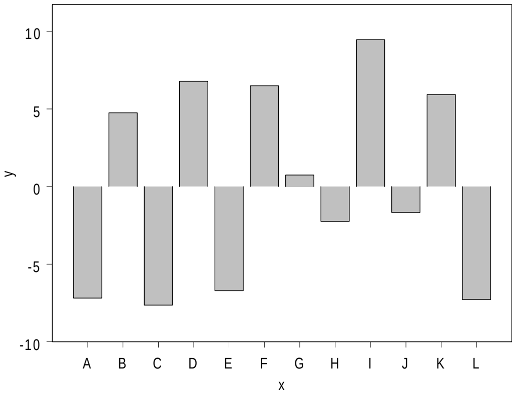
Vertical bar with base at Y min plot 📊



Horizontal bar plot 📊



Bar with base at zero plot 📊

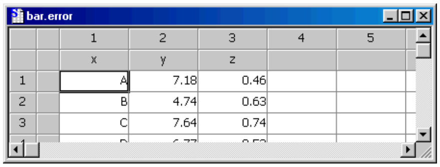


If your data set contains a z column of error values, you can create a bar plot of y using the z data for the error bars.

To create a bar with error plot:

1. Select the x, y, and z columns.

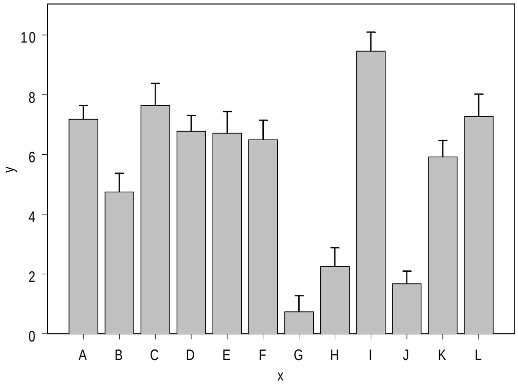
2. Click the 📊 button on the **Extra Plots** palette.



	1	2	3	4	5
	x	y	z		
1	A	7.18	0.46		
2	B	4.74	0.63		
3	C	7.64	0.74		

For data arranged in multiple *y* columns, Spotfire S+ automatically calculates and displays error bars. See the online help for details.

Bar with error plot

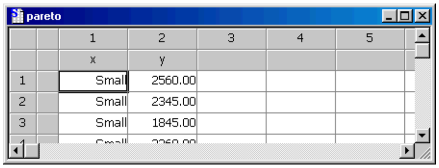


Pareto Plots

A Pareto plot is a bar plot sorted on the dependent variable combined with a line plot displaying cumulative percentages of the categories (bars). A histogram of descending percentages of each category is plotted with a line plot displaying cumulative percentages. A Pareto plot essentially combines the properties of a bar plot and a line plot.

To create a vertical Pareto plot:

1. Select an x column of categorical data and a y column of values.

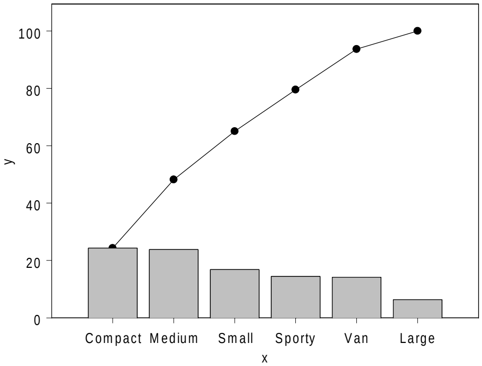


	1	2	3	4	5
	x	y			
1	Small	2560.00			
2	Small	2345.00			
3	Small	1845.00			

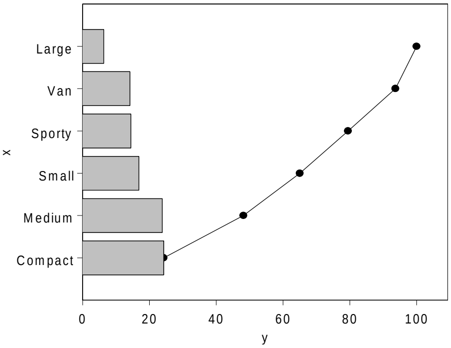
2. Click the button on the **Plots 2D** palette.

To create a horizontal Pareto plot, select the columns in reverse order and click the button on the **Extra Plots** palette.

Vertical Pareto plot



Horizontal Pareto plot

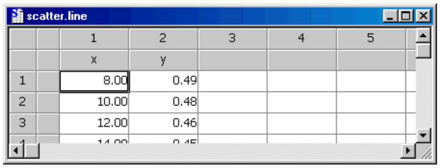


PLOTTING TWO-DIMENSIONAL DATA

Scatter and Line Plots

Scatter and line plots are the most basic kinds of plots for displaying data. You can use them to plot a single column of data or to plot one data column against another.

To create any of the scatter/ line plots:

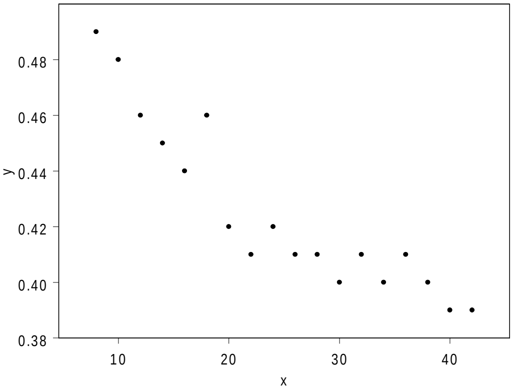


scatter.line

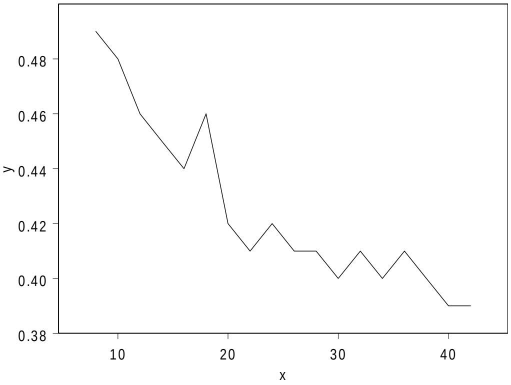
	1	2	3	4	5
	x	y			
1	8.00	0.49			
2	10.00	0.48			
3	12.00	0.46			

1. Select either the x or y column to plot its values along the vertical axis against an integer sequence along the horizontal, or select both x and y to plot y against x.
2. Click the **Plots 2D** palette button corresponding to the desired plot. (To create the high density line–Y zero plot, click the button on the **Extra Plots** palette.)

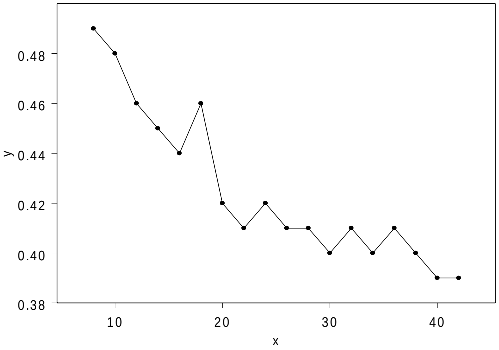
Scatter plot



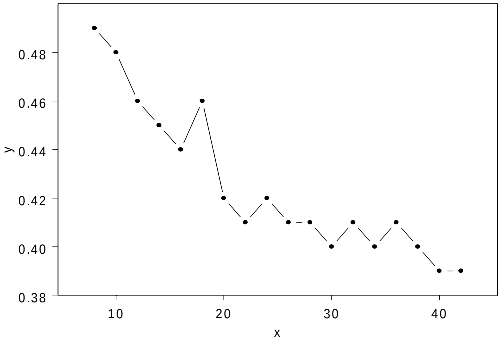
Line plot



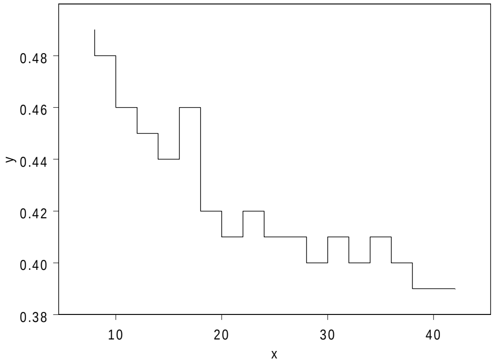
Line with scatter plot



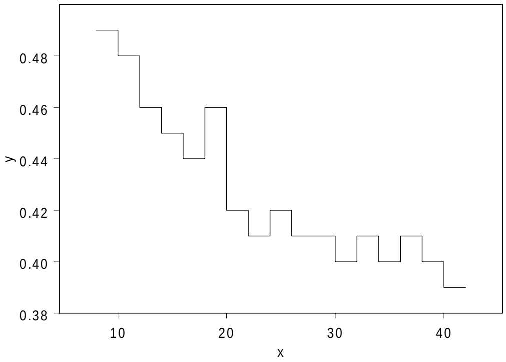
Line with isolated points plot



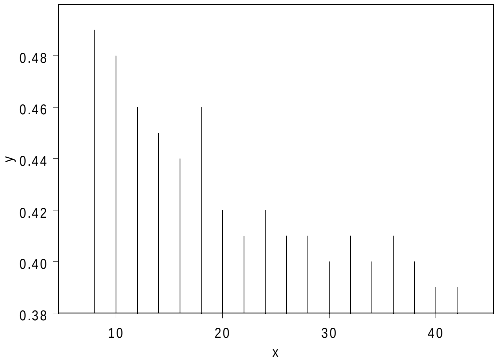
Vertical step plot



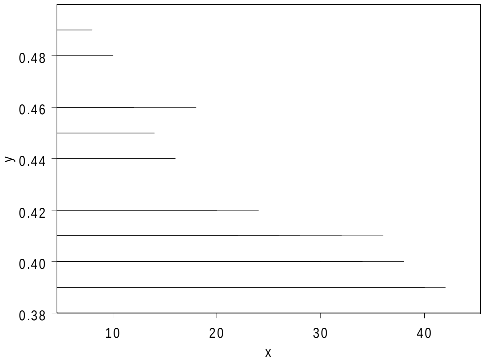
Horizontal step plot



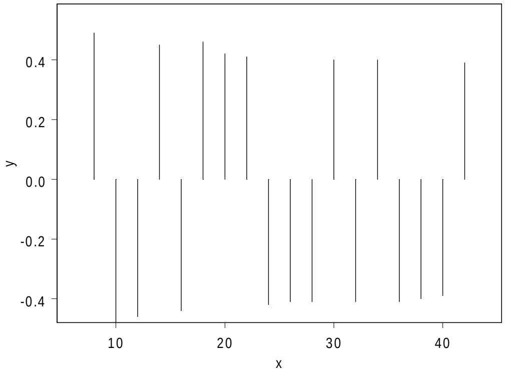
Vertical high density line plot



Horizontal high density line plot



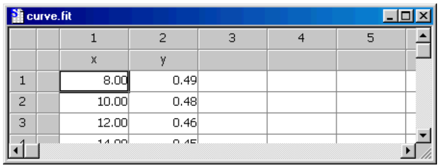
High density line–Y zero plot



Curve-Fitting Plots

A curve-fitting plot displays a regression line with a scatter plot of the associated data points. Regression lines are generated using an ordinary least-squares analysis to calculate *y* values for given values of *x*, using a transformed model where appropriate.

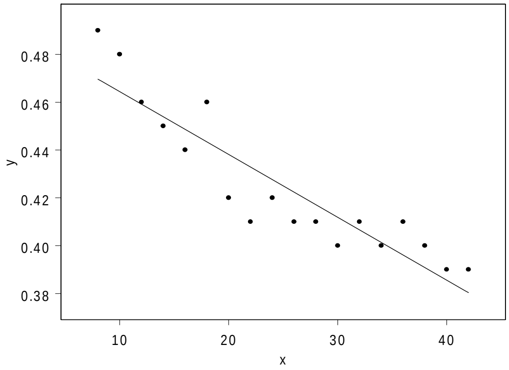
To create any of the curve-fitting plots:



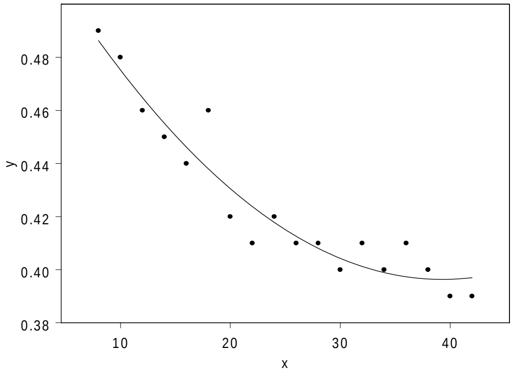
	1	2	3	4	5
	x	y			
1	8.00	0.49			
2	10.00	0.48			
3	12.00	0.46			

1. Select the x and y columns.
2. Click the **Plots 2D** palette button corresponding to the desired plot.

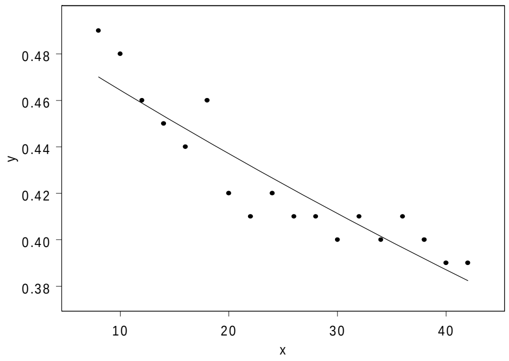
Linear least squares curve-fitting plot



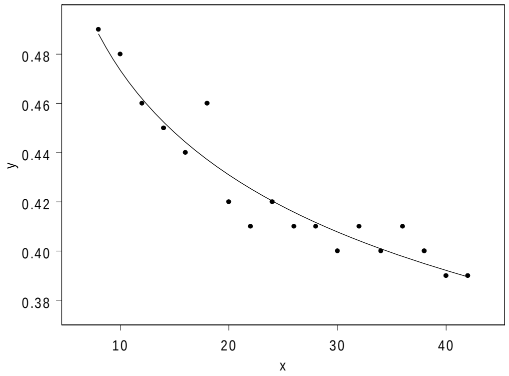
Polynomial curve-fitting plot



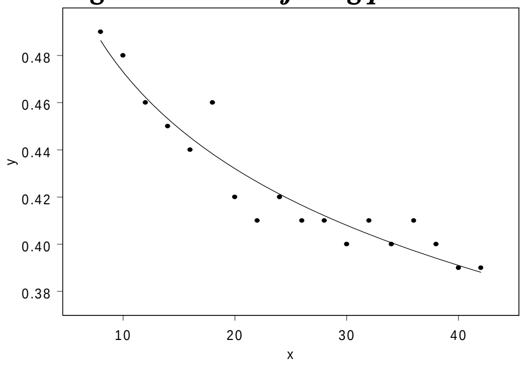
Exponential curve-fitting plot



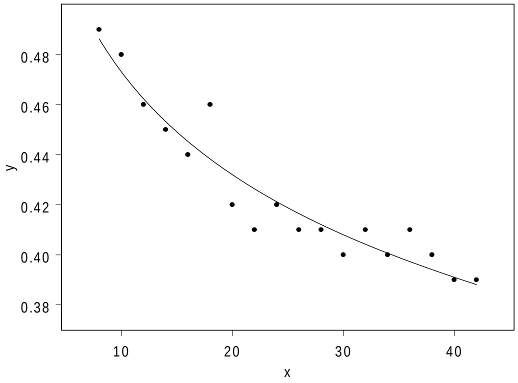
Power curve-fitting plot



Log base 10 curve-fitting plot



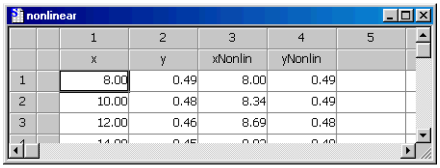
Log base e curve-fitting plot



Nonlinear Curve-Fitting Plots

Nonlinear curve fitting fits a user-defined model to a set of data points. Because you must specify a model and initial values for every parameter in the model, simply selecting your data and clicking the plot button does not automatically generate the plot. Instead, a new **Graph Sheet** is opened with a plot icon in the upper left-hand corner. To generate the plot, double-click the plot icon to open the **Nonlinear Curve Fitting** dialog and specify the required information in the appropriate fields. For detailed information on producing this type of plot, see the online help.

To create an NLS plot:



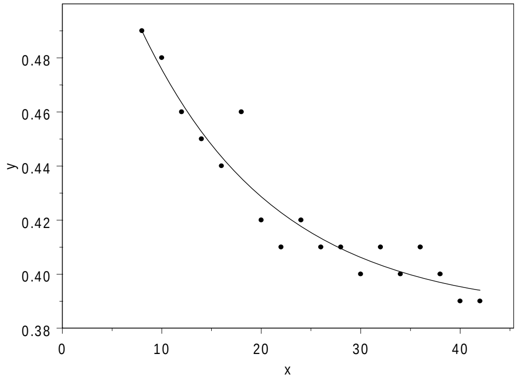
nonlinear

	1	2	3	4	5
	x	y	xNonlin	yNonlin	
1	8.00	0.49	8.00	0.49	
2	10.00	0.48	8.34	0.49	
3	12.00	0.46	8.69	0.48	

1. Select the x column as the independent variable and the y column as the dependent variable.

2. Click the NLS button on the Plots 2D palette. See the online help.

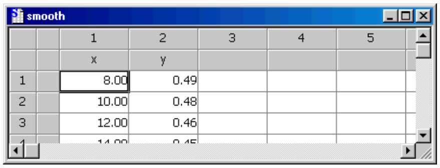
Nonlinear least squares curve-fitting plot NLS



Smoothing Plots

Scatterplot smoothers are useful for fitting arbitrary smooth functions to a scatter plot of data points.

To create any of the smoothing plots:



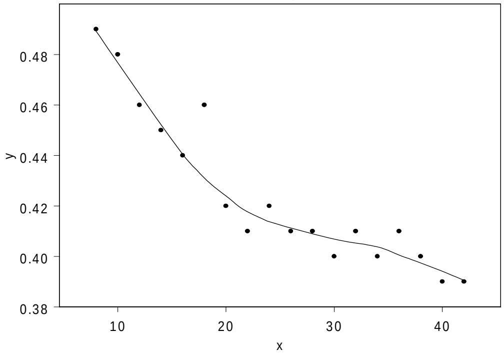
smooth

	1	2	3	4	5
	x	y			
1	8.00	0.49			
2	10.00	0.48			
3	12.00	0.46			

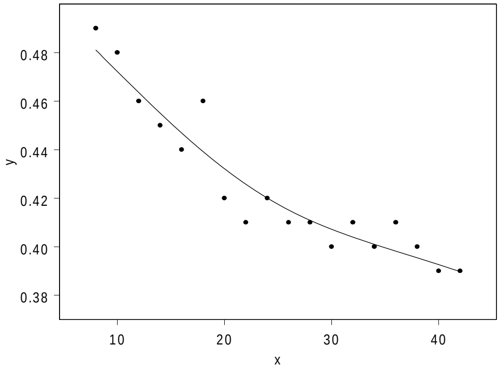
1. Select the x and y columns.

2. Click the **Plots 2D** palette button corresponding to the desired plot.

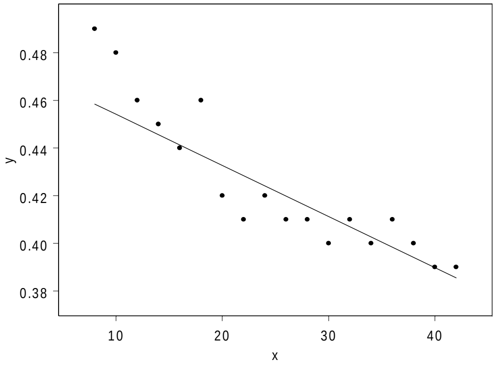
Loess smoothing plot



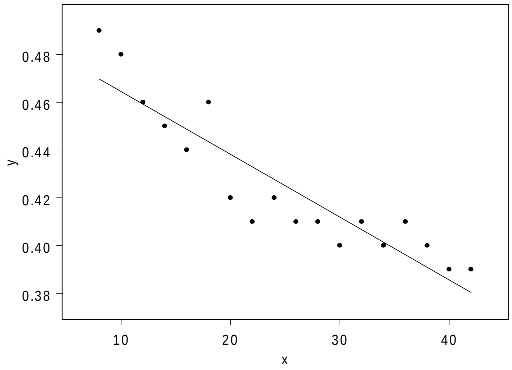
Spline smoothing plot



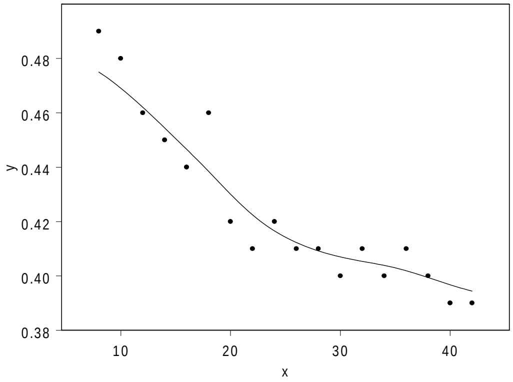
Robust LTS smoothing plot



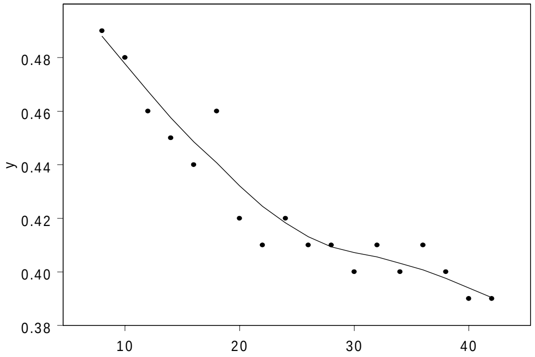
Robust MM smoothing plot



Kernel smoothing plot



Friedman super smoothing plot

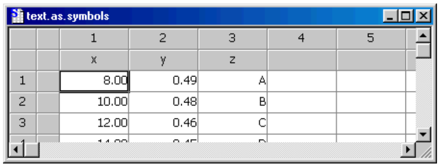


Text as Symbols Plots

A text as symbols plot is just a special kind of line/scatter plot, with text strings used as plotting symbols.

To create the text as symbols plot:

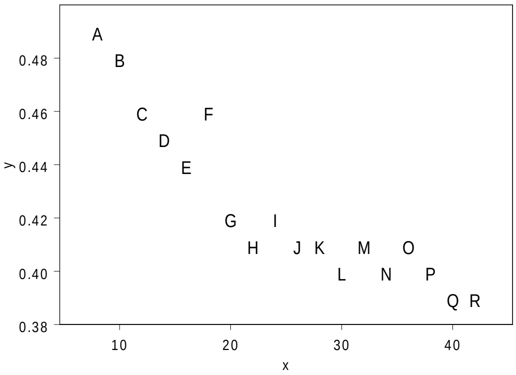
1. Select the x, y, and z columns, with the z column text used as the plotting symbols.



	1	2	3	4	5
	x	y	z		
1	8.00	0.49	A		
2	10.00	0.48	B		
3	12.00	0.46	C		

2. Click the button on the **Plots 2D** palette.

Text as symbols plot

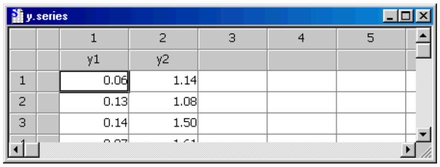


Y Series Plots

A Y series plot is just a special kind of line plot that plots multiple series on the same graph. The data are plotted along the vertical axis against a common, automatically-generated integer sequence along the horizontal. You can replace the integer sequence with more appropriate labels, such as times or dates, by using the **X Axis Labels** dialog. For details, see the online help.

To create a Y series plot:

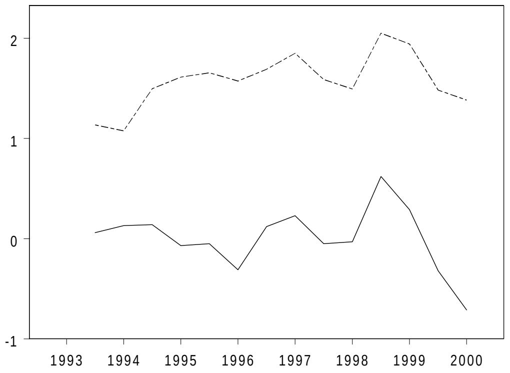
1. Select the y1 and y2 columns.



	1	2	3	4	5
	y1	y2			
1	0.06	1.14			
2	0.13	1.08			
3	0.14	1.50			

2. Click the button on the **Plots 2D** palette.

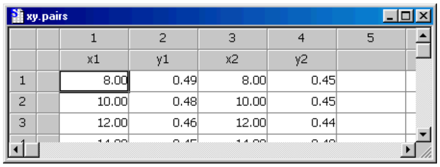
Y series plot



XY Pairs Line Plots

An XY pairs line plot lets you plot multiple sets of *x* and *y* pairs on a common set of axes.

To create an XY pairs line plot:

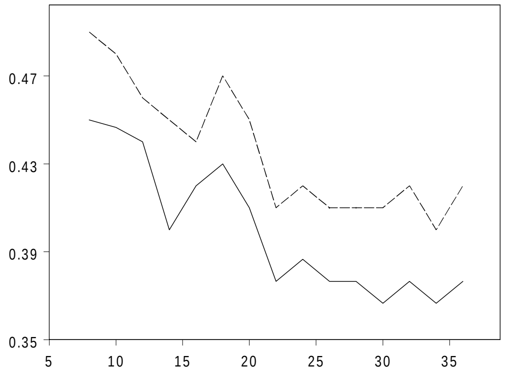


	1	2	3	4	5
	x1	y1	x2	y2	
1	8.00	0.49	8.00	0.45	
2	10.00	0.48	10.00	0.45	
3	12.00	0.46	12.00	0.44	

1. Select the `x1`, `y1`, `x2`, and `y2` columns.

2. Click the button on the **Plots 2D** palette.

XY pairs line plot



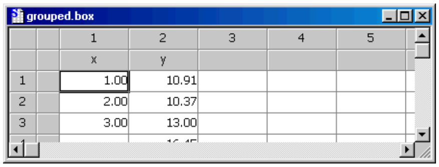
Grouped Box Plots

A grouped box plot consists of side-by-side box plots describing multiple columns of data. The number of rows in the *x* column determines the number of boxes, and the number of rows in the *y* column must be evenly divisible by the number of rows in *x*.

To create a vertical grouped box plot:

1. Select the x and y columns.

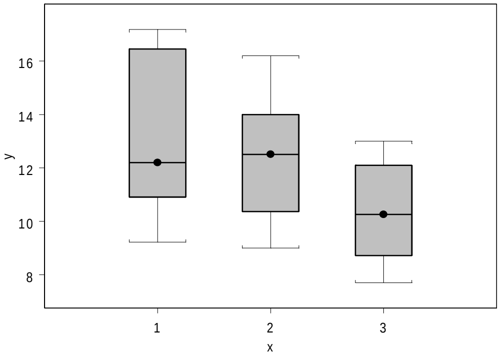
2. Click the button on the **Extra Plots** palette.



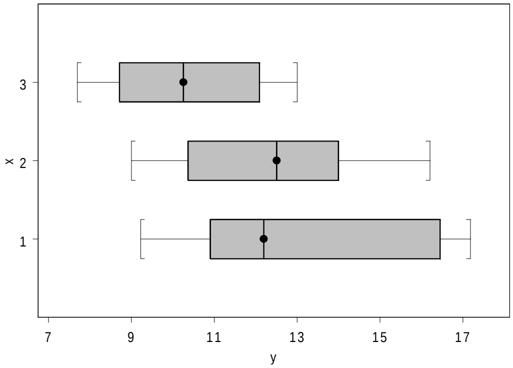
	1	2	3	4	5
	x	y			
1	1.00	10.91			
2	2.00	10.37			
3	3.00	13.00			

To create a horizontal grouped box plot, click the button instead.

Vertical grouped box plot



Horizontal grouped box plot



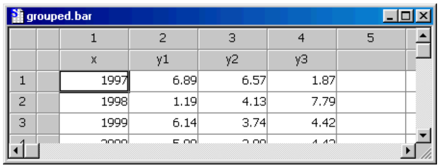
Grouped Bar Plots

A grouped bar plot displays data as clusters of bars. The *x* values are the labels. Multiple *y* columns determine the bar heights; that is, the height of the first bar in each group is determined by the values in the first *y* column, the height of the second bar in each group by the values in the second *y* column, etc.

To create a vertical grouped bar plot:

1. Select the x and multiple y columns.

2. Click the button on the **Plots 2D** palette.



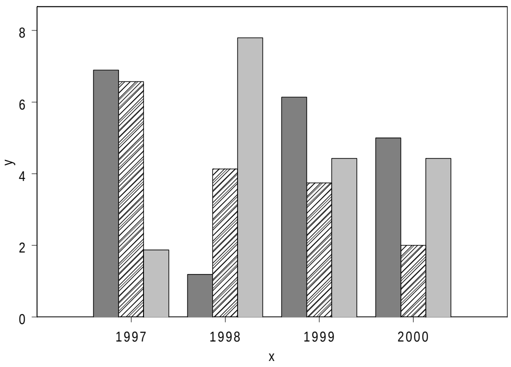
	1	2	3	4	5
	x	y1	y2	y3	
1	1997	6.89	6.57	1.87	
2	1998	1.19	4.13	7.79	
3	1999	6.14	3.74	4.42	

To create a horizontal grouped bar plot:

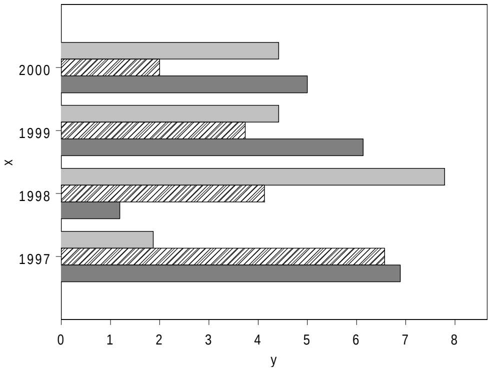
1. Select the multiple y columns first, then CTRL-click to select the x column last.

2. Click the button on the **Plots 2D** palette.

Vertical grouped bar plot



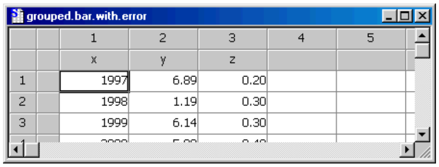
Horizontal grouped bar plot



To produce a grouped bar with error plot using a palette button, you must first stack all of your *y* data into a single column. Then create a *z* column of the same length containing the values to use for the error bars. Note that error bars cannot be automatically calculated for grouped bar plots.

To create a grouped bar with error plot:

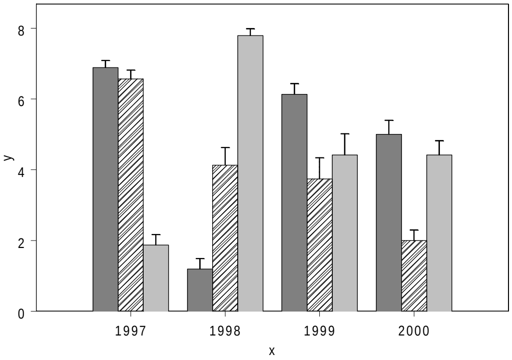
1. Select the x, y, and z columns.



		1	2	3	4	5
		x	y	z		
1		1997	6.89	0.20		
2		1998	1.19	0.30		
3		1999	6.14	0.30		
4		2000	5.00	0.40		

2. Click the button on the **Extra Plots** palette.

Grouped bar with error plot

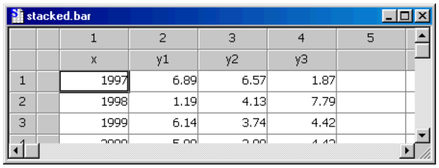


Stacked Bar Plots

A stacked bar plot displays data in stacks of bars. The *x* values are the labels. Multiple *y* columns determine the bar segment heights; that is, the height of the bottom segment in each stack is determined by the values in the first *y* column, the height of the middle segment in each stack by the values in the second *y* column, etc. Note that error bars cannot be displayed in stacked bar plots.

To create a vertical stacked bar plot:

1. Select the x and multiple y columns.



	1	2	3	4	5
	x	y1	y2	y3	
1	1997	6.89	6.57	1.87	
2	1998	1.19	4.13	7.79	
3	1999	6.14	3.74	4.42	

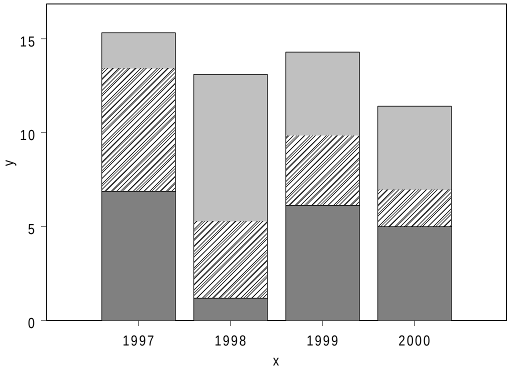
2. Click the button on the **Plots 2D** palette.

To create a horizontal stacked bar plot:

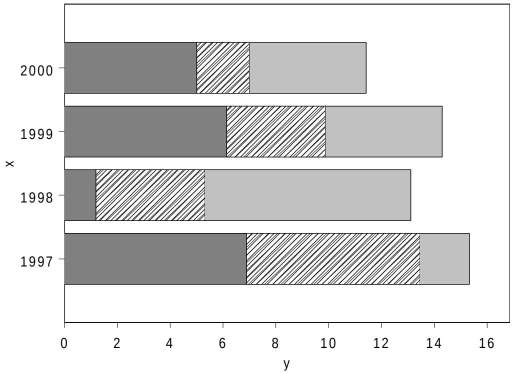
1. Select the multiple y columns first, then CTRL-click to select the x column last.

2. Click the button on the **Plots 2D** palette.

Vertical stacked bar plot



Horizontal stacked bar plot

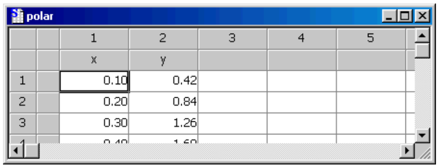


Polar Plots

A polar plot displays data in polar coordinates.

To create a polar scatter plot:

1. Select the x (radius values) and y (angle values) columns.

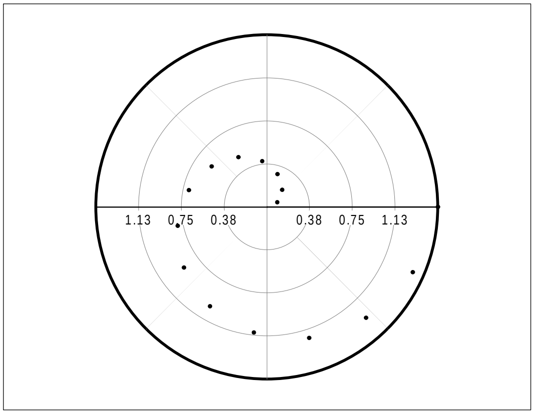

polar

	1	2	3	4	5
	x	y			
1	0.10	0.42			
2	0.20	0.84			
3	0.30	1.26			
4	0.40	1.68			

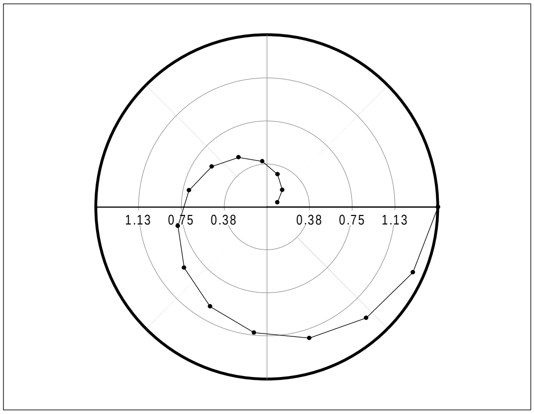
2. Click the button on the **Extra Plots** palette.

To create a polar line plot, click the button instead.

Polar scatter plot



Polar line plot



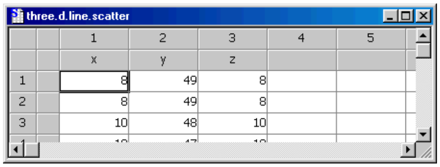
PLOTTING MULTIDIMENSIONAL DATA

3D Scatter and Line Plots

3D scatter and line plots display multidimensional data in three-dimensional space. 3D regression plots, which are just special kinds of 3D scatter and line plots, draw a regression plane through the data points.

To create any of the 3D scatter/line plots:

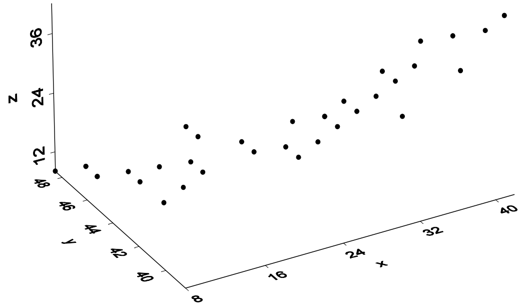
1. Select the x, y, and z columns.
2. Click the **Plots 3D** palette button corresponding to the desired plot.



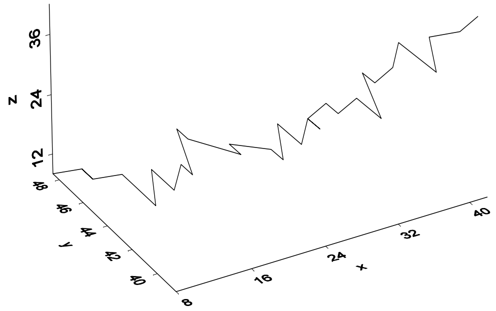
three.d.line.scatter

	1	2	3	4	5
	x	y	z		
1	8	49	8		
2	8	49	8		
3	10	48	10		

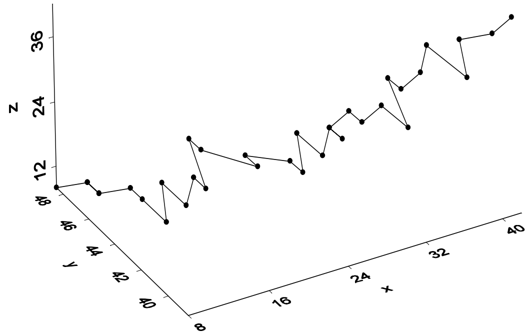
3D scatter plot



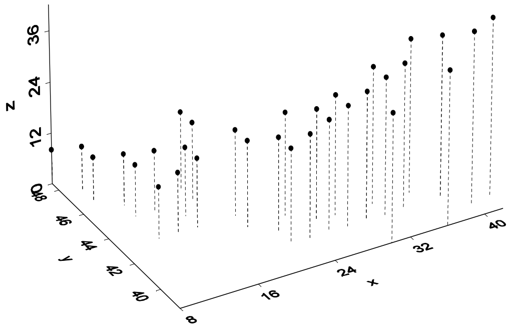
3D line plot



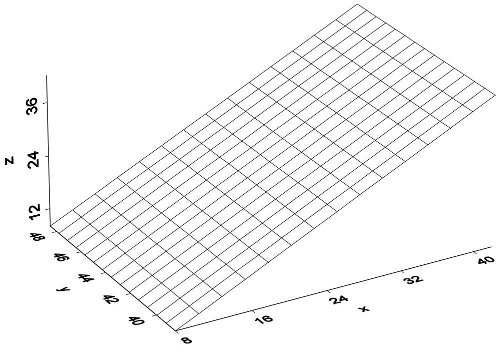
3D line with scatter plot



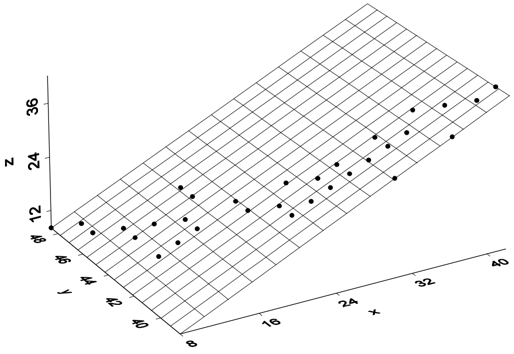
3D scatter with drop line plot



3D regression plot



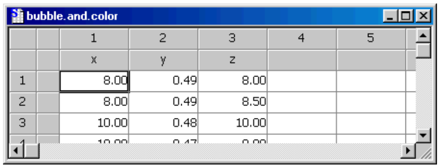
3D regression with scatter plot



Bubble and Color Plots

Bubble and color plots are scatter plots that let you represent an additional dimension by varying the size or color of the plotting symbol.

To create a scatter plot of y against x with the z data represented as bubbles of varying size (bubble plot) or bubbles of varying color (color plot):



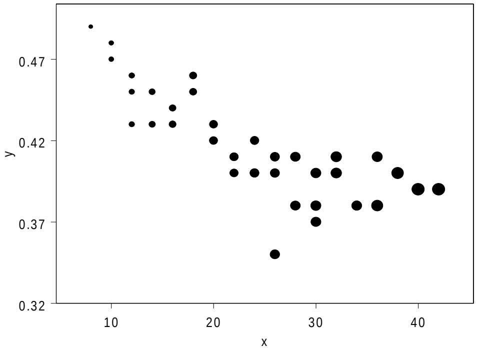
bubble.and.color

		1	2	3	4	5
		x	y	z		
1		8.00	0.49	8.00		
2		8.00	0.49	8.50		
3		10.00	0.48	10.00		
4		10.00	0.47	9.00		

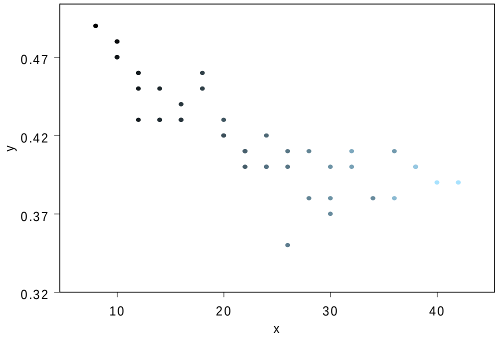
1. Select the x, y, and z columns.
2. For a bubble plot, click the button on the **Plots 2D** palette.

   For a color plot, click the button.

Bubble plot



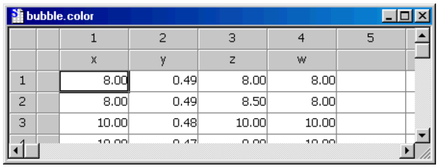
Color plot



Bubble Color Plots

A bubble color plot is just a combination of a bubble plot and a color plot.

To produce a scatter plot of y against x with the z data represented as bubbles of varying size and the w data represented as bubbles of varying color:

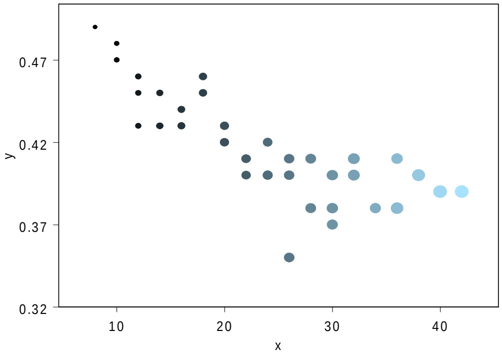


	1	2	3	4	5
	x	y	z	w	
1	8.00	0.49	8.00	8.00	
2	8.00	0.49	8.50	8.00	
3	10.00	0.48	10.00	10.00	
4	10.00	0.47	9.00	10.00	

1. Select the x, y, z, and w columns.

2. Click the button on the **Plots 2D** palette.

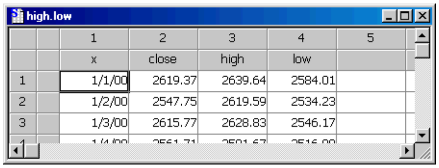
Bubble color plot



High-Low Plots

A high-low plot typically displays the daily, monthly, or yearly high and low values of a series, together with average or closing values, and perhaps opening values. Meaningful high-low plots can thus include from three to five columns of data. The first column selected, containing the *x* data, is used to label the *x*-axis. The final two columns represent the high and low data values. Average data, or open and close data, should be selected as the y or y and z columns, respectively.

To create a high-low-close or high-low-average plot:

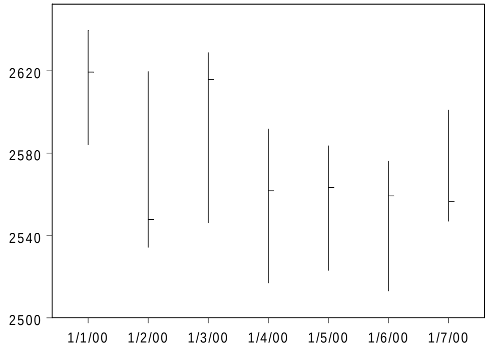


	1	2	3	4	5
	x	close	high	low	
1	1/1/00	2619.37	2639.64	2584.01	
2	1/2/00	2547.75	2619.59	2534.23	
3	1/3/00	2615.77	2628.83	2546.17	
4	1/4/00	2561.71	2591.67	2516.00	

1. Select the x, close or average, high, and low columns.

2. Click the button on the **Plots 2D** palette.

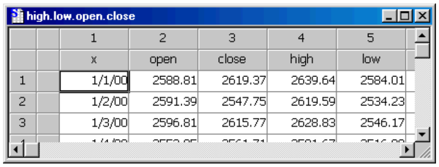
High-low plot



To create a high-low-open-close plot:

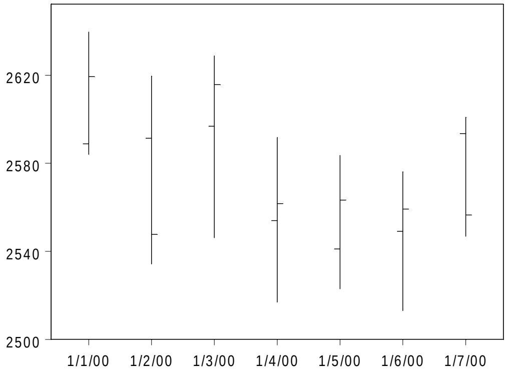
1. Select the `x`, `open`, `close`, `high`, and `low` data (in that order).

2. Click the button on the **Plots 2D** palette.



	1	2	3	4	5
	x	open	close	high	low
1	1/1/00	2588.81	2619.37	2639.64	2584.01
2	1/2/00	2591.39	2547.75	2619.59	2534.23
3	1/3/00	2596.81	2615.77	2628.83	2546.17

High-low-open-close plot

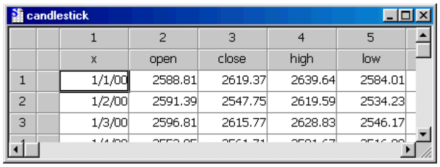


Candlestick Plots

A candlestick plot, a variation on the high-low-open-close plot, displays the difference between the open value and the close value as a filled rectangle. The color of the rectangle shows whether the difference is positive or negative.

To create a candlestick plot:

1. Select the `x`, `open`, `close`, `high`, and `low` data (in that order).

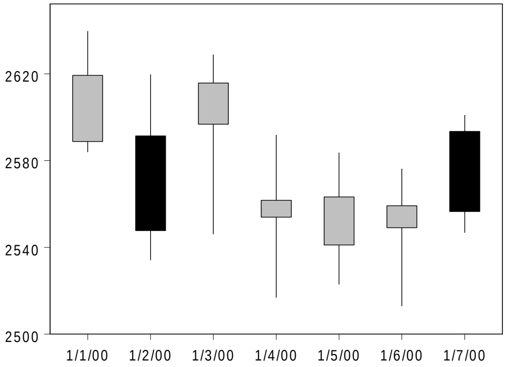


candlestick

		1	2	3	4	5
		x	open	close	high	low
1		1/1/00	2588.81	2619.37	2639.64	2584.01
2		1/2/00	2591.39	2547.75	2619.59	2534.23
3		1/3/00	2596.81	2615.77	2628.83	2546.17

2. Click the button on the **Plots 2D** palette.

Candlestick plot

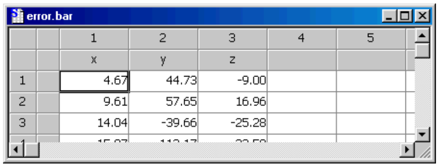


Error Bar Plots

An error bar plot displays a range of error around plotted data points. The *x* values determine the positions of the bars along the *x*-axis. If your data set contains an `x` column and multiple `y` columns, Spotfire S+ automatically calculates and displays error bars. See the online help for details.

To create a vertical error bar plot:

1. Select the `x`, `y`, and `z` columns to create an error bar plot of `y` using the `z` data to display error bars.



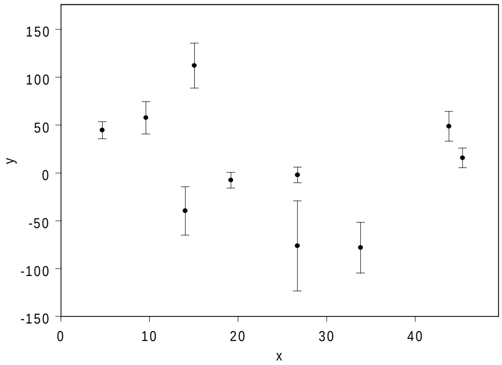
error.bar

		1	2	3	4	5
		x	y	z		
1		4.67	44.73	-9.00		
2		9.61	57.65	16.96		
3		14.04	-39.66	-25.28		

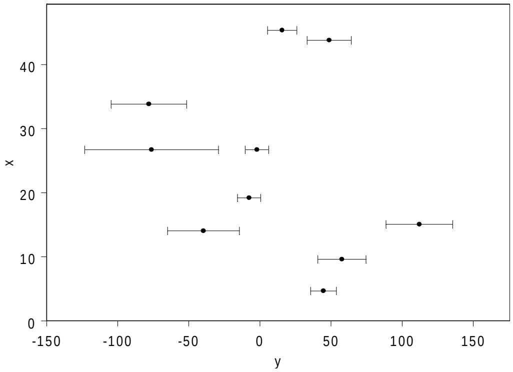
2. Click the button on the **Plots 2D** palette.

To create a horizontal error bar plot, select the `x` and `y` columns in reverse order and click the button.

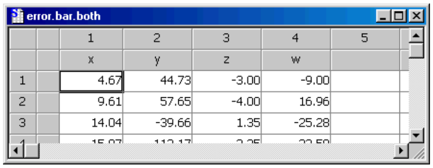
Vertical error bar plot



Horizontal error bar plot



To create a plot with both vertical and horizontal error bars:

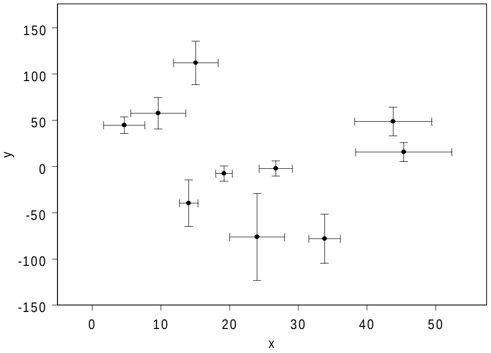


	1	2	3	4	5
	x	y	z	w	
1	4.67	44.73	-3.00	-9.00	
2	9.61	57.65	-4.00	16.96	
3	14.04	-39.66	1.35	-25.28	
4	15.07	112.17	2.25	22.50	

1. Select the `x`, `y`, `z`, and `w` columns to create an error bar plot using the `z` data to display horizontal error bars and the `w` data to display vertical error bars.

2. Click the button on the **Plots 2D** palette.

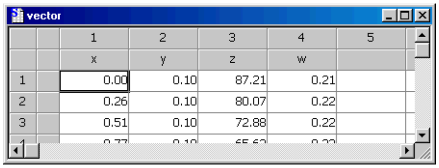
Error bar–both plot



Vector Plots

A vector plot displays the direction and velocity of flow at positions in the *x*-*y* plane. You can also use vector plots to draw any group of arrows using the data in a data set.

To create a vector plot:

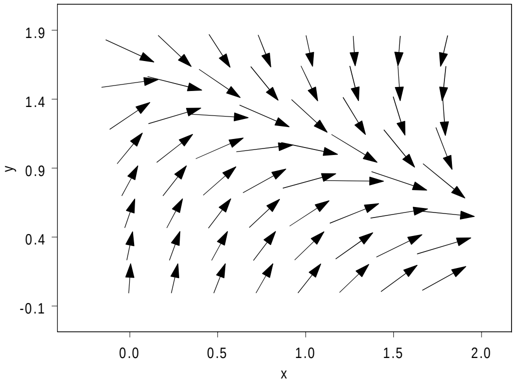


		1	2	3	4	5
		x	y	z	w	
1		0.00	0.10	87.21	0.21	
2		0.26	0.10	80.07	0.22	
3		0.51	0.10	72.88	0.22	
4		0.77	0.10	65.62	0.22	

1. Select the x, y, z (angle values), and w (magnitude values) columns.

2. Click the button on the **Plots 2D** palette.

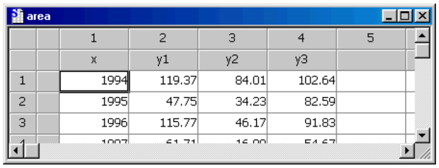
Vector plot



Area Charts

An area chart is useful for showing how each series in a set of data affects the whole over time.

To create an area chart:

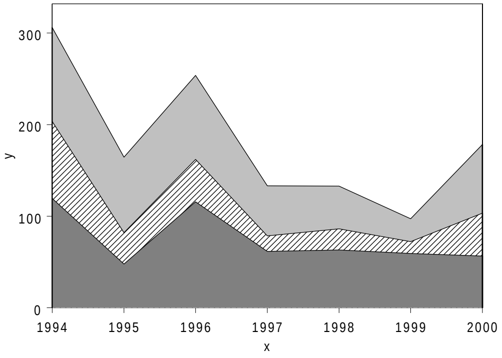


		1	2	3	4	5
		x	y1	y2	y3	
1		1994	119.37	84.01	102.64	
2		1995	47.75	34.23	82.59	
3		1996	115.77	46.17	91.83	
4		1997	61.71	16.00	54.67	

1. Select the x column and a single y column to draw an *x,y* curve and fill the area beneath the curve. Select x and multiple y columns to draw a curve for each set of values and fill the area beneath each curve.

2. Click the button on the **Plots 2D** palette.

Area chart

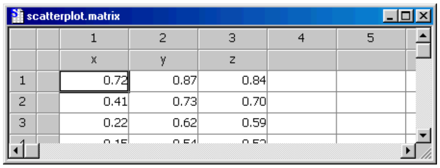


Scatterplot Matrices

A scatterplot matrix is an array of pairwise scatter plots showing the relationship between any pair of variables in a multivariate data set.

To create a scatterplot matrix:

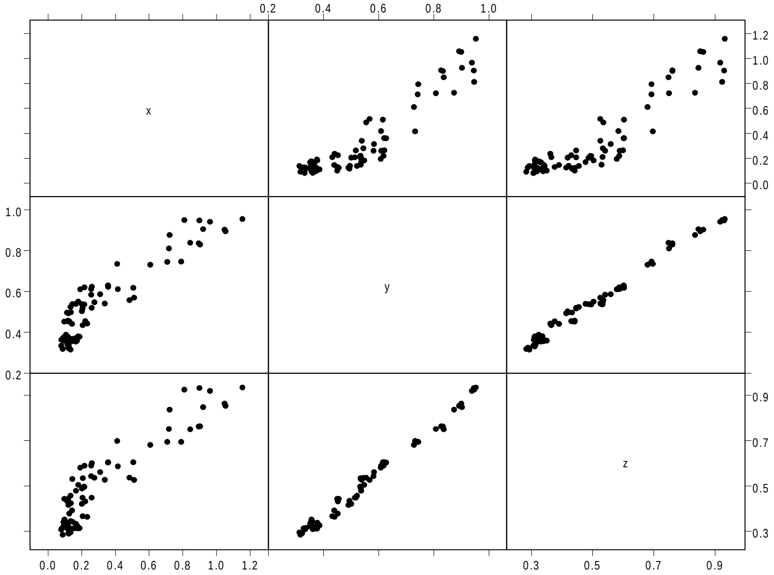
1. Select the `x`, `y`, and `z` columns.



	1	2	3	4	5
	x	y	z		
1	0.72	0.87	0.84		
2	0.41	0.73	0.70		
3	0.22	0.62	0.59		

2. Click the button on the **Plots 2D** palette.

Scatterplot matrix



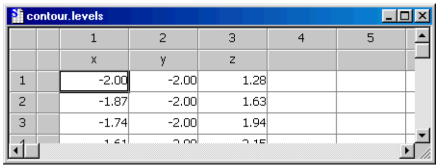
Contour/Levels Plots

2D contour/levels plots are representations of three-dimensional data in a two-dimensional plane. Each contour line represents a level or height from the corresponding three-dimensional surface. Filled contour plots use color between contour lines to differentiate between the levels. 3D contour plots are identical to 2D contour plots except that the contour lines are drawn in three-dimensional space.

You can create 2D and 3D contour plots from either gridded or irregular data. For more information, see the online help.

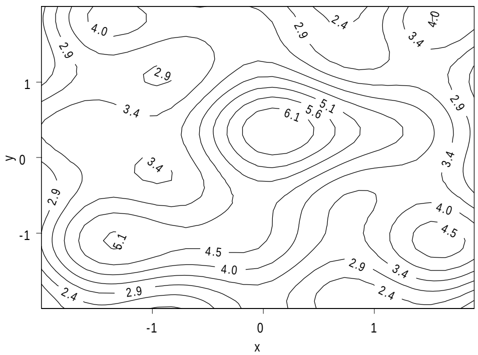
To create any of the contour/levels plots:

1. Select the x, y, and z columns.
2. Click the **Plots 2D** or **Plots 3D** palette button corresponding to the desired plot.

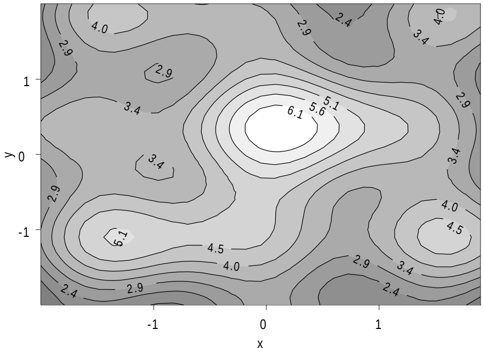


		1	2	3	4	5
		x	y	z		
1		-2.00	-2.00	1.28		
2		-1.87	-2.00	1.63		
3		-1.74	-2.00	1.94		
4		1.61	2.00	2.15		

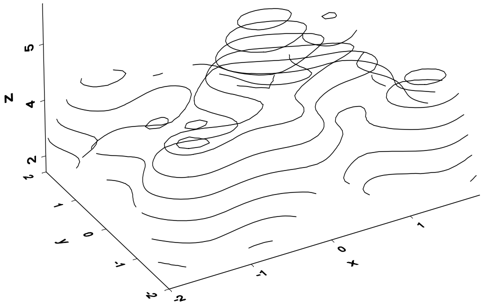
Contour plot



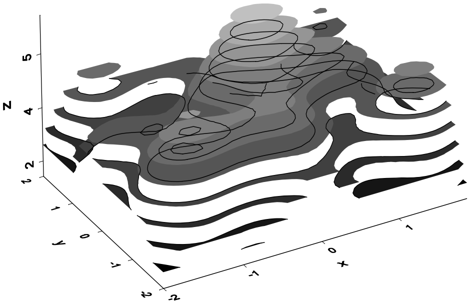
Filled contour plot



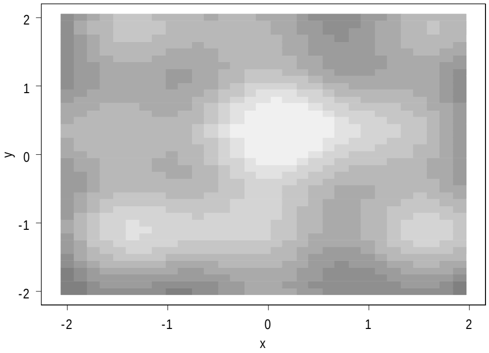
3D contour plot



3D filled contour plot



Levels plot

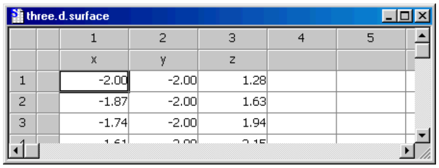


Surface/3D Bar Plots

A surface plot draws a mesh or grid of your data in three-dimensional space, and a spline plot is a smoothed surface of gridded data. A 3D bar plot is a gridded surface drawn with bars; for two variables, a 3D bar plot produces a binomial histogram showing the joint distribution of the data. A color surface plot lets you specify color fills for the bands or grids on a surface plot.

You can create surface and 3D bar plots from either gridded or irregular data. For more information, see the online help.

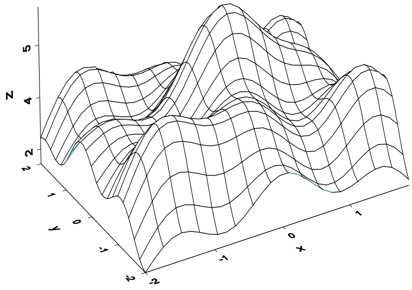
To create any of the 3D surface/bar plots:



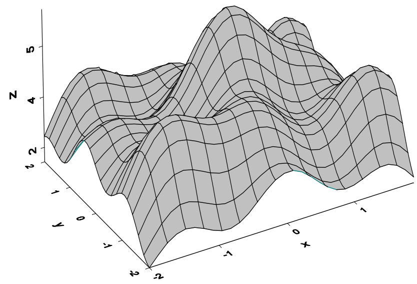
	1	2	3	4	5
	x	y	z		
1	-2.00	-2.00	1.28		
2	-1.87	-2.00	1.63		
3	-1.74	-2.00	1.94		

1. Select the x, y, and z columns.
2. Click the **Plots 3D** palette button corresponding to the desired plot.

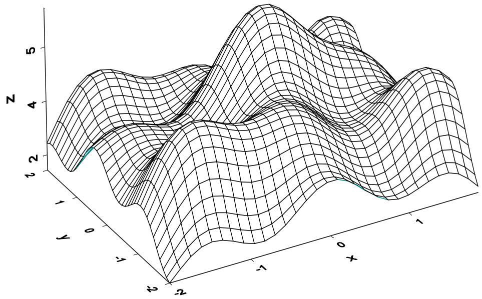
3D coarse surface plot



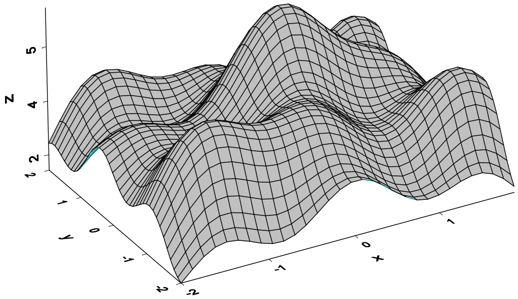
3D filled coarse surface plot



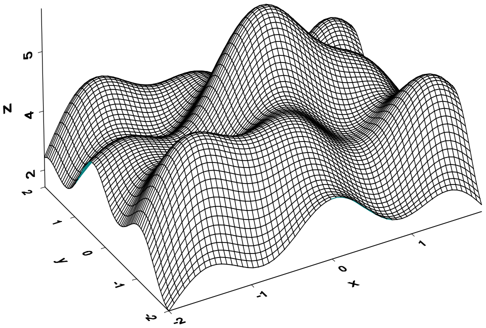
3D data grid surface plot



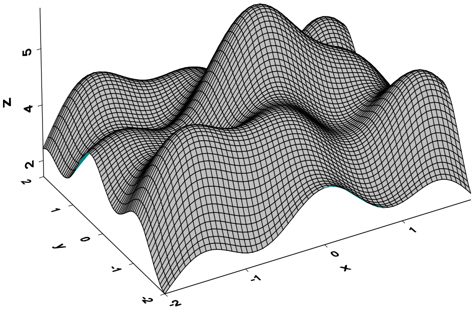
3D filled data grid surface plot



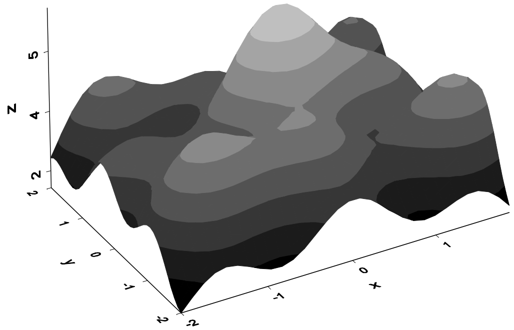
3D spline surface plot



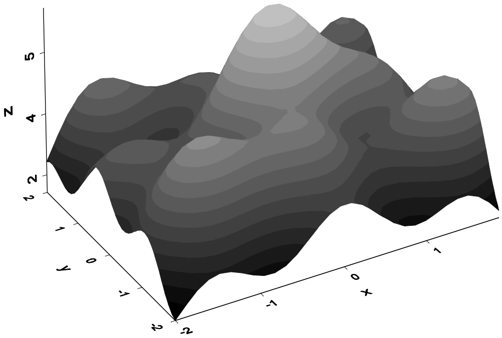
3D filled spline surface plot



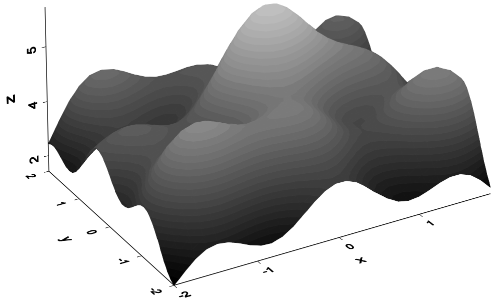
3D 8 color surface plot



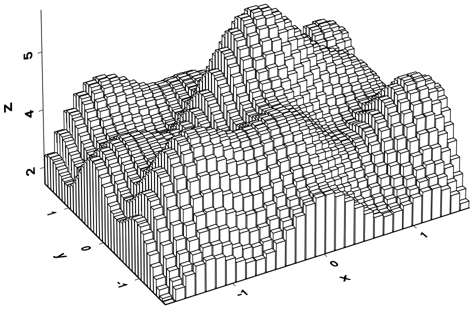
3D 16 color surface plot



3D 32 color surface plot



3D bar plot



Comment Plots

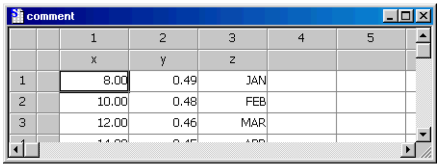
A comment plot plots character data on a graph and can be used with all axes types. For a 2D comment plot, the *x* and *y* values specify the *x,y* position of each comment, and the *z* values are the comment text. If no *z* values are specified, the *x,y* coordinates are displayed on the plot.

You can use comment plots to plot any character, or combination of characters, as a symbol, to produce labeled scatter plots, to automatically plot character data, and to create tables.

To create a comment plot:

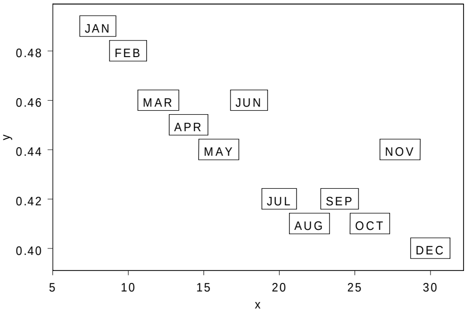
1. Select the x, y, and z columns.

2. Click the button on the **Extra Plots** palette.



	1	2	3	4	5
	x	y	z		
1	8.00	0.49	JAN		
2	10.00	0.48	FEB		
3	12.00	0.46	MAR		

Comment plot



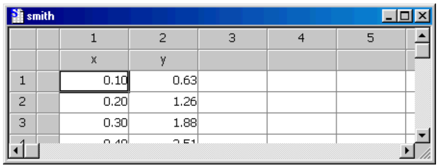
Smith Plots

Smith plots, which are drawn in polar coordinates, are often used in microwave engineering to show impedance characteristics. There are three types of Smith plots: reflection, impedance, and circle. Only reflection plots can be produced automatically by clicking a palette button.

In the Smith–reflection plot, the *x* values are magnitudes, which must range between 0 and 1. The *y* values are angles, measured clockwise from the horizontal.

To create a Smith–reflection plot:

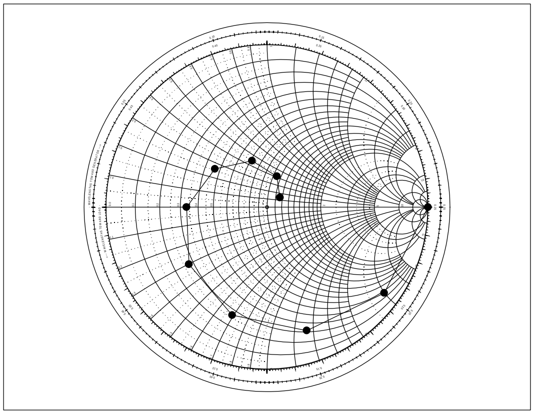
1. Select the x and y columns.


smith

	1	2	3	4	5
	x	y			
1	0.10	0.63			
2	0.20	1.26			
3	0.30	1.88			
	0.40	2.51			

2. Click the button on the **Extra Plots** palette.

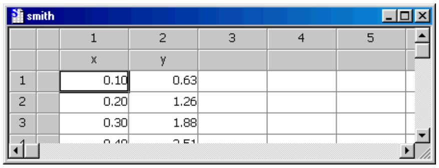
Smith–reflection plot



In the Smith–impedance plot, the *x* values are resistance data and the *y* values are reactance data.

To create a Smith–impedance plot:

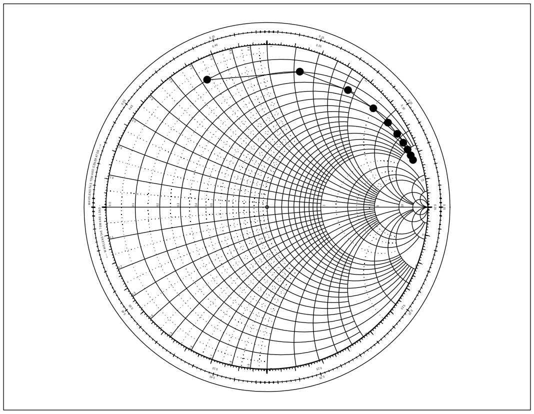
1. Select the x and y columns.


smith

	1	2	3	4	5
	x	y			
1	0.10	0.63			
2	0.20	1.26			
3	0.30	1.88			
	0.40	2.51			

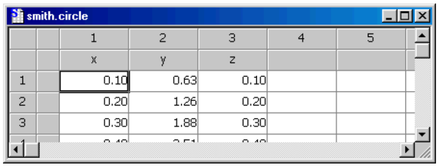
2. Click the button on the **Extra Plots** palette.
3. Right-click a plot element and select **Options** from the shortcut menu.
4. In the **Data Options** group, select **Impedance** in the **Data Type** field.
5. Click **OK**.

Smith–impedance plot



In the Smith–circle plot, the *x* values, which must be positive, specify the distance from the center of the Smith plot to the center of the circle you want to draw. The *y* values are angles, measured clockwise from the horizontal. The *z* values are radii and must also be positive.

To create a Smith–circle plot:

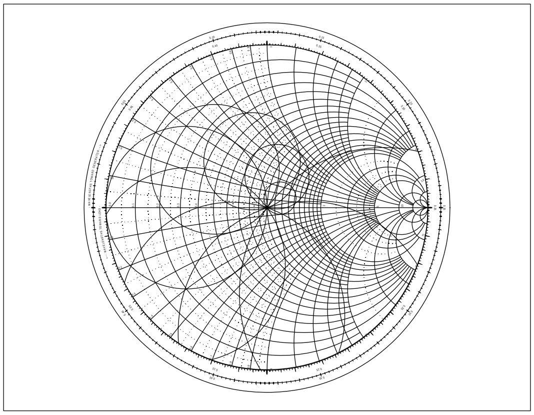


smith.circle

		1	2	3	4	5
		x	y	z		
1		0.10	0.63	0.10		
2		0.20	1.26	0.20		
3		0.30	1.88	0.30		

1. Select the x, y, and z columns.
2. Click the button on the **Extra Plots** palette.
3. Right-click a plot element and select **Options** from the shortcut menu.
4. In the **Data Options** group, select **Circle** in the **Data Type** field.
5. Click **OK**.

Smith–circle plot

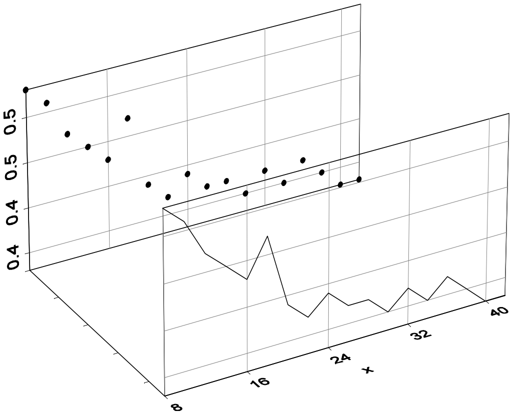


Projection Plots

Most of the 2D plot types can be projected onto a 3D plane. Projection plots are useful for combining multiple 2D plots in 3D space and then rotating the results.

You can use either menus or drag-and-drop to create projection plots. For details on creating projection plots, see the online help.

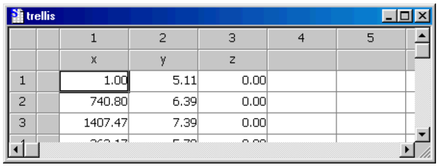
Projection plot



TRELLIS GRAPHS

Trellis graphs let you view relationships between different variables in a data set through conditioning. A series of panels is displayed, with each panel containing a subset of the data divided into intervals of a conditioning variable.

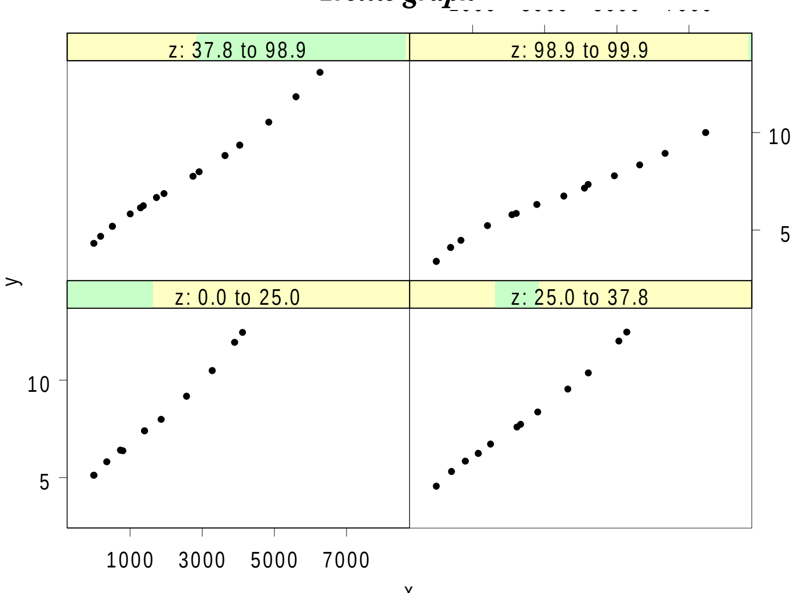
To create a scatter plot of *y* against *x* conditioned on *z*:



	1	2	3	4	5
	x	y	z		
1	1.00	5.11	0.00		
2	740.80	6.39	0.00		
3	1407.47	7.39	0.00		

1. Open the **Plots 2D** palette and then click the **Set Conditioning Mode** button on the **Standard** toolbar. A yellow bar appears at the top of each plot button in the palette.
2. Select the `x`, `y`, and `z` columns.
3. Click the button on the **Plots 2D** palette.

Trellis graph



For more examples of Trellis graphs, see Trellis Graphs on page 96.

IMPORTING AND EXPORTING DATA

5

INTRODUCTION

One easy method of getting data into Spotfire S+ for plotting and analysis is to import the data from another source.

Spotfire S+ can read and write a wide variety of data formats, making importing and exporting data easy. Spotfire S+ also supports the Open DataBase Connectivity (ODBC) standard, allowing you to import and export between Spotfire S+ and any ODBC-compliant database.

You can also import data from the leading financial databases–Bloomberg, FAME, and MIM–for statistical and graphical analysis. To do this, you must load the financedb library from the main menu by navigating to **File ▶ Load Library** or from the **Commands** window:

```
> library(financedb)
```

This library contains all the relevant functions for importing and exporting data, including customizing the dialogs. Help is available for all the financial-related functions from the **Commands** window, and you can also access help from the main menu by navigating to **Help ▶ Available Help ▶ financedb**.

In this chapter, we discuss each of these import/export options in turn.

SUPPORTED FILE TYPES FOR IMPORTING AND EXPORTING

Table 5.1 lists all the supported file formats for importing and exporting data. Note that Spotfire S+ both imports from and exports to all the listed types with two exceptions: SigmaPlot (**.jnb**) files are import only and HTML (**.htm***) tables are export only.

Note
As of Spotfire S+ version 8.2, native database drivers are deprecated. In lieu of these drivers, you should use JDBC/ODBC drivers for all supported database vendors.

Table 5.1: *Supported file types for importing and exporting data.*

Format	**Type**	**Default Extension**	**Notes**
ASCII File	`"ASCII"`	**.csv** **.asc**, **.csv**, **.txt**, **.prn** **.asc**, **.dat**, **.txt**, **.prn**	Comma delimited. Delimited. Whitespace delimited; space delimited; tab delimited; user-defined delimiter.
dBASE File	`"DBASE"`	**.dbf**	II, II+, III, IV files.
DIRECT-DB2	`"DIRECT-DB2"`		DB2 database connection. No file argument should be specified.
DIRECT-ORACLE	`"DIRECT-ORACLE"`	**.ora**	Oracle database connection. No file argument should be specified.
DIRECT-SQL	`"DIRECT-SQL"`		Microsoft SQL Server database connection. No file argument should be specified. This option is available only in Spotfire S+ for Windows.

Table 5.1: *Supported file types for importing and exporting data. (Continued)*

Format	Type	Default Extension	Notes
DIRECT-SYBASE	`"DIRECT-SYBASE"`		Sybase database connection. No file argument should be specified.
Epi Info File	`"EPI"`	**.rec**	
Fixed Format ASCII File	`"FASCII"`	**.fix**, **.fsc**	
FoxPro File	`"FOXPRO"`	**.dbf**	
Gauss Data File	`"GAUSS"`, `"GAUSS96"`	**.dat**	Automatically reads the related **DHT** file, if any, as `GAUSS 89`. If no **DHT** file is found, reads the **.DAT** file as `GAUSS96`. `GAUSS96` is available in Unix only.
HTML Table	`"HTML"`	**.htm***	Export only.
Lotus 1-2-3 Worksheet	`"LOTUS"`	**.wk***, **.wr***	
Matlab Matrix	`"MATLAB"`	**.mat**	File must contain a single matrix. Spotfire S+ recognizes the file's platform of origin on import. On export, specify `type="MATLAB"` to create a pre-MATLAB 7 version file; otherwise, specify `type="MATLAB7"` to export the MATLAB 7 file format.
Minitab Workbook	`“MINITAB”`	**.mtw**	Versions 8 through 12.
Microsoft Access File	`"ACCESS"`	**.mdb**	Microsoft Access file. This file type is available only in Spotfire S+ for Windows.

Table 5.1: *Supported file types for importing and exporting data. (Continued)*

Format	**Type**	**Default Extension**	**Notes**
Microsoft Excel Worksheet	`"EXCEL"` `"EXCELX"`	**.xl?** **.xlsx**	Versions 2.1 through 2010. Note that `"EXCELX"` and the new file extension, `".xlsx"` are for files imported from or exported to Excel 2007 or 2010.
ODBC	`"ODBC"`	Not applicable	For Informix (**.ifx**), Oracle (**.ora**), and Sybase (**.syb**) databases. This file type is available only in Spotfire S+ for Windows.
Oracle	`"Oracle"`	**.ora**	Same as `"DIRECT-ORACLE"`. Oracle database connection. No file argument should be specified.
Paradox Data File	`"PARADOX"`	**.db**	
QuattroPro Worksheet	`"QUATTRO"`	**.wq?**, **.wb?**	
S-PLUS File	`"SPLUS"`	**.sdd**	Windows, DEC UNIX. Uses `data.restore()` to import file.

STATA	`“STATA”`
	`“STATASE”` `(export only)`
		.dta	Portable across platforms (UNIX, Windows, and Mac). Can import STATA files and export STATA or STATASE.
			When exporting a STATA dataset, you are limited to 2,047 characters. For larger STATA datasets (up to 32,767 variables), specify `type="STATASE"` .

Table 5.1: *Supported file types for importing and exporting data. (Continued)*

Format	Type	Default Extension	Notes
SAS File	"SAS", "SASV6"	**.sd2**	SAS version 6 files, Windows.
	"SAS1", "SAS6UX32"	**.ssd01**	SAS version 6 files, HP, IBM, Sun UNIX.
	"SAS4", "SAS6UX64"	**.ssd04**	SAS version 6 files, Digital UNIX.
	"SAS7"	**.sas7bdat**, **.sd7**	SAS version 7 or 8 files, current platform.
	"SAS7WIN"	**.sas7bdat**, **.sd7**	SAS version 7 or later data files, Windows.
	"SAS7UX32"	**.sas7bdat**, **.sd7**	SAS version 7 or later data files, Solaris (SPARC), HP-UX, IBM AIX.
	"SAS7UX64"	**.sas7bdat**, **.sd7**	SAS version 7 or later data files, Digital/Compaq UNIX.
SAS Transport File	"SAS_TPT"	**.xpt**, **.tpt**	Version 6.*x*. Some special export options may need to be specified in your SAS program. We suggest using the SAS Xport engine (not PROC CPORT) to read and write these files.
	“SAS_CPORT”	**.stc**, **.cpt**	CPORT files created by SAS versions 7.01-9.01 can be imported.
SigmaPlot File	"SIGMAPLOT"	**.jnb**	Import only.
SPSS Data File	"SPSS"	**.sav**	OS/2; Windows; HP, IBM, Sun, DEC UNIX.

Table 5.1: *Supported file types for importing and exporting data. (Continued)*

Format	**Type**	**Default Extension**	**Notes**
SPSS Portable File	`"SPSSP"`	**.por**	
Stata Data File	`"STATA"`	**.dta**	Versions 2.0 and higher.
Sybase	`"SYBASE"`		Same as `"DIRECT-SYBASE"`. Sybase database connection. No file argument should be specified.
SYSTAT File	`"SYSTAT"`	**.syd**, **.sys**	Double- or single-precision **.sys** files.

Note

All imports from and exports to Informix, Oracle, and SYBASE databases are done using ODBC so the various ODBC components must be properly installed. See Importing From and Exporting to ODBC Tables on page 179.

IMPORTING FROM AND EXPORTING TO DATA FILES

Spotfire S+ provides convenient dialogs for importing and exporting data. When importing most types of files, typically you only need to specify the file's name and type. By default, Spotfire S+ imports the data into a new data set and displays it in a **Data** window.

Note

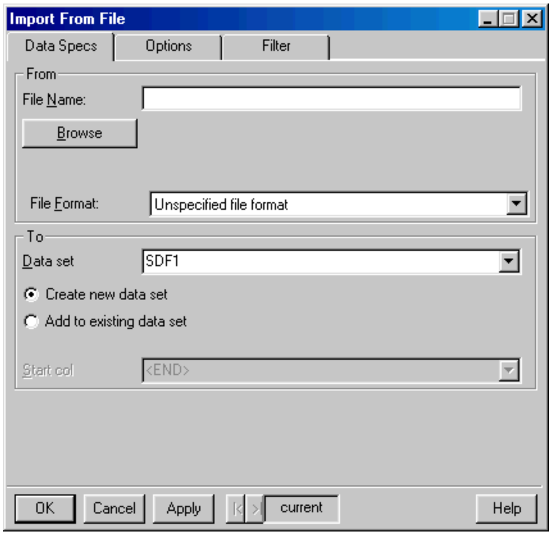
If you prefer not to have your imported data automatically displayed in a **Data** window, choose **Options ▶ General Settings** from the main menu, click the **Data** tab, and clear the **Show Imported Data in View** check box.

When exporting to most types of files, usually all you need to do is specify the data set you want to export and the new file's name and type. By default, Spotfire S+ exports the data into a new data file using default settings.

Importing From a Data File

The **Import From File** dialog, shown in Figure 5.1 below, consists of three tabbed pages labeled **Data Specs**, **Options**, and **Filter**. To open the dialog, do one of the following:

- From the main menu, choose **File ▶ Import Data ▶ From File**.
- From the main menu, choose **Data ▶ Select Data**. In the **Source** group of the **Select Data** dialog, click the **Import File** radio button and then click **OK**.



File Name:

File Format: Unspecified file format

Data set: SDF1

● Create new data set

○ Add to existing data set

Start col: <END>

Figure 5.1: *The* ***Data Specs*** *page of the* ***Import From File*** *dialog.*

Data Specs page, From group

File Name Specify the file you want to import by doing one of the following:

- Click **Browse** and navigate to the file.
- If the file is in your current project folder, simply type the file name, including its extension.
- If the file is not in your current project folder, type the full pathname of the file.

File Format Select the format of the file from the dropdown list in this field.

Hint

In most cases, if you use **Browse** to specify the file to import, Spotfire S+ automatically selects the correct format type.

Data Specs page, To group

Data set By default, Spotfire S+ creates a new data set with the same name as the file being imported. To override the default name, type a different name in this field. To import the data into an existing data set, type or select its name.

Note

If the name you specify in the **Data set** field is the name of an existing object, by default Spotfire S+ prompts you for an overwrite confirmation. To turn off this feature, choose **Options ► General Settings** from the main menu, click the **Data** tab, and clear the **Prompt on import overwrite** check box.

Create new data set When selected, Spotfire S+ creates a new data set with the name specified in the **Data set** field.

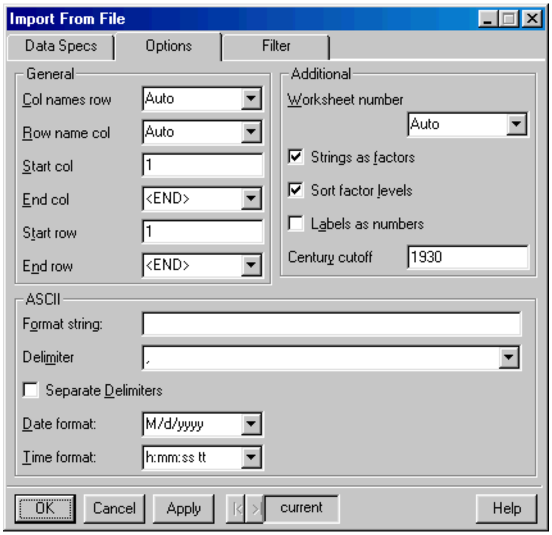
Add to existing data set When selected, Spotfire S+ imports the data into the existing data set specified in the **Data set** field.

Start col By default, when you select **Add to existing data set**, Spotfire S+ appends the imported data to the end of the data set. To specify a different starting column, type or select its name in this field.

Note

After you make your selections on the **Data Specs** page of the **Import From File** dialog, Spotfire S+ has the basic information necessary to import a data file. For greater control over your importing parameters, use the **Options** and **Filter** pages, discussed below.

The **Options** page of the **Import From File** dialog is shown in Figure 5.2.



General

Col names row: Auto

Row name col: Auto

Start col: 1

End col: <END>

Start row: 1

End row: <END>

Additional

Worksheet number: Auto

☑ Strings as factors

☑ Sort factor levels

□ Labels as numbers

Century cutoff: 1930

ASCII

Format string:

Delimiter: ,

□ Separate Delimiters

Date format: M/d/yyyy

Time format: h:mm:ss tt

Figure 5.2: *The **Options** page of the **Import From File** dialog.*

Options page, General group

Col names row If the file you are importing contains column names, type the number corresponding to the row in the file that contains the column names. By default, Spotfire S+ attempts to formulate sensible column names from the first imported row.

Row name col If the file you are importing contains row names, type the number corresponding to the column in the file that contains the row names.

Note

Because the underscore character is a reserved character in S-PLUS, Spotfire S+ replaces the underscore ("_") with a period (".") when importing column or row names.

Start col Type the number corresponding to the first data column to be imported from the file. By default, Spotfire S+ begins reading from the first column in the file.

End col Type the number corresponding to the last data column to be imported from the file. The default is the last column in the file.

Start row Type the number corresponding to the first data row to be imported from the file. By default, Spotfire S+ begins reading from the first row in the file.

End row Type the number corresponding to the last data row to be imported from the file. The default is the last row in the file.

Options page, Additional group

Worksheet number When importing data from a spreadsheet such as Excel or Lotus, specify the number of the worksheet you want to import.

Strings as factors When selected, Spotfire S+ converts all character strings to factor variables when the data file is imported. Otherwise, character strings are imported with class `character`.

Sort factor levels When selected, Spotfire S+ (alphabetically) sorts the levels for all the factor variables created from character strings. Otherwise, the levels are defined in the order in which they are read from the data file.

Labels as numbers When selected, SAS and SPSS variables that have labels are imported as numbers. Otherwise, the value labels are imported.

Century cutoff When importing an ASCII text file, this field specifies the origin for two-digit dates. Dates with two-digit years are assigned to the 100-year span that starts with this numeric value. The default value of 1930 thus reads the date `6/15/30` as June 15, 1930, while the date `12/29/29` is interpreted as December 29, 2029.

Options page, ASCII group

Format string This field is required when importing a formatted ASCII (FASCII) text file. A format string specifies the data types and formats of the imported columns. For more information on the syntax accepted by this field, see Format Strings on page 191.

Delimiter Specify all characters used to separate elements in an ASCII file. By default, Spotfire S+ uses the comma (“,”).

Separate Delimiters When selected, the separator is strictly a single character; otherwise, repeated consecutive separator characters are treated as one separator.

Date format Select the format you prefer to use when importing date data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

Time format Select the format you prefer to use when importing time data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

Note

To change the default delimiter for importing ASCII files, choose **Options** ▶ **General Settings** from the main menu and then click the **Data** tab. In the **ASCII Import/Export Options** group, type your preferred default in the **Import Delimiter** field.

The **Filter** page of the **Import From File** dialog is shown in Figure 5.3.

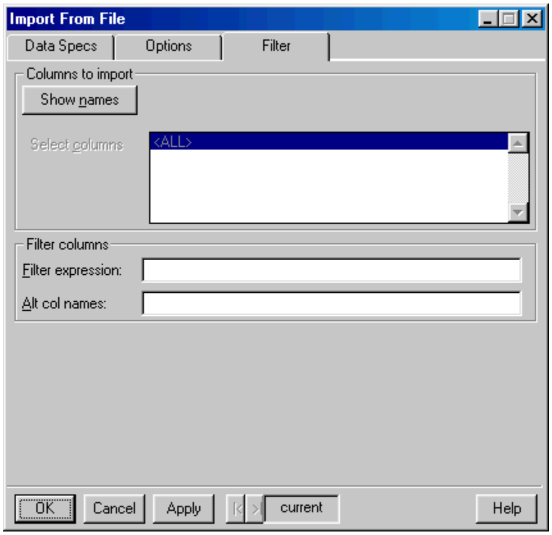


Figure 5.3: *The **Filter** page of the **Import From File** dialog.*

Filter page, Columns to import group

Select Columns Specify the columns you want to import by clicking the **Show Names** button and selecting the columns from the list in this field.

Filter page, Filter columns group

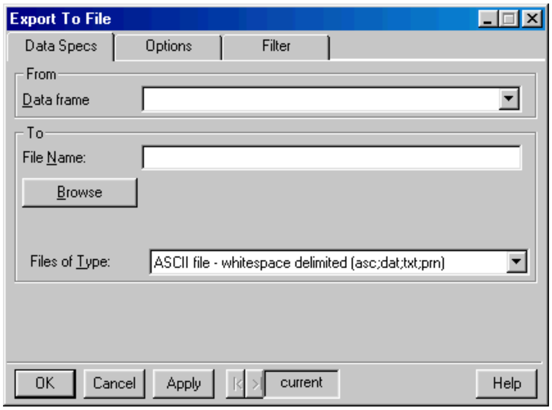
Filter expression By specifying a query, or filter expression, you can subset the data you import. By default, this field is blank, resulting in all the data being imported. For more information on the syntax accepted by this field, see Filter Expressions on page 187.

Alt col names If the data file you are importing either does not contain column names or contains names that you want to replace, type a comma-delimited list of names that you want to use in this field.

Exporting to a Data File

The **Export To File** dialog, shown in Figure 5.4 below, consists of three tabbed pages labeled **Data Specs**, **Options**, and **Filter**. To open the dialog, do the following:

- From the main menu, choose **File** ▶ **Export Data** ▶ **To File**.



Files of Type: ASCII file - whitespace delimited (asc;dat;txt;prn)

Figure 5.4: *The **Data Specs** page of the **Export To File** dialog.*

Data Specs page, From group

Data frame Type or select the name of the data set you want to export.

Data Specs page, To group

File Name By default, Spotfire S+ creates a new data file with the same name as the data set being exported and saves it in your current project folder. To save the file in a different location, click **Browse** and navigate to the desired folder. You can also replace the default file name with a different name.

Note

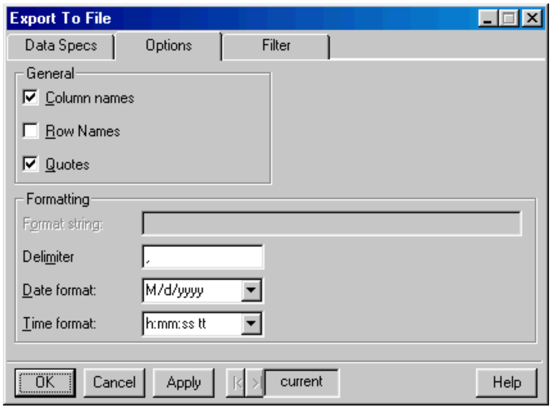
If the name you specify in the **File Name** field is the name of an existing file, Spotfire S+ prompts you for an overwrite confirmation.

Files of Type Select the desired format for the exported file from the dropdown list in this field. The file extension is automatically reflected in the **File Name** field.

Note

After you make your selections on the **Data Specs** page of the **Export To File** dialog, Spotfire S+ has the basic information necessary to export a data set. For greater control over your exporting parameters, use the **Options** and **Filter** pages, discussed below.

The **Options** page of the **Export To File** dialog is shown in Figure 5.5.



☑ Column names
☐ Row Names
☑ Quotes

Format string:
Delimiter ,
Date format: M/d/yyyy
Time format: h:mm:ss tt

Figure 5.5: *The **Options** page of the **Export To File** dialog.*

Options page, General group

Column names When selected, Spotfire S+ includes the column names of the data set as the first row in the file.

Row Names When selected, Spotfire S+ includes the row names of the data set as the first column in the file.

Quotes When selected, Spotfire S+ exports factor and character variables as character strings enclosed with quotation marks.

Options page, Formatting group

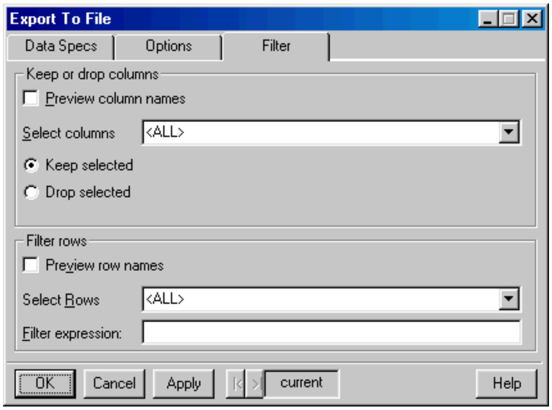
Format string When exporting to an ASCII text file, specify the data types and formats for the exported columns. For more information on the syntax accepted by this field, see Notes on Importing and Exporting Files of Certain Types on page 190.

Delimiter When exporting to an ASCII text file, specify the delimiter to use to separate the elements in the file. By default, Spotfire S+ uses the comma (“,”).

Date format Select the format you prefer to use when exporting date data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

Time format Select the format you prefer to use when exporting time data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

The **Filter** page of the **Export To File** dialog is shown in Figure 5.6.



Keep or drop columns

☐ Preview column names

Select columns <ALL>

● Keep selected

○ Drop selected

Filter rows

☐ Preview row names

Select Rows <ALL>

Filter expression:

Figure 5.6: *The **Filter** page of the **Export To File** dialog.*

Filter page, Keep or drop columns group

Preview column names When selected, Spotfire S+ populates the **Select columns** dropdown list with the column names of the data set you are exporting.

Select columns Depending upon your choice of **Keep selected** or **Drop selected**, specify either the columns you want to export or the columns you do not want to export, respectively. When **Preview column names** is selected, this field becomes a dropdown list from which you can make your selections. When **Preview column names** is not selected, you must type a column list of names (see Creating a Column List on page 32) in this field.

Keep selected When selected, Spotfire S+ exports only the columns you specify in the **Select columns** dropdown list.

Drop selected When selected, Spotfire S+ exports all columns except those you specify in the **Select columns** dropdown list.

Filter page, Filter rows group

Preview row names When selected, Spotfire S+ populates the **Select Rows** dropdown list with the row names of the data set you are exporting.

Select Rows Specify the rows you want to export in this field. When **Preview row names** is selected, this field becomes a dropdown list from which you can make your selections. When **Preview row names** is not selected, you must type a row list of numbers (see Creating a Row List on page 36) in this field.

Filter expression By specifying a query, or filter expression, you can subset the data you export. By default, this field is blank, resulting in all the data being exported. For more information on the syntax accepted by this field, see Filter Expressions on page 187.

IMPORTING FROM AND EXPORTING TO ODBC TABLES

Applications such as Microsoft Access and Excel, as well as most commercial databases (generically known as data sources), support the Open DataBase Connectivity (ODBC) standard.

Designed to provide a unified, standard way to exchange data between databases, ODBC has become widely supported. Each application typically has an ODBC driver that allows the application to accept or distribute data via the ODBC interface. Spotfire S+ supports ODBC versions 2.0 and 3.0.

Note

As of Spotfire S+ version 8.2, native database drivers are deprecated. In lieu of these drivers, you should use JDBC/ODBC drivers for all supported database vendors.

Spotfire S+ provides convenient dialogs for importing data from and exporting data to ODBC databases and applications that support the ODBC specification. By default, Spotfire S+ imports an entire table into an S-PLUS data frame and displays it in a **Data** window. Similarly, Spotfire S+ exports an entire data set into an ODBC table unless you specify otherwise.

Note

If you prefer not to have your imported data automatically displayed in a **Data** window, choose **Options ▶ General Settings** from the main menu, click the **Data** tab, and clear the **Show Imported Data in View** check box.

The ODBC Data Source Administrator

The ODBC Data Source Administrator manages database drivers and data sources. You can find the ODBC Data Source Administrator from the Windows **Start** menu. Click **Control Panel ▶ Administrative Tools** and look for the Administrator icon **Data Sources (ODBC)**.

ODBC Drivers

An ODBC *driver* is a dynamically linked library (DLL) that connects an application or database to the ODBC interface. Applications call functions in the ODBC interface, which are implemented in the database-specific drivers. The use of drivers isolates applications from database-specific calls in the same way that printer drivers isolate word processing programs from printer-specific commands.

Spotfire S+ is automatically installed with an ODBC driver that connects to Spotfire S+, but you must provide an appropriate ODBC driver for your database. Contact your database vendor or a third-party ODBC driver vendor for assistance.

To determine which drivers are already installed on your computer, start the Administrator and click the **Drivers** tab. The name, version, company, file name, and file creation date of each ODBC driver installed on the computer are displayed. To add a new driver or to delete an installed driver, use the driver's setup program.

Defining a Data Source

A *data source* is a logical name for a data repository or database. It points to the data you wish to access, the application that has the data, and the computer and network connections necessary to reach the data. Adding or configuring a data source can be done using the Administrator or from within Spotfire S+ (see the online help).

To add a data source, open the Administrator by double-clicking the Administrator icon in the **Control Panel**. If you are running Administrator 3.0, you can then click the tab that corresponds to the type of DSN (Data Source Name) you wish to create. The type of DSN controls access to the data source you are creating, as follows:

- **User DSN**s are specific to the login account that is in effect when they are created. They are local to a computer and dedicated to the current user.
- **System DSN**s are local to a computer but not dedicated to a particular user. Any user having login privileges can use a data source set up with a System DSN.
- **File DSN**s are file-based data sources that may be shared among all users that have the same drivers installed. These data sources are neither dedicated to a user nor local to a computer.

Click the appropriate tab and then click the **Add** button. (If you are running Administrator 2.0, you can create a User DSN by clicking the **Add** button from the initial dialog. Or, to create a System DSN, click that button and then the **Add** button in the subsequent dialog. File DSNs are only available with Administrator 3.0.) The **Create New Data Source** dialog appears.

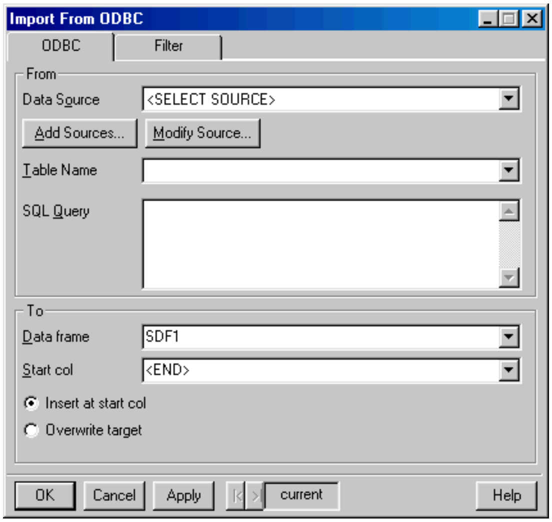
Select the ODBC driver for the database you want to connect to and click **Finish**. If the list of drivers in the **Create New Data Source** dialog is empty or does not contain a driver for your database or application, you need to install the database or its ODBC driver.

At this point, a driver-specific dialog should appear asking database- and driver-specific information required to connect to the database. Fill in the required fields and click **OK**. The new data source should be visible the next time the **Import From ODBC** or **Export to ODBC** dialogs are launched from Spotfire S+.

Importing From an ODBC Table

The **Import From ODBC** dialog, shown in Figure 5.7 below, consists of two tabbed pages labeled **ODBC** and **Filter**. To open the dialog, do the following:

- From the main menu, choose **File ▶ Import Data ▶ From ODBC Connection**.



Import From ODBC

From

Data Source: <SELECT SOURCE>

Table Name:

SQL Query:

To

Data frame: SDF1

Start col: <END>

● Insert at start col

○ Overwrite target

Figure 5.7: *The* ***ODBC*** *page of the* ***Import From ODBC*** *dialog.*

ODBC page, From group

Data Source Select the desired data source from the dropdown list in this field.

Note

A data source consists of the data you want to access, the application that has the data, and the computer and network connections necessary to reach the data. If the desired data source does not appear in the **Data Source** dropdown list, or if the list is blank, you may need to configure one or more data sources. To do so, either use the ODBC applet available in the Control Panel or click the **Add Sources** (or **Modify Source**) button in the **Import From ODBC** dialog. For more information on adding or modifying data sources, see the online help.

Table Name Once you select a data source, the dropdown list in this field is populated with table names. Select the table you want to import. By default, the first table in the data source is selected.

SQL Query Specify any legal Structured Query Language (SQL) statement in this field. When you select a table to import, a default SQL query is generated for importing all the data in the table.

ODBC page, To group

Data frame By default, Spotfire S+ creates a new data set with the same name as the table being imported. To override the default name, type a different name in this field. To import the data into an existing data set, type or select its name.

Start col By default, Spotfire S+ appends the imported data to the end of the data set specified in the **Data frame** field. To specify a different starting column, type or select its name in this field.

Insert at start col When selected, Spotfire S+ inserts the imported data starting at the column specified in the **Start col** field.

Overwrite target When selected, Spotfire S+ overwrites any existing data when importing.

Note

After you make your selections on the **ODBC** page of the **Import From ODBC** dialog, Spotfire S+ has the basic information necessary to import an ODBC table. For greater control over your importing parameters, use the **Filter** page, discussed below.

The **Filter** page of the **Import From ODBC** dialog is shown in Figure 5.8.

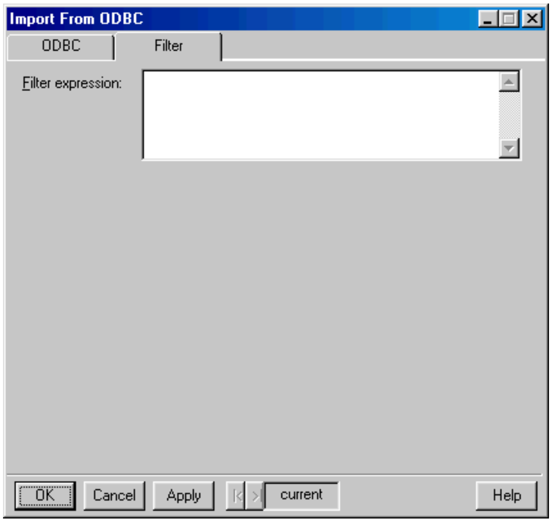


Figure 5.8: *The **Filter** page of the **Import From ODBC** dialog.*

Filter expression By specifying a query, or filter expression, you can subset the data you import. By default, this field is blank, resulting in all the data being imported. For more information on the syntax accepted by this field, see Filter Expressions on page 187.

Exporting to an ODBC Table

The **Export to ODBC** dialog, shown in Figure 5.9 below, consists of two tabbed pages labeled **ODBC** and **Filter**. To open the dialog, do the following:

- From the main menu, choose **File ▶ Export Data ▶ To ODBC Connection**.

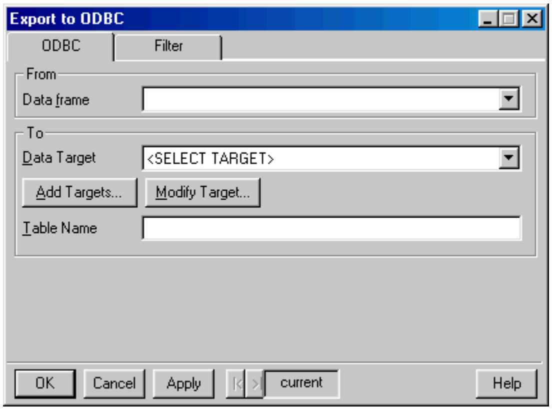


Figure 5.9: *The **ODBC** page of the **Export to ODBC** dialog.*

ODBC page, From group

Data frame Type or select the name of the data set you want to export.

ODBC page, To group

Data Target Select the desired data target from the dropdown list in this field.

Note

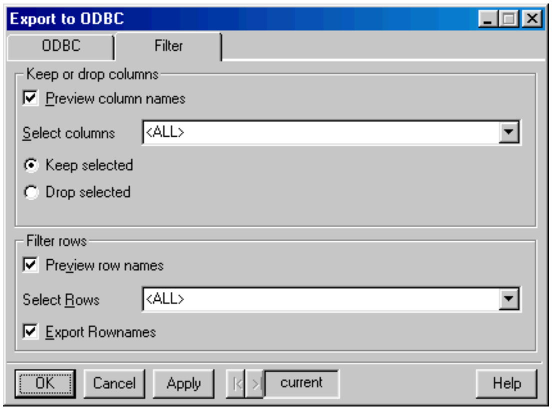
A data target is the counterpart when exporting to a data source when importing. If the desired data target does not appear in the **Data Target** dropdown list, or if the list is blank, you may need to configure one or more data targets. To do so, either use the ODBC applet available in the Control Panel or click the **Add Targets** (or **Modify Target**) button in the **Export To ODBC** dialog. For more information on adding or modifying data targets, see the online help.

Table Name By default, Spotfire S+ creates a new ODBC table with the same name as the data set being exported. If you prefer, you can replace the default table name with a different name.

Note

After you make your selections on the **ODBC** page of the **Export To ODBC** dialog, Spotfire S+ has the basic information necessary to export an ODBC table. For greater control over your exporting parameters, use the **Filter** page, discussed below.

The **Filter** page of the **Export to ODBC** dialog is shown in Figure 5.10.



Export to ODBC

ODBC | Filter

Keep or drop columns

☑ Preview column names

Select columns <ALL>

● Keep selected

○ Drop selected

Filter rows

☑ Preview row names

Select Rows <ALL>

☑ Export Rownames

Figure 5.10: *The **Filter** page of the **Export to ODBC** dialog.*

Filter page, Keep or drop columns group

Preview column names When selected, Spotfire S+ populates the **Select columns** dropdown list with the column names of the data set you are exporting.

Select columns Depending upon your choice of **Keep selected** or **Drop selected**, specify either the columns you want to export or the columns you do not want to export, respectively. When **Preview column names** is selected, this field becomes a dropdown list from which you can make your selections. When **Preview column names** is not selected, you must type a column list of names (see Creating a Column List on page 32) in this field.

Keep selected When selected, Spotfire S+ exports only the columns you specify in the **Select columns** dropdown list.

Drop selected When selected, Spotfire S+ exports all columns except those you specify in the **Select columns** dropdown list.

Filter page, Filter rows group

Preview row names When selected, Spotfire S+ populates the **Select Rows** dropdown list with the row names of the data set you are exporting.

Select Rows Specify the rows you want to export in this field. When **Preview row names** is selected, this field becomes a dropdown list from which you can make your selections. When **Preview row names** is not selected, you must type a row list of numbers (see Creating a Row List on page 36) in this field.

Export Rownames When selected, Spotfire S+ includes the row names of the data set as the first column in the ODBC table.

FILTER EXPRESSIONS

By including a logical expression in the **Filter expression** field of the import/export dialogs, you can subset the data you import or export. The filter expression must be written in terms of the original column names in the file and not in terms of the variable names specified by the **Col names row** field.

Note also that the filter is not evaluated by Spotfire S+, meaning that expressions containing built-in Spotfire S+ functions (such as `mean`) are not allowed. One special exception to this rule deals with missing values–while you can use `NA` to denote missing values in logical expressions, you cannot use `NA`-specific functions such as `is.na` and `na.exclude`.

Variable Expressions

To construct a variable expression, specify a single variable or an expression involving several variables. In addition to the usual arithmetic operators [`+ - * / ()`] that are available, Table 5.2 lists the relational operators that are accepted by the **Filter expression** field.

Table 5.2: *Relational operators.*

Operator	**Description**
`==`	Equal to
`!=`	Not equal to
`<`	Less than
`>`	Greater than
`<=`	Less than or equal to
`>=`	Greater than or equal to
`&`	And

Table 5.2: *Relational operators. (Continued)*

Operator	Description
|	Or
!	Not

For example, to select all rows that do not have missing values in the id column, type

```
id != NA
```

To import all rows corresponding to 10-year-old children who weigh less than 150 pounds, type

```
Age == 10 & Weight < 150
```

Note

When constructing a filter expression, be sure to type the variable name on the left side of the relational operator. For example, type `Age > 12`, rather than `12 < Age`.

You can also use the wildcard characters `?` (for single characters) and `*` (for strings of arbitrary length) to select subgroups of character variables. For example, the expression

```
account == ????22
```

selects all rows for which the `account` variable is six characters long and ends in 22. The expression

```
id == 3*
```

selects all rows for which `id` starts with 3, regardless of the length of the string.

To import specific row numbers, use the built-in variable `@rownum`. For example, the expression

```
@rownum < 200
```

imports the first 199 rows of a data file.

Sampling Functions

Three functions that permit the random sampling of data are available for use in filter expressions:

- `samp.rand` allows for simple random sampling. This function accepts the single numeric argument `prop`, where 0 ≤ `prop` ≤ 1. Rows are selected randomly with a probability equal to `prop`.
- `samp.fixed` selects a random sample of fixed size. This function accepts two numeric arguments, `sample.size` and `total.observations`. The first row is drawn with a probability of `sample.size/total.observations`. The *i*th row is drawn with a probability of `(sample.size -` *i*`)/(total.observations -` *i*`)`, where $i = 1, 2, ...,$ `sample.size`.
- `samp.syst` performs a systematic sample of every *n*th case after a random start. This function accepts the single numeric argument `n`.

Because expressions are evaluated from left to right, you can sample a subset of rows in a data file by first subsetting and then sampling. For example, to import a random sample of half the rows corresponding to high school graduates, use the expression

```
schooling >= 12 & samp.rand(0.5)
```

The sampling functions use the S-PLUS random number generator to create random samples. Therefore, you can use the `set.seed` function in the **Commands** window to produce the same data sample repeatedly. For more details, see the help files for `set.seed` and `.Random.seed`.

NOTES ON IMPORTING AND EXPORTING FILES OF CERTAIN TYPES

In this section, we offer some additional comments to help you when importing and exporting data in particular file formats.

ASCII (Delimited ASCII) Files

You have the option of specifying column names when importing columns from an ASCII file. To do so, type a list of names, separated by any of the delimiters specified in the **Delimiter** field, in the **Alt col names** field. For each imported column, specify one column name (for example, **Apples, Oranges, Pears**). You can use an asterisk (*) to denote a missing name (for example, **Apples, *, Pears**).

A row of data must always end with a new line. Multiple delimiter characters are not grouped and treated the same as single delimiters. For example, if the comma is a delimiter, two commas are interpreted as a missing field.

Double quotes (“”) are treated specially. They are always treated as an “enclosure” marker and must always come in pairs. Data contained within double quotes are read as a single unit of character data. Thus, spaces and commas can be used as delimiters, and spaces and commas can still be used within a character field as long as that field is enclosed by double quotes. Double quotes cannot be used as standard delimiters.

Note that when importing from or exporting to ASCII, Spotfire S+ truncates column names to 256 characters.

dBASE Files

When importing dBASE and dBASE-compatible files, the file name and file type are often the only things you need to specify. (Column names and data types are obtained from the dBASE file.) However, you can select a rectangular subset of the data by specifying starting and ending columns and rows.

Files With Multiple Tables

An application that can support multiple tables or data sets (such as Informix, Microsoft Access, Microsoft SQL Server, Oracle, SAS, SigmaPlot, SYBASE) will support exporting multiple tables or data sets to a file. Spotfire S+ currently only supports importing the first table from the file unless the file type is ODBC.

Formatted ASCII (FASCII) Files

You can use FASCII import to specify how each character in the imported file should be treated. For example, you must use FASCII for fixed-width columns not separated by delimiters if the rows in the file are not separated by line feeds or if the file splits each row of data into two or more lines.

Column names cannot be read from a FASCII data file. If you want to name the columns, type a list of names, separated by any of the delimiters specified in the **Delimiter** field, in the **Alt col names** field. For each imported column, specify one column name (for example, **Apples, Oranges, Pears**). You can use an asterisk (*) to denote a missing name (for example, **Apples, *, Pears**).

If each row ends with a new line, Spotfire S+ treats it as a single, character-wide variable that is to be skipped.

If you want to import only some of the rows, specify a starting and ending row.

Format Strings

Format strings are used when importing data from, or exporting data to, fixed-format ASCII (FASCII) text files. A format string specifies how each character in the imported file should be treated. You must use a format string, together with the FASCII file type, if the columns in the data file are not separated by delimiters.

Format strings for importing data

When importing data from a FASCII file, a valid format string consists of a percent (%) sign followed by the data type for each column in the file. Available data types are:

- s, which denotes a character string,
- f, which denotes a numeric value, and
- the asterisk (*), which denotes a skipped column.

One of the characters specified in the **Delimiter** field must separate each specification in the string. For example, the format string

```
%s, %f, %*, %f
```

imports the first column of the data file as type `character` and the second and fourth columns as type `numeric` and skips the third column altogether.

If you specify a variable to be type `numeric` and the value of any cell cannot be interpreted as a number, that cell is filled with a missing value. Incomplete rows are also filled with missing values.

Note

Some dates in text files may be imported automatically as numbers. After importing data that contain dates, you should check the class of each column and, if necessary, change it to the appropriate data type.

Format strings and field width specifications are irrelevant for regular ASCII files and are therefore ignored. For FASCII files, however, you can specify an integer that defines the width of each field. For example, the format string

```
%4f, %6s, %3*, %6f
```

imports the first four entries in each row as a numeric column. The next six entries in each row are read as characters, the next three are skipped, and then six more entries are imported as another numeric column.

Format strings for exporting data

When exporting data to a FASCII file, the syntax accepted by the **Format string** field is similar to that for importing data. However, in addition to the data type, the precision of numeric values can also be specified. For example, the format string

```
%3, %7.2, %4, %5.2
```

exports the first and third columns as whole numbers of three and four digits, respectively. The second and fourth columns each have two decimal digits of precision.

If a precision value is not specified, it is assumed to be zero; if you supply a precision value for a character column, it is ignored. Note that when exporting row names, the first entry in the format string is reserved for the row names.

Specifying a format string can potentially speed up the export of data sets that have many character columns. If you do not include a format string, Spotfire S+ must check the width of every entry in a character or factor column and determine a width large enough for all values in the column. Since many of the supported file types use fixed widths, considerable space can be saved by specifying a narrow width for character columns that have many short values and only a few long values. With this approach, the few long values are truncated.

Informix Files

All imports from and exports to Informix files are done using ODBC so the various ODBC components must be properly installed.

Lotus Files

If your Lotus-type worksheet contains numeric data only in a rectangular block, starting in the first row and column of the worksheet, then all you need to specify is the file name and file type. If a row contains column names, specify the number of that row in the **Col names row** field (it does not have to be the first row). You can select a rectangular subset of the worksheet by specifying starting and ending columns and rows. Lotus-style column names (for example, **A**, **AB**) can be used to specify the starting and ending columns.

The row specified as the starting row is always read first to determine the data types of the columns. Therefore, there cannot be any blank cells in this row. In other rows, blank cells are filled with missing values.

Microsoft Access Files

All imports from and exports to Access files are done using ODBC, so the various ODBC components must be properly installed.

Microsoft Excel Files

If your Excel worksheet contains numeric data only in a rectangular block, starting in the first row and column of the worksheet, then all you need to specify is the file name and file type. If a row contains column names, specify the number of that row in the **Col names row** field (it does not have to be the first row). You can select a rectangular subset of the worksheet by specifying starting and ending columns and rows. Excel-style column names (for example, **A**, **AB**) can be used to specify the starting and ending columns.

Note that when importing from or exporting to Excel, Spotfire S+ truncates column names to 256 characters.

Oracle Files

All imports from and exports to Oracle files are done using ODBC so the various ODBC components must be properly installed.

When exporting to Oracle, table names and column names must be in UPPERCASE.

SYBASE Files

All imports from and exports to SYBASE files are done using ODBC so the various ODBC components must be properly installed.

STATISTICS

6

INTRODUCTION

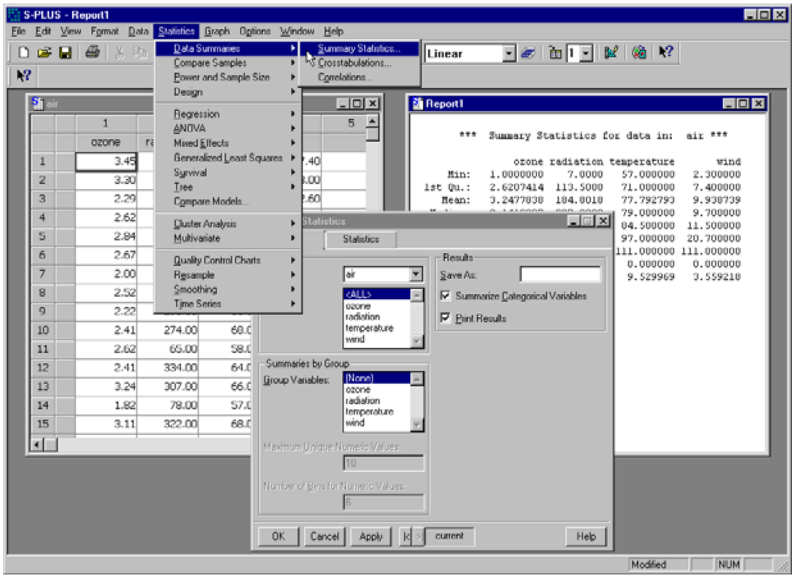
The power of Spotfire S+ comes from the integration of its graphics capabilities with its statistical analysis routines. In other chapters throughout this manual, we introduce Spotfire S+ graphics. In this chapter, we show how statistical procedures are performed in Spotfire S+.

It is not necessary to read this entire chapter before you perform a statistical analysis. Once you've acquired a basic understanding of the way statistics are performed, you can refer directly to a section of interest.

We begin this chapter by presenting general information on using the statistics dialogs, and devote the remaining sections to descriptions and examples for each of these dialogs.

Overview

Figure 6.1 displays many elements of the Spotfire S+ interface.



	1			5
	ozone	ra		
1	3.45		.40	
2	3.30		.00	
3	2.29		.60	
4	2.62			
5	2.84			
6	2.67			
7	2.00			
8	2.52			
9	2.22			
10	2.41	274.00	68.0	
11	2.62	65.00	58.0	
12	2.41	334.00	64.0	
13	3.24	307.00	66.0	
14	1.82	78.00	57.0	
15	3.11	322.00	68.0	

air ▾
<ALL>
ozone
radiation
temperature
wind

Save As:
☑ Summarize Categorical Variables
☑ Print Results

Group Variables: (None)
ozone
radiation
temperature
wind

Maximum Unique Numeric Values: 10

Number of Bins for Numeric Values: 5

```
       ***  Summary Statistics for data in:  air ***

              ozone radiation temperature       wind
     Min:  1.0000000    7.0000   57.000000   2.300000
 1st Qu.:  2.6207414  113.5000   71.000000   7.400000
    Mean:  3.2477038  184.8018   77.792793   9.938739
                                 79.000000   9.700000
                                 84.500000  11.500000
                                 97.000000  20.700000
                                111.000000 111.000000
                                  0.000000   0.000000
                                  9.529969   3.559218
```

Figure 6.1: *Statistics-related menus and windows.*

- **Statistics menu**: The **Statistics** menu gives you access to most of the statistical procedures available in Spotfire S+. The procedures are logically grouped, with submenus that allow you to precisely specify the procedure you want to use. For example, in Figure 6.1 the menu tree for summary statistics is shown. It is selected by choosing **Statistics ► Data Summaries ► Summary Statistics**.

- **Statistics dialogs**: The open dialog shown in Figure 6.1 entitled **Summary Statistics**, and is used to specify which data summaries to calculate.

- **Data menu** (not shown): The **Data** menu, located to the left of the **Statistics** menu, is used to access functions that generate and manipulate data.

- **Data Window**: The open window on the left in Figure 6.1 is a **Data** window, which you can use to create or edit a data set. See Chapter 2, Working With Data, for a detailed introduction to the **Data** window.

- **Report Window**: The **Report** window displays the results of a statistical analysis. In the example in Figure 6.1, a **Report** window shows the results of the summary statistics.

- **Graph Sheet** (not shown): A **Graph Sheet** displays the graphics created from the statistics menus.

- **Message Window** (not shown): A **Message** window appears only if an error, warning, or informational message is generated by a statistics procedure. If you close a **Message** window, it reappears the next time an informational message is generated. You should regularly examine the contents of the **Message** window to ensure that nothing out of the ordinary occurs during your statistical analysis.

Basic Procedure

The basic procedure for analyzing data is the same regardless of the type of analysis.

1. Select the data you want to work with.
2. Choose the statistical procedure (summary statistics, linear regression, ANOVA, etc.) you want to perform from the **Statistics** menu. The dialog corresponding to that procedure opens.
3. Select the data set, variables, and options for the procedure you have chosen. (These are slightly different for each dialog.) Click the **OK** or **Apply** button to conduct the analysis. If you click **OK**, the dialog closes when the graph is generated; if you click **Apply**, the dialog remains open.
4. Check for messages. If a message is generated, it appears in a **Message** window. If no **Message** window opens, then no message was generated.
5. Check the result. If everything went well, the results of your analysis are displayed in a **Report** window. Some statistics procedures also generate plots.

If you want, you can change the variables, parameters, or options in the dialog and click **Apply** to generate new results. Spotfire S+ makes it easy to experiment with options and to try variations on your analysis.

Dialogs

Most of the statistical functionality of Spotfire S+ can be accessed through the **Data** and **Statistics** menus.

The **Data** menu includes dialogs for tabulating data, calculating distribution functions, and generating random samples and random numbers. The **Data** menu also includes dialogs for manipulating data, including sorting, stacking, and transforming data sets. See Chapter 2, Working With Data for detailed information.

The **Statistics** menu includes dialogs for creating data summaries and fitting statistical models. Many of the dialogs consist of tabbed pages that allow for a complete analysis, including model fitting, plotting, and prediction. Each dialog has a corresponding function that is executed using dialog inputs as values for function arguments. Usually, it is only necessary to fill in a few fields on the first page of a tabbed dialog to launch the function call.

Dialog Fields

Many dialogs include a **Data Set** field. This field is automatically filled in with the name of the data set most recently opened with either **File ► Open** or the **Select Data** dialog. To specify another data set, you can either type its name directly in the **Data Set** field, or make a selection from the dropdown list. The data sets that appear in the dropdown list are limited to those that have been filtered by an **Object Explorer**.

Most dialogs that fit statistical models include a **Subset Rows** field that you can use to specify only a portion of a data set. To use a subset of your data in an analysis, enter an S-PLUS expression in the **Subset Rows** field that identifies the rows to use. The expression can evaluate to a vector of logical values: true values indicate which rows to include in the analysis, and false values indicate which rows to drop. Alternatively, the expression can specify a vector of row indices. For example:

- The expression `Species=="bear"` includes only rows for which the `Species` column contains `bear`.
- The expression `Age>=13 & Age<20` includes only rows that correspond to teenage values of the `Age` variable.
- The expression `1:20` includes the first 20 rows of the data.

To use all rows in a data set, leave the **Subset Rows** field blank.

Some dialogs have **Variables** fields. These fields are automatically filled in with the column names in the data set you have selected.

Some dialogs require a **Formula**, which is automatically filled in if you have selected columns of a data set. The first selected column is the response, and the remaining columns are the predictors. If you do not want the formula that automatically appears, you can type another one directly in the **Formula** field, or click the **Create Formula** button to bring up a dialog that builds a formula for you. Some dialogs, such as the **Generalized Additive Models** dialog, require special formulas; in these cases, the special terms available are listed in the **Formula Builder**.

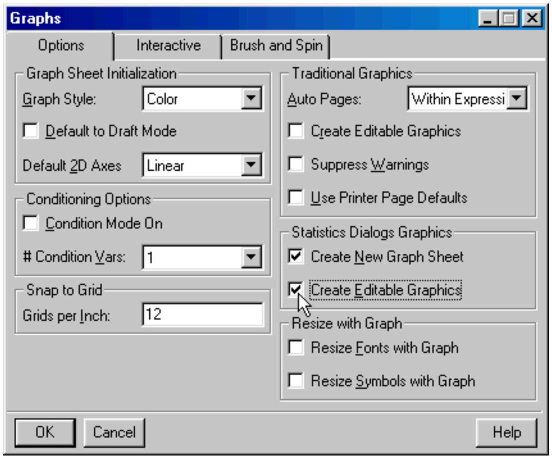
Most dialogs have a **Save As** field that corresponds to the name of the object in which the results of the analysis are saved. This object may be manipulated in the **Object Explorer** to obtain additional summaries or plots after the model has been fit. Many of the modeling dialogs also have one or more **Save In** fields. The **Save In** field corresponds to the name of a data set in which new columns are saved. Examples of new columns include fitted values, residuals, predictions, and standard errors.

Plotting From the Statistics Dialogs

Most of the statistics dialogs produce default plots that are appropriate for the analysis. Many have several plot options, usually on a separate **Plot** tab.

By default, plots produced from the statistics dialogs are not editable. If you prefer, you can change the default behavior for statistics dialogs from traditional to editable graphics:

1. From the main menu, choose **Options ▶ Graph Options**. The **Graphs** dialog opens, as shown in Figure 6.2.
2. Check the **Create Editable Graphics** option in the **Statistics Dialogs Graphics** group.
3. Click **OK**.



Graph Sheet Initialization

Graph Style: Color

□ Default to Draft Mode

Default 2D Axes: Linear

Conditioning Options

□ Condition Mode On

Condition Vars: 1

Snap to Grid

Grids per Inch: 12

Traditional Graphics

Auto Pages: Within Expressi

□ Create Editable Graphics

□ Suppress Warnings

□ Use Printer Page Defaults

Statistics Dialogs Graphics

☑ Create New Graph Sheet

☑ Create Editable Graphics

Resize with Graph

□ Resize Fonts with Graph

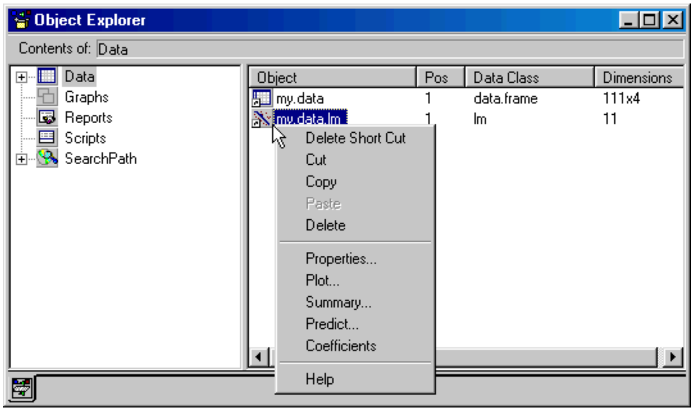
□ Resize Symbols with Graph

Figure 6.2: *The **Options** page of the **Graphs** dialog.*

For faster performance, we recommend creating complicated plots such as multipanel Trellis displays with traditional graphics. To convert a non-editable graph into an editable one, right-click the data part of the graph and select **Convert to Objects** from the context menu.

Saving Results From an Analysis

A statistical model object may be created by specifying a name for the object in the **Save As** field of a dialog. Once the execution of a dialog function completes, the object shows up in the **Object Explorer**. Double-clicking on the object either displays results in a **Data** window or prints a summary for the object. For model objects such as the results from a linear regression, right-click context menus are available. To display the related menus, right-click the model object in the **Object Explorer**. Most menu choices correspond to the tabbed pages from the dialog. This allows you to do plotting and prediction for a model without relaunching an entire dialog. An example for a linear model object is shown in Figure 6.3.



Contents of: Data

Object	Pos	Data Class	Dimensions
my.data	1	data.frame	111x4
my.data.lm	1	lm	11

Figure 6.3: *The right-click context menu shown for a linear model object.*

SUMMARY STATISTICS

One of the first steps in analyzing data is to create summaries. This can be done numerically through the **Summary Statistics**, **Crosstabulations**, and **Correlations and Covariances** dialogs.

- **Summary Statistics:** calculates summary statistics, such as the mean, median, variance, total sum, quartiles, etc.
- **Crosstabulations:** tabulates the number of cases for each combination of factors between your variables, and generates statistics for the table.
- **Correlations:** calculates correlations or covariances between variables.

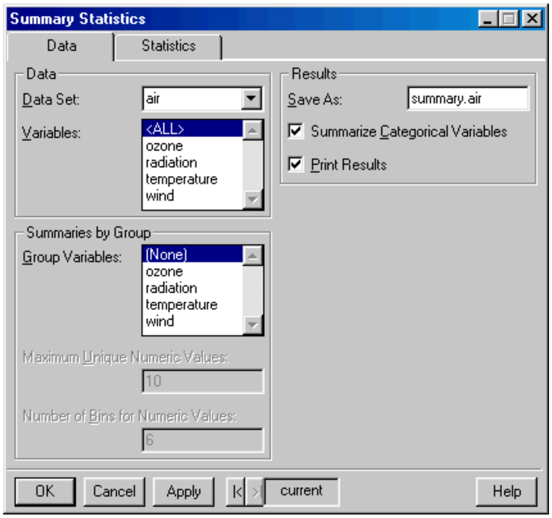
These three procedures can be found under the **Statistics ▶ Data Summaries** menu. In addition, the **Data ▶ Tabulate** dialog provides a tabular summary of data and also creates a data set convenient for use in Trellis graphs.

Summary Statistics

The **Summary Statistics** dialog provides basic univariate summaries for continuous variables, and it provides counts for categorical variables. Summaries may be calculated within groups based on one or more grouping variables.

Computing summary statistics

From the main menu, choose **Statistics ▶ Data Summaries ▶ Summary Statistics**. The **Summary Statistics** dialog opens, as shown in Figure 6.4.



Data

Data Set: air

Variables: <ALL> ozone radiation temperature wind

Results

Save As: summary.air

☑ Summarize Categorical Variables

☑ Print Results

Summaries by Group

Group Variables: (None) ozone radiation temperature wind

Maximum Unique Numeric Values: 10

Number of Bins for Numeric Values: 6

Figure 6.4: *The **Summary Statistics** dialog.*

Example

We use the data set `air`. This data set measures the ozone concentration, wind speed, temperature, and radiation of 111 consecutive days in New York. In this example, we calculate summary statistics for these data.

1. Open the **Summary Statistics** dialog.
2. Type `air` in the **Data Set** field.
3. Select the variables you want summary statistics for in the **Variables** field. For this example, we choose **<ALL>** (the default).
4. We want to print the results in a **Report** window and store the results in a model object. Enter `summary.air` in the **Save As** field to create an object of this name in which to store the results. Spotfire S+ overwrites any existing variable with this name without warning. Make sure that the **Print Results** check box is selected to ensure that the results are printed in a **Report** window.

5. Click on the **Statistics** tab to see the statistics available. For this example, select the **Variance** and **Total Sum** check boxes.

6. Click **OK**. A **Report** window is created with the following output:

```
      *** Summary Statistics for data in:  air ***

             ozone radiation temperature     wind
       Min:   1.00      7.00       57.00     2.30
   1st Qu.:   2.62    113.50       71.00     7.40
      Mean:   3.25    184.80       77.79     9.94
    Median:   3.14    207.00       79.00     9.70
   3rd Qu.:   3.96    255.50       84.50    11.50
       Max:   5.52    334.00       97.00    20.70
   Total N: 111.00    111.00      111.00   111.00
     NA's :   0.00      0.00        0.00     0.00
 Variance:    0.79   8308.74       90.82    12.67
 Std Dev.:    0.89     91.15        9.53     3.56
       Sum: 360.50  20513.00     8635.00  1103.20
```

7. If the above output is not displayed in a **Report** window, check the **Message** window for error messages and correct any problems that are reported.

8. To access the model object containing the results, use the **Object Explorer**. To open the **Object Explorer**, click the **Object Explorer** button on the **Standard** toolbar.

9. Highlight the **Data** folder. In the right pane, double-click the new data matrix called `summary.air` (the name we specified in Step 7 above). This loads the summary statistics into a **Data** window.

We are done. As you can see, calculating summary statistics is straightforward. Other statistical procedures use the same basic steps that we did in this example.

Crosstabulations

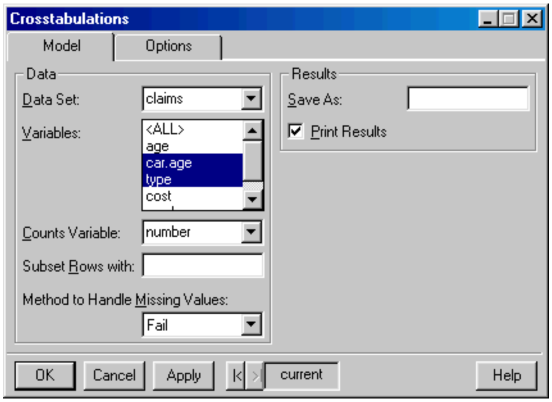
The **Crosstabulations** dialog produces a table of counts for all combinations of specified categorical (factor) variables. In addition, it calculates cell percentages and performs a chi-square test for independence. The **Crosstabulations** dialog returns results in an ASCII formatted table.

The chi-square test for independence is useful when the data consist of the number of occurrences of an outcome for various combinations of categorical covariates. It is used to determine whether the number of occurrences is due to the marginal values of the covariates, or whether it is influenced by an interaction between covariates.

To construct a table of counts for use in further analysis, use the **Tabulate** dialog available from the **Data** menu.

Computing crosstabulations

From the main menu, choose **Statistics** ▶ **Data Summaries** ▶ **Crosstabulations**. The **Crosstabulations** dialog opens, as shown in Figure 6.5.



Data Set: claims

Variables: <ALL>, age, car.age, type, cost

Counts Variable: number

Subset Rows with:

Method to Handle Missing Values: Fail

Save As:

☑ Print Results

Figure 6.5: *The **Crosstabulations** dialog.*

Example

Consider the data set `claims`, which has the components `age`, `car.age`, `type`, `cost`, and `number`. The original data were taken from 8,942 insurance claims. The 128 rows of the `claims` data set represent all possible combinations of the three predictor variables (columns) age, car.age, and type. An additional variable, number, gives the number of claims in each cell. The outcome variable, cost, is the average cost of the claims.

We can use a contingency table to examine the distribution of the number of claims by car age and type. The corresponding test for independence tells us whether the effect of age upon the likelihood of a claim occurring varies by car type, or whether the effects of car age and type are independent.

To construct a contingency table for the claims data:

1. Open the **Crosstabulations** dialog.
2. Type claims in the **Data Set** field.
3. In the **Variables** field, click on car.age and then CTRL-click type. This selects both variables for the analysis.
4. In the **Counts Variable** field, scroll through the list of variables and select number.
5. Click **OK**.

The table below appears in the **Report** window.

```
         *** Crosstabulations ***
Call:
crosstabs(formula = number ~ car.age + type, data =
  claims, na.action = na.fail, drop.unused.levels = T)
8942 cases in table
+----------+
|N         |
|N/RowTotal|
|N/ColTotal|
|N/Total   |
+----------+
car.age|type
       |A      |B      |C      |D      |RowTotl|
-------+-------+-------+-------+-------+-------+
0-3    | 391   |1538   |1517   | 688   |4134   |
       |0.0946 |0.3720 |0.3670 |0.1664 |0.462  |
       |0.3081 |0.3956 |0.5598 |0.6400 |       |
       |0.0437 |0.1720 |0.1696 |0.0769 |       |
-------+-------+-------+-------+-------+-------+
4-7    | 538   |1746   | 941   | 324   |3549   |
       |0.1516 |0.4920 |0.2651 |0.0913 |0.397  |
       |0.4240 |0.4491 |0.3472 |0.3014 |       |
       |0.0602 |0.1953 |0.1052 |0.0362 |       |
-------+-------+-------+-------+-------+-------+
8-9    | 187   | 400   | 191   |  44   |822    |
       |0.2275 |0.4866 |0.2324 |0.0535 |0.092  |
       |0.1474 |0.1029 |0.0705 |0.0409 |       |
       |0.0209 |0.0447 |0.0214 |0.0049 |       |
-------+-------+-------+-------+-------+-------+
10+    | 153   | 204   |  61   |  19   |437    |
       |0.3501 |0.4668 |0.1396 |0.0435 |0.049  |
       |0.1206 |0.0525 |0.0225 |0.0177 |       |
       |0.0171 |0.0228 |0.0068 |0.0021 |       |
-------+-------+-------+-------+-------+-------+
ColTotl|1269   |3888   |2710   |1075   |8942   |
       |0.14   |0.43   |0.30   |0.12   |       |
-------+-------+-------+-------+-------+-------+
Test for independence of all factors
  Chi^2 = 588.2952 d.f.= 9 (p=0)
  Yates' correction not used
```

Each cell in the table contains the number of claims for that car age and type combination, along with the row percentage, column percentage, and total percentage of observations falling in that cell. The results of the test for independence indicate that the percentage of observations in each cell is significantly different from the product of the total row percentage and total column percentage. Thus, there is an interaction between the car age and type, which influences the number of claims. That is, the effect of car age on the number of claims varies by car type.

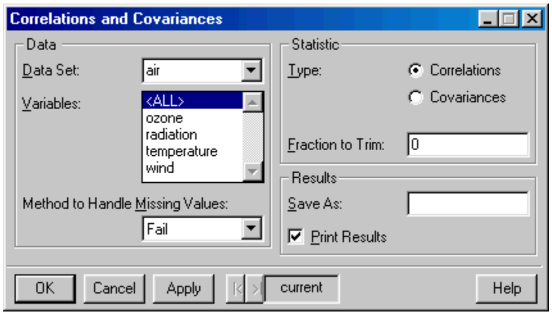
The **Crosstabulations** dialog is most useful for examining row and column percentages and performing a test for independence. To create a simpler table of data, use the **Tabulate** dialog as discussed on page 211.

Correlations

The **Correlations and Covariances** dialog produces the basic bivariate summaries of correlations and covariances.

Computing correlations and covariances

From the main menu, choose **Statistics ▶ Data Summaries ▶ Correlations**. The **Correlations and Covariances** dialog opens, as shown in Figure 6.6.



Data Set: air

Variables: <ALL> ozone radiation temperature wind

Method to Handle Missing Values: Fail

Type: ● Correlations ○ Covariances

Fraction to Trim: 0

Save As:

☑ Print Results

Figure 6.6: *The **Correlations and Covariances** dialog.*

Example

In Summary Statistics on page 204, we looked at univariate summaries of the data set `air`. We now generate the correlations between all four variables of the data set. Here are the basic steps:

1. Open the **Correlations and Covariances** dialog.
2. Type `air` in the **Data Set** field.
3. Choose **<ALL>** in the **Variables** field.
4. Click **OK**.

The **Report** window displays the correlations between the four variables:

```
          ***  Correlations for data in:  air ***

                   ozone  radiation temperature       wind
      ozone  1.0000000  0.4220130   0.7531038 -0.5989278
  radiation  0.4220130  1.0000000   0.2940876 -0.1273656
temperature  0.7531038  0.2940876   1.0000000 -0.4971459
       wind -0.5989278 -0.1273656  -0.4971459  1.0000000
```

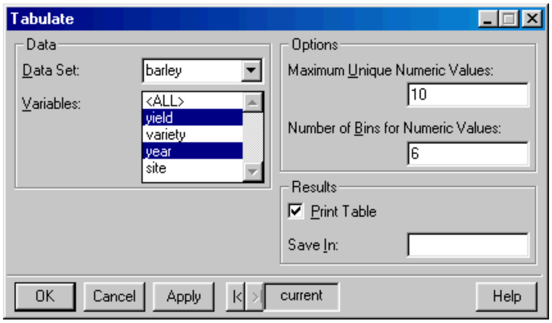
Note the strong correlation of 0.75 between `ozone` and `temperature`: as temperature increases, so do the ozone readings. The negative correlation of -0.60 between `ozone` and `wind` indicates that ozone readings decrease as the wind speed increases. Finally, the correlation of -0.50 between `wind` and `temperature` indicates that the temperature decreases as the wind increases (or that the temperature increases as the wind decreases).

Tabulate

The **Tabulate** dialog creates a tabular summary of data from a data set.

Creating a table

From the main menu, choose **Data** ▶ **Tabulate**. The **Tabulate** dialog opens, as shown in Figure 6.7.



Data Set: barley

Variables: <ALL>
yield
variety
year
site

Maximum Unique Numeric Values: 10

Number of Bins for Numeric Values: 6

☑ Print Table

Save In:

Figure 6.7: *The **Tabulate** dialog.*

Example

The `barley` data set contains observations from a 1930s agricultural field trial that studied barley crops. At six sites in Minnesota, ten varieties of barley were grown for each of two years, 1931 and 1932. The data are the yields for all combinations of site, variety, and year, so there are a total of $6 \times 10 \times 2 = 120$ observations. Chapter 3, Exploring Data, examines these data in a Trellis plot. In this example, we tabulate the data in a variety of ways.

To tabulate the `barley` data:

1. Open the **Tabulate** dialog.
2. Type `barley` in the **Data Set** field.
3. Click the variable `yield` and then CTRL-click to select `year` (the order of selection is important).
4. Click **OK**.

The table below appears in a **Report** window.

```
       *** Table of yield,year in barley ***

                        1932 1931
13.92000+ thru 22.64667   13    2
22.64667+ thru 31.37334   18   20
31.37334+ thru 40.10002   17   17
40.10002+ thru 48.82669   10   13
48.82669+ thru 57.55336    1    4
57.55336+ thru 66.28003    1    4
```

The yield has been divided into six “bins.” Note how the yield tends to be higher in year 1931 than in year 1932.

More than two variables can be selected in the **Tabulate** dialog. For example, try selecting `yield`, `year`, and `variety` (in that order) to further subdivide the table into the ten varieties of barley.

COMPARE SAMPLES

One-Sample Tests

Spotfire S+ supports a variety of statistical tests for testing a hypothesis about a single population. Most of these tests involve testing a parameter against a hypothesized value. That is, the null hypothesis has the form $H_0\colon \Theta = \Theta_0$, where Θ is the parameter of interest and Θ_0 is the hypothesized value of our parameter.

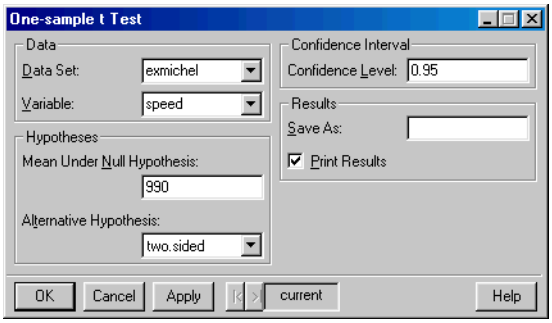
- **One-sample *t* test:** a test for the population mean μ. We test if the population mean is a certain value. For small data sets, we require that the population have a normal distribution.
- **One-sample Wilcoxon signed-rank test:** a nonparametric test for the population mean μ. As with the t test, we test if the population mean is a certain value, but we make no distributional assumptions.
- **One-sample Kolmogorov-Smirnov goodness-of-fit test:** a test to determine if the data come from a hypothesized distribution. This is the preferred goodness-of-fit test for a continuous variable.
- **One-sample chi-square goodness-of-fit test:** a test to see if the data come from a hypothesized distribution. This is the preferred goodness-of-fit test for a discrete variable.

One-Sample t Test

A *one-sample t test* is used to test whether the mean for a variable has a particular value. The main assumption in a t test is that the data come from a Gaussian (normal) distribution. If this is not the case, then a nonparametric test, such as the Wilcoxon signed-rank test, may be a more appropriate test of location.

Performing a one-sample t test

From the main menu, choose **Statistics ► Compare Samples ► One Sample ► t Test**. The **One-sample t Test** dialog opens, as shown in Figure 6.8.



One-sample t Test

Data
Data Set: exmichel
Variable: speed

Hypotheses
Mean Under Null Hypothesis: 990
Alternative Hypothesis: two.sided

Confidence Interval
Confidence Level: 0.95

Results
Save As:
☑ Print Results

Figure 6.8: *The **One-sample t Test** dialog.*

Example

In 1876, the French physicist Cornu reported a value of 299,990 km/sec for c, the speed of light. In 1879, the American physicist A.A. Michelson carried out several experiments to verify and improve Cornu's value. Michelson obtained the following 20 measurements of the speed of light:

```
  850   740   900  1070   930   850   950   980   980   880
 1000   980   930   650   760   810  1000  1000   960   960
```

To obtain Michelson's actual measurements, add 299,000 km/sec to each of the above values. In Chapter 3, Exploring Data, we created an `exmichel` data set containing the Michelson data.

The 20 observations can be thought of as observed values of 20 random variables with a common but unknown mean-value location μ. If the experimental setup for measuring the speed of light is free of bias, then it is reasonable to assume that μ is the true speed of light. In evaluating these data, we seek answers to at least four questions:

1. What is the speed of light μ?
2. Has the speed of light changed relative to our best previous value $\mu_0 = 299,990$ km/sec?
3. What is the uncertainty associated with our answers to (1) and (2)?
4. What is the shape of the distribution of the data?

The first three questions were probably in Michelson's mind when he gathered his data. The last two must be answered to determine which techniques can be used to obtain valid statistical inferences from the data. For example, if the shape of the distribution indicates a nearly normal distribution without outliers, we can use the Student's t tests to assist in answering question (2). If the data contain outliers or are far from normal, we should use a robust method or a nonparametric method, such as the Wilcoxon signed-rank test. In this section, we use Spotfire S+ to carefully analyze the Michelson data. Identical techniques can be used to explore and analyze any set of one-sample data.

Exploratory data analysis

To obtain a useful exploratory view of the Michelson data, create the following four plots: a boxplot, a histogram, a density plot, and a QQ normal plot. In Chapter 3, we created plots similar to the ones shown in Figure 6.9 to graphically analyze the Michelson data.

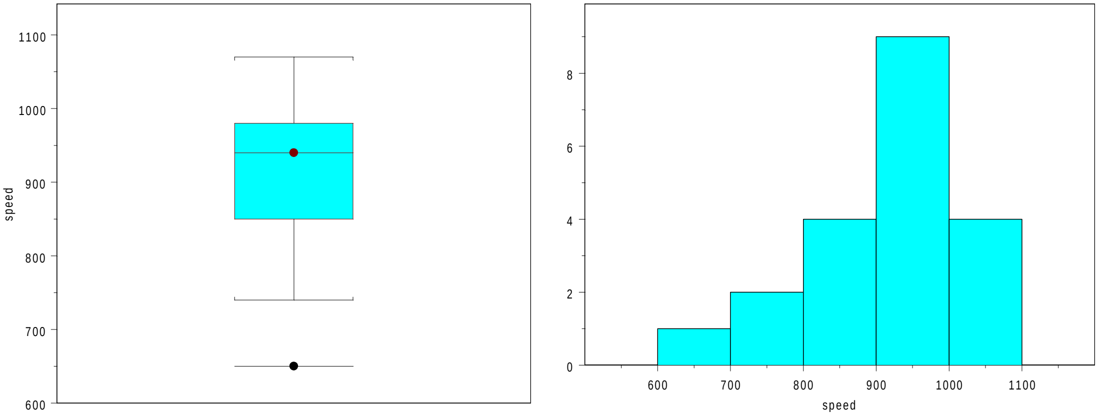


Figure 6.9: *Exploratory data analysis plots for the Michelson data.*

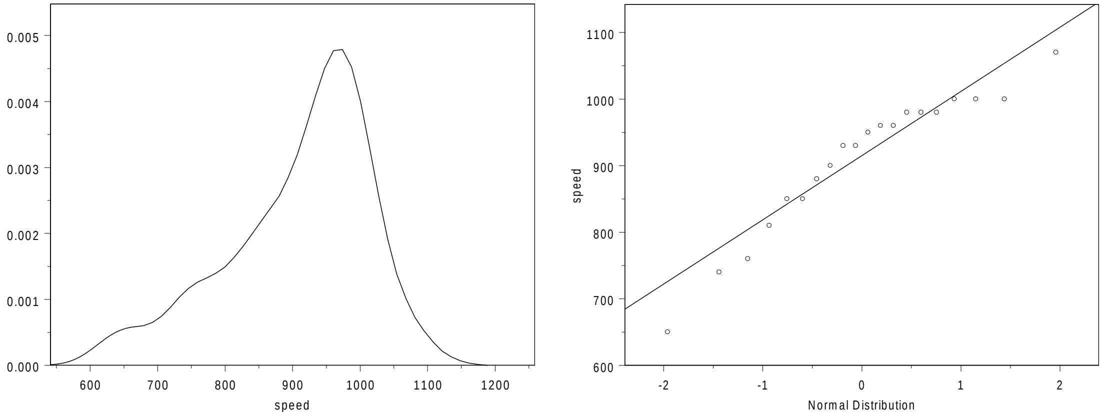


Figure 6.9: *Exploratory data analysis plots for the Michelson data. (Continued)*

We want to evaluate the shape of the distribution to see if our data are normally distributed. These plots reveal a distinctly skewed distribution toward the left (that is, toward smaller values). The distribution is thus not normal and probably not even "nearly" normal. We should therefore not use Student's t test for our statistical inference, since it requires normality for small samples.

The solid horizontal line in the box plot is located at the *median* of the data, and the upper and lower ends of the box are located at the *upper* and *lower quartiles* of the data, respectively. To obtain precise values for the median and quartiles, use the **Summary Statistics** dialog.

1. Open the **Summary Statistics** dialog.
2. Enter `exmichel` as the **Data Set**.
3. Click on the Statistics tab, and deselect all options except **Mean**, **Minimum**, **First Quartile**, **Median**, **Third Quartile**, and **Maximum**.
4. Click **OK**. The output appears in the **Report** window.

```
*** Summary Statistics for data in:  exmichel ***

              speed
     Min:   650.000
 1st Qu.:   850.000
    Mean:   909.000
  Median:   940.000
```

```
3rd Qu.:  980.000
    Max: 1070.000
```

The summary shows, from top to bottom, the smallest observation, the first quartile, the mean, the median, the third quartile, and the largest observation. From this summary, you can compute the *interquartile range*, $IQR = 3Q - 1Q$. The interquartile range provides a useful criterion for identifying outliers: any observation that is more than 1.5 3 IQR above the third quartile or below the first quartile is a suspected outlier.

Statistical inference

Because the Michelson data are probably not normal, you should use the Wilcoxon signed-rank test for statistical inference, rather than the Student's t test. For illustrative purposes, we use both.

To compute Student's t confidence intervals for the population mean-value location parameter μ, we use the **One-sample t Test** dialog. This dialog also computes Student's t significance test p values for the parameter $\mu_0 = 299, 990$.

1. Open the **One-sample t Test** dialog.
2. Type `exmichel` in the **Data Set** field.
3. Select `speed` as the **Variable**.
4. Suppose you want to test the null hypothesis value $\mu_0 = 990$ (plus 299,000) against a two-sided alternative, and you want to construct 95% confidence intervals. Enter 990 as the **Mean Under Null Hypothesis**.
5. Click **OK**.

The results of the one-sample t-test appear in the **Report** window.

```
     One-sample t-Test

data:  speed in exmichel
t = -3.4524, df = 19, p-value = 0.0027
alternative hypothesis: true mean is not equal to 990
95 percent confidence interval:
 859.8931 958.1069
sample estimates:
```

```
mean of x
      909
```

The computed mean of the Michelson data is 909, and the *p* value is 0.0027, which is highly significant. Clearly, Michelson's average value of 299,909 km/sec for the speed of light is significantly different from Cornu's value of 299,990 km/sec.

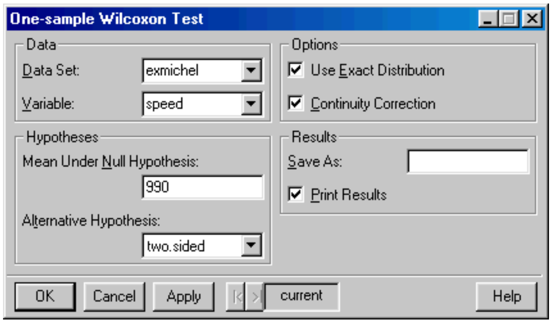
Spotfire S+ returns other useful information besides the *p* value, including the *t* statistic value, the degrees of freedom, the sample mean, and the confidence interval.

One-Sample Wilcoxon Signed-Rank Test

The *Wilcoxon signed-rank test* is used to test whether the median for a variable has a particular value. Unlike the one-sample *t* test, it does not assume that the observations come from a Gaussian (normal) distribution.

Performing a one-sample Wilcoxon signed-rank test

From the main menu, choose **Statistics ▶ Compare Samples ▶ One Sample ▶ Wilcoxon Signed Rank Test**. The **One-sample Wilcoxon Test** dialog opens, as shown in Figure 6.10.



Data Set: exmichel
Variable: speed
☑ Use Exact Distribution
☑ Continuity Correction
Mean Under Null Hypothesis: 990
Alternative Hypothesis: two.sided
Save As:
☑ Print Results

Figure 6.10: *The* ***One-sample Wilcoxon Test*** *dialog.*

Example

In One-Sample t Test on page 213, we performed a *t* test on the Michelson data. The test concludes that Michelson's average value for the speed of light (299,909 km/sec) is significantly different from Cornu's value of 299,990 km/sec. However, we have noted that the data may not be normal, so the results of the t test are suspect. We now conduct a Wilcoxon signed-rank test to see if the two values for the speed of light differ significantly from each other.

1. Open the **One-sample Wilcoxon Test** dialog.
2. Type `exmichel` in the **Data Set** field.
3. Select `speed` as the **Variable**.
4. Enter 990 as the **Mean Under Null Hypothesis**.
5. Click **OK**.

The **Report** window shows:

```
         Wilcoxon signed-rank test

data:  speed in exmichel
signed-rank normal statistic with correction Z = -3.0715,
  p-value = 0.0021
alternative hypothesis: true mu is not equal to 990
```

You may also receive a warning message that there are duplicate values in the variable `speed`. You can ignore this message. The p value of 0.0021 is close to the t test p value of 0.0027 for testing the same null hypothesis with a two-sided alternative. Thus, the Wilcoxon signed-rank test confirms that Michelson's average value for the speed of light of 299,909 km/sec is significantly different from Cornu's value of 299,990 km/sec.

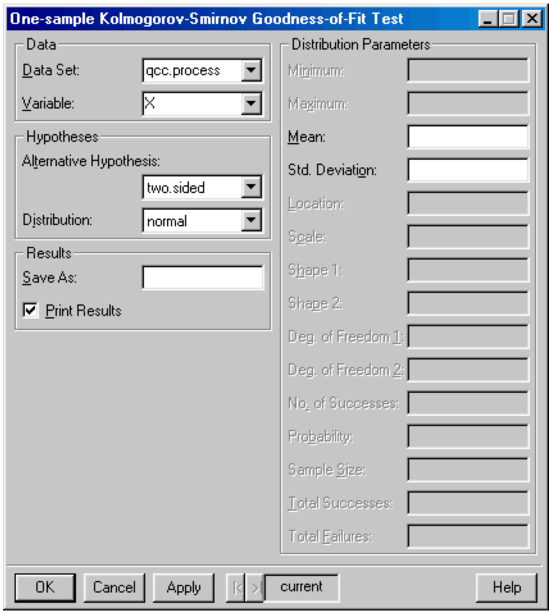
Kolmogorov-Smirnov Goodness-of-Fit

The *Kolmogorov-Smirnov goodness-of-fit test* is used to test whether the empirical distribution of a set of observations is consistent with a random sample drawn from a specific theoretical distribution. It is generally more powerful than the chi-square goodness-of-fit test for continuous variables. For discrete variables, the chi-square test is generally preferable.

If parameter values for the theoretical distribution are not available, they may be estimated from the observations automatically as part of the test for normal (Gaussian) or exponential distributions. For other distributions, the chi-square test must be used if parameters are to be estimated. In this case, the parameters are estimated from the data separately from the test, and then entered into the dialog.

Performing a one-sample Kolmogorov-Smirnov goodness-of-fit test

From the main menu, choose **Statistics** ▶ **Compare Samples** ▶ **One Sample** ▶ **Kolmogorov-Smirnov GOF**. The **One-sample Kolmogorov-Smirnov Goodness-of-Fit Test** dialog opens, as shown in Figure 6.11.



One-sample Kolmogorov-Smirnov Goodness-of-Fit Test

Data

Data Set: qcc.process

Variable: X

Hypotheses

Alternative Hypothesis: two.sided

Distribution: normal

Results

Save As:

☑ Print Results

Distribution Parameters

Mean:

Std. Deviation:

Figure 6.11: *The **One-sample Kolmogorov-Smirnov Goodness-of-Fit Test** dialog.*

Example

We create a data set called `qcc.process` that contains a simulated process with 200 measurements. Ten measurements per day were taken for a total of twenty days. We use the **Random Numbers** dialog to generate the data set from a Gaussian distribution. For more details on this dialog, see Random Numbers and Distributions on page 366.

1. Open an empty data set by clicking the **New Data Set** button on the **Standard** toolbar.

2. Select **Data ▶ Random Numbers** from the main menu. Verify that the name of the blank data set is in the **Data Set** field. Note that the **Distribution** is **normal** by default. Type 10 for the **Mean** and leave the **Std. Deviation** as 1.
3. Type `X` for the **Target Column** and 200 for the **Sample Size**. For reproducibility, we want to set the random number generator seed: type 21 in the **Set Seed with** field. Click **OK**. This step creates a column named `X` containing 200 elements that are randomly sampled from a Gaussian distribution.
4. Select **Data ▶ Fill** from the main menu. Verify that the name of the data set appears in the **Data Set** field. Type `Day` for the **Columns**, 20 as the **Length**, and 10 as the number of **Replications**. Select **Grouped Sequence** from the **Content** list and click **OK**. This step creates a column named `Day` containing the integers 1 through 20, each repeated 10 times. The `Day` column represents the day on which the simulated measurements were taken.
5. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `qcc.process` in the **Name** field and click **OK**.

We can use the Kolmogorov-Smirnov goodness-of-fit test to confirm that `qcc.process` is Gaussian:

1. Open the **One-sample Kolmogorov-Smirnov Goodness-of-Fit Test** dialog. The **Distribution** is **normal** by default.
2. Select `qcc.process` as the **Data Set**.
3. Select `X` as the **Variable**.
4. Click **OK**.

A summary of the goodness-of-fit test appears in the **Report** window. The *p* value of 0.5 indicates that we do not reject the hypothesis that the data are normally distributed. The summary also contains estimates of the mean and standard deviation for the distribution.

The **Message** window contains a warning indicating that the Dallal-Wilkinson approximation used in this test is most accurate for extreme *p* values (*p* values ≤ 0.1). Our actual calculated *p* value is 0.776, which is set to 0.5 in the summary to indicate that the null hypothesis is not rejected, but our estimate of the *p* value is not highly accurate.

Chi-Square Goodness-of-Fit

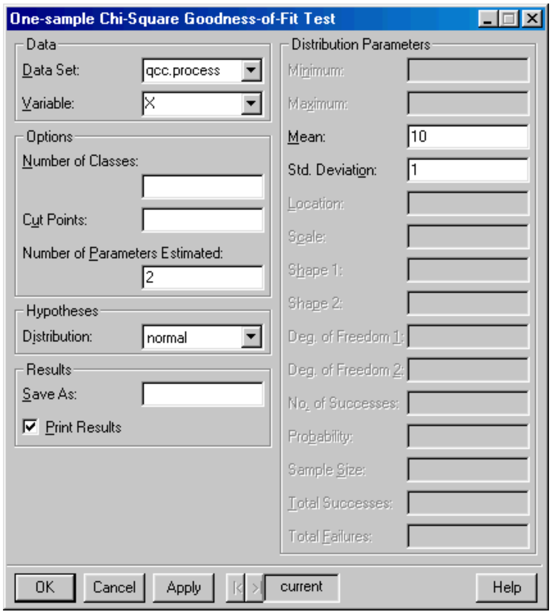
The *chi-square goodness-of-fit test* uses Pearson's chi-square statistic to test whether the empirical distribution of a set of observations is consistent with a random sample drawn from a specific theoretical distribution.

Chi-square tests apply to any type of variable: continuous, discrete, or a combination of these. If the hypothesized distribution is discrete and the sample size is large $(n > 50)$, the chi-square is the only valid test. In addition, the chi-square test easily adapts to the situation in which parameters of a distribution are estimated. However, for continuous variables, information is lost by grouping the data.

When the hypothesized distribution is continuous, the Kolmogorov-Smirnov test is more likely than the chi-square test to reject the null hypothesis when it should be rejected. The Kolmogorov-Smirnov test is more powerful than the chi-square test, and hence is preferred for continuous distributions.

Performing Pearson's chi-square test

From the main menu, choose **Statistics ► Compare Samples ► One Sample ► Chi-square GOF**. The **One-sample Chi-Square Goodness-of-Fit Test** dialog opens, as shown in Figure 6.12.



One-sample Chi-Square Goodness-of-Fit Test

Data

Data Set: qcc.process

Variable: X

Options

Number of Classes:

Cut Points:

Number of Parameters Estimated: 2

Hypotheses

Distribution: normal

Results

Save As:

☑ Print Results

Distribution Parameters

Minimum:

Maximum:

Mean: 10

Std. Deviation: 1

Location:

Scale:

Shape 1:

Shape 2:

Deg. of Freedom 1:

Deg. of Freedom 2:

No. of Successes:

Probability:

Sample Size:

Total Successes:

Total Failures:

Figure 6.12: *The* ***One-sample Chi-Square Goodness-of-Fit Test*** *dialog.*

Example

In the previous section, we created a data set called `qcc.process` that contains a simulated process with 200 measurements. Ten measurements per day were taken for a total of twenty days. We can use the chi-square goodness-of-fit test to confirm that `qcc.process` is Gaussian:

1. If you have not done so already, create the `qcc.process` data set with the instructions given on page 220.
2. Open the **One-sample Chi-Square Goodness-of-Fit Test** dialog. The **Distribution** is **normal** by default.
3. Select `qcc.process` as the **Data Set**.
4. Select `X` as the **Variable**.
5. For the chi-square test, we must specify parameter estimates for the mean and standard deviation of the distribution. Enter 10 as the **Mean** and 1 as the **Std. Deviation**. If you do not know good parameter estimates for your data, you can use the **Summary Statistics** dialog to compute them.

6. Since we are estimating the mean and standard deviation of our data, we should adjust for these parameter estimates when performing the goodness-of-fit test. Enter 2 as the **Number of Parameters Estimated**.

7. Click **OK**.

A summary of the goodness-of-fit test appears in the **Report** window.

Two-Sample Tests

Spotfire S+ supports a variety of statistical tests for comparing two population parameters. That is, we test the null hypothesis that $H_0\colon \Theta_1 = \Theta_2$, where Θ_1 and Θ_2 are the two population parameters.

- **Two-sample *t* test**: a test to compare two population means μ_1 and μ_2. For small data sets, we require that both populations have a normal distribution. Variations of the two-sample t test, such as the paired t test and the two-sample t test with unequal variances, are also supported.

- **Two-sample Wilcoxon test**: a nonparametric test to compare two population means μ_1 and μ_2. As with the t test, we test if $\mu_1 = \mu_2$, but we make no distributional assumptions about our populations. Two forms of the Wilcoxon test are supported: the signed rank test and the rank sum test.

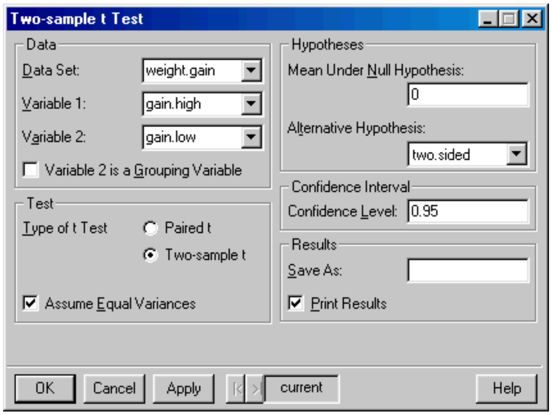
- **Kolmogorov-Smirnov goodness-of-fit test**: a test to determine whether two samples come from the same distribution.

Two-Sample t Test

The *two-sample t test* is used to test whether two samples come from distributions with the same means. This test handles both paired and independent samples. The samples are assumed to come from Gaussian (normal) distributions. If this is not the case, then a nonparametric test, such as the Wilcoxon rank sum test, may be a more appropriate test of location.

Performing a two-sample t test

From the main menu, choose **Statistics ▶ Compare Samples ▶ Two Samples ▶ t Test**. The **Two-sample t Test** dialog opens, as shown in Figure 6.13.



Two-sample t Test

Data

Data Set: weight.gain

Variable 1: gain.high

Variable 2: gain.low

☐ Variable 2 is a Grouping Variable

Test

Type of t Test: ○ Paired t ● Two-sample t

☑ Assume Equal Variances

Hypotheses

Mean Under Null Hypothesis: 0

Alternative Hypothesis: two.sided

Confidence Interval

Confidence Level: 0.95

Results

Save As:

☑ Print Results

Figure 6.13: *The **Two-sample t Test** dialog.*

Example

Suppose you are a nutritionist interested in the relative merits of two diets, one featuring high protein and the other featuring low protein. Do the two diets lead to differences in mean weight gain? Consider the data in Table 6.1, which shows the weight gains (in grams) for two lots of female rats under the two diets. The first lot, consisting of 12 rats, was given the high-protein diet, and the second lot, consisting of seven rats, was given the low-protein diet. These data appear in section 6.9 of Snedecor and Cochran (1980).

Table 6.1: *Weight gain data.*

High Protein	Low Protein
134	70
146	118
104	101
119	85

Table 6.1: *Weight gain data. (Continued)*

High Protein	Low Protein
124	107
161	132
107	94
83	
113	
129	
97	
123	

The high-protein and low-protein samples are presumed to have mean-value location parameters μ_H and μ_L, and standard deviation scale parameters σ_H and σ_L, respectively. While you are primarily interested in whether there is any difference in the mean values, you may also be interested in whether the two diets result in different variabilities, as measured by the standard deviations. This example shows you how to use Spotfire S+ to answer such questions.

Setting up the data

The data consist of two sets of observations, so they are appropriately described in Spotfire S+ as a data frame with two variables.

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.

2. Enter the nineteen observations listed in Table 6.1. Change the column names by first double-clicking on `V1` and typing in `gain.high`, and then double-clicking on `V2` and typing in `gain.low`. Press ENTER or click elsewhere in the **Data** window to accept the changes.

3. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `weight.gain` in the **Name** field and click **OK**.

Exploratory data analysis

To begin, we want to evaluate the shape of the distribution to see if both our variables are normally distributed. To do this, create the following plots for each of the variables: a boxplot, a histogram, a density plot, and a QQ normal plot. You can create these plots by selecting a column in the `weight.gain` **Data** window, opening the **Plots 2D** palette, and clicking the appropriate plot buttons.

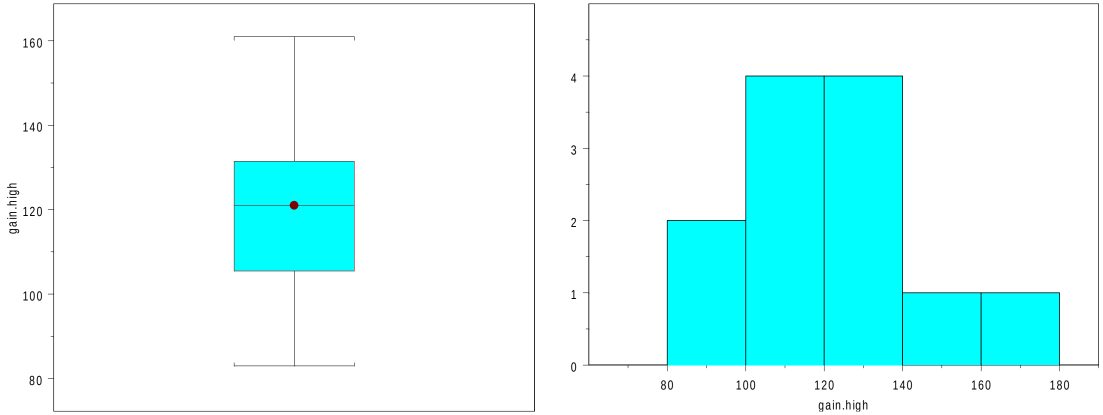


Figure 6.14: *Exploratory data analysis plots for the high-protein data.*

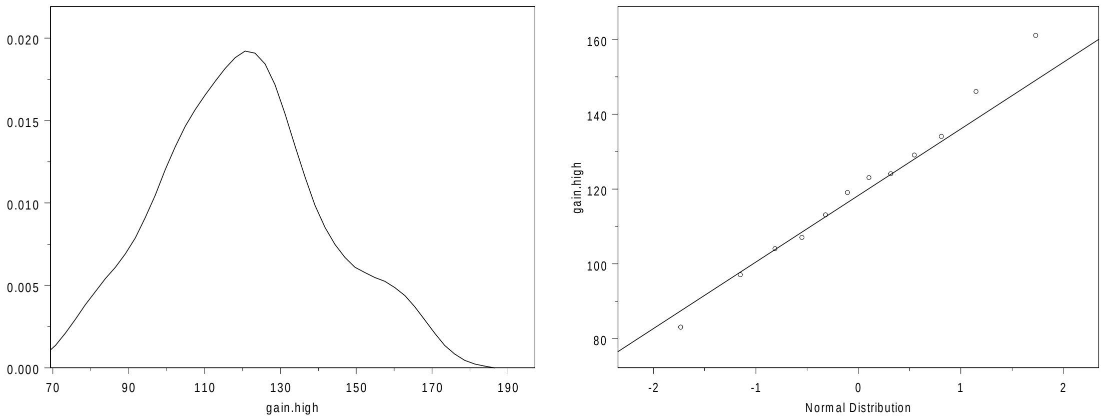


Figure 6.14: *Exploratory data analysis plots for the high-protein data. (Continued)*

The plots for the high-protein group are similar to the ones shown in Figure 6.14. They indicate that the data come from a nearly normal distribution, and there is no indication of outliers. The plots for the low-protein group, which we do not show, support the same conclusions.

Statistical inference

Is the mean weight gain the same for the two groups of rats? Specifically, does the high-protein group show a higher average weight gain? From our exploratory data analysis, we have good reason to believe that Student's t test provides a valid test of our hypotheses. As in the one-sample case, you can obtain confidence intervals and hypothesis test p values for the difference $\mu_1 - \mu_2$ between the two mean-value location parameters μ_1 and μ_2. To do this, we use the **Two-sample t Test** and **Two-sample Wilcoxon Test** dialogs.

Each two-sample test is specified by a hypothesis to be tested, the confidence level, and a hypothesized μ_0 that refers to the *difference* of the two sample means. However, because of the possibility that the two samples may be from different distributions, you may also specify whether the two samples have equal variances. To determine the correct setting for the option **Assume Equal Variances**, you can either use informal inspection of the variances and box plots, or conduct a formal F test to check for equality of variance. If the heights of the boxes in the two box plots are approximately the same, then so are the variances of the two samples. In the `weight.gain` example, the box plots indicate that the equal variance assumption probably holds. To check this assumption, we calculate the variances exactly:

1. Open the **Summary Statistics** dialog.
2. Enter `weight.gain` as the **Data Set**.
3. Click on the **Statistics** tab, and select the **Variance** check box.
4. Click **OK**.

The following output appears in the **Report** window:

```
      ***  Summary Statistics for data in:  weight.gain ***
          gain.high  gain.low
     Min:  83.00000  70.00000
 1st Qu.: 106.25000  89.50000
    Mean: 120.00000 101.00000
  Median: 121.00000 101.00000
 3rd Qu.: 130.25000 112.50000
     Max: 161.00000 132.00000
 Total N:  12.00000  12.00000
   NA's :   0.00000   5.00000
Variance: 457.45455 425.33333
Std Dev.:  21.38819  20.62361
```

The actual variances of our two samples are 457.4 and 425.3, respectively. These values support our assertion of equal variances.

We are interested in two alternative hypotheses: the two-sided alternative that $\mu_H - \mu_L = 0$ and the one-sided alternative that $\mu_H - \mu_L > 0$. To test these, we run the standard two-sample *t* test twice, once with the default two-sided alternative and a second time with the one-sided alternative hypothesis `greater`.

1. Open the **Two-sample t Test** dialog.
2. Type `weight.gain` in the **Data Set** field.
3. Select `gain.high` as **Variable 1** and `gain.low` as **Variable 2**. By default, the **Variable 2 is a Grouping Variable** check box should not be selected, and the **Assume Equal Variances** check box should be selected.

4. Click **Apply**.

The result appears in the **Report** window:

```
       Standard Two-Sample t-Test

data:  x: gain.high in weight.gain , and y: gain.low
   in weight.gain
t = 1.8914, df = 17, p-value = 0.0757
alternative hypothesis: true difference in means is
   not equal to 0
95 percent confidence interval:
  -2.193679  40.193679
sample estimates:
 mean of x mean of y
       120       101
```

The p value is 0.0757, so the null hypothesis is rejected at the 0.10 level but not at the 0.05 level. The confidence interval is $(-2.2, 40.2)$. In other words, we conclude at the 0.05 level that there is no significant difference in the weight gain between the two diets.

To test the one-sided alternative that $\mu_H - \mu_L > 0$, we change the **Alternative Hypothesis** field to `greater` in the **Two-sample t Test** dialog. Click **OK** to perform the test and see the following output:

```
       Standard Two-Sample t-Test

data:  x: gain.high in weight.gain , and y: gain.low
   in weight.gain
t = 1.8914, df = 17, p-value = 0.0379
alternative hypothesis: true difference in means is
   greater than 0
95 percent confidence interval:
 1.525171       NA
sample estimates:
 mean of x mean of y
       120       101
```

In this case, the *p* value is just half of the *p* value for the two-sided alternative. This relationship between the *p* values holds in general. You also see that when you use the `greater` alternative hypothesis, you get a lower confidence bound. This is the natural one-sided confidence interval corresponding to the "greater than" alternative.

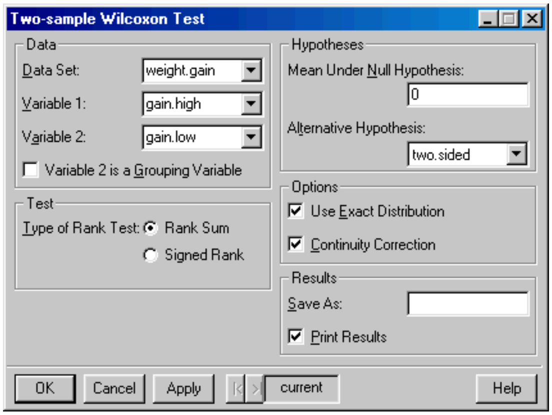
Two-Sample Wilcoxon Test

The *Wilcoxon rank sum test* is used to test whether two sets of observations come from the same distribution. The alternative hypothesis is that the observations come from distributions with identical shape but different locations. Unlike the two-sample *t* test, this test does not assume that the observations come from normal (Gaussian) distributions. The Wilcoxon rank sum test is equivalent to the Mann-Whitney test.

For paired data, specify "signed rank" as the type of Wilcoxon rank test.

Performing a two-sample Wilcoxon rank test

From the main menu, choose **Statistics ► Compare Samples ► Two Samples ► Wilcoxon Rank Test**. The **Two-sample Wilcoxon Test** dialog opens, as shown in Figure 6.15.



Two-sample Wilcoxon Test

Data

Data Set: weight.gain

Variable 1: gain.high

Variable 2: gain.low

☐ Variable 2 is a Grouping Variable

Test

Type of Rank Test: ● Rank Sum ○ Signed Rank

Hypotheses

Mean Under Null Hypothesis: 0

Alternative Hypothesis: two.sided

Options

☑ Use Exact Distribution

☑ Continuity Correction

Results

Save As:

☑ Print Results

Figure 6.15: *The **Two-sample Wilcoxon Test** dialog.*

Example

In Two-Sample t Test on page 224, we conducted a test to see if the mean weight gain from a high-protein diet differs from that of a low-protein diet. The two-sample *t* test was significant at the 0.10 level but not at the 0.05 level. Since normality holds, a two-sample t test is probably most appropriate for these data. However, for illustrative purposes we conduct a two-sample Wilcoxon test to see if the two diets differ in mean weight gain. We conduct a two-sided test, where the null hypothesis is that the difference in diets is 0; that is, we test if the mean weight gain is the same for each diet.

1. If you have not done so already, create the `weight.gain` data set with the instructions given on page 226.
2. Open the **Two-sample Wilcoxon Test** dialog.
3. Specify `weight.gain` as the **Data Set**.
4. Select `gain.high` as **Variable 1** and `gain.low` as **Variable 2**. By default, the **Variable 2 is a Grouping Variable** check box should not be selected, and the **Type of Rank Test** should be set to **Rank Sum**. Click **OK**.

The **Report** window shows the following output:

```
        Wilcoxon rank-sum test
data:  x: gain.high in weight.gain , and y: gain.low in
  weight.gain
rank-sum normal statistic with correction Z = 1.6911,
  p-value = 0.0908
alternative hypothesis: true mu is not equal to 0
```

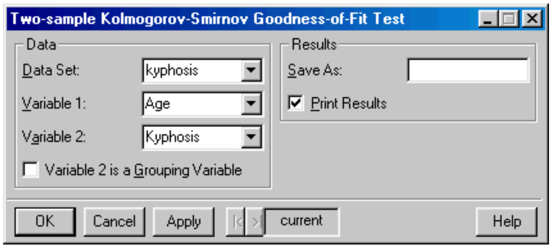
You may also see a warning in the **Message** window because the value 107 appears twice in the data set. The warning can be ignored for now. The p value of 0.0908 is based on the normal approximation, which is used because of ties in the data. It is close to the t statistic p value of 0.0757. It therefore supports our conclusion that the mean weight gain is not significantly different at level 0.05 in the high- and low-protein diets.

Kolmogorov-Smirnov Goodness-of-Fit

The *two-sample Kolmogorov-Smirnov goodness-of-fit test* is used to test whether two sets of observations could reasonably have come from the same distribution. This test assumes that the two samples are random and mutually independent, and that the data are measured on at least an ordinal scale. In addition, the test gives exact results only if the underlying distributions are continuous.

Perform a two-sample Kolmogorov-Smirnov goodness-of-fit test

From the main menu, choose **Statistics ▶ Compare Samples ▶ Two Samples ▶ Kolmogorov-Smirnov GOF**. The **Two-sample Kolmogorov-Smirnov Goodness-of-Fit Test** dialog opens, as shown in Figure 6.16.



Two-sample Kolmogorov-Smirnov Goodness-of-Fit Test

Data

Data Set: kyphosis

Variable 1: Age

Variable 2: Kyphosis

□ Variable 2 is a Grouping Variable

Results

Save As:

☑ Print Results

Figure 6.16: *The* ***Two-sample Kolmogorov-Smirnov Goodness-of-Fit Test*** *dialog.*

Example

The `kyphosis` data set has 81 rows representing data on 81 children who have had corrective spinal surgery. The outcome `Kyphosis` is a binary variable, and the other three columns `Age`, `Number`, and `Start`, are numeric. Kyphosis is a post-operative deformity which is present in some children receiving spinal surgery. We are interested in examining whether the child's age, the number of vertebrae operated on, or the starting vertebra influence the likelihood of the child having a deformity. As an exploratory tool, we test whether the distributions of `Age`, `Number`, and `Start` are the same for the children with and without kyphosis.

1. Open the **Two-sample Kolmogorov-Smirnov Goodness-of-Fit Test** dialog.
2. Type `kyphosis` in the **Data Set** field.
3. We perform separate tests for each of the three covariates, in each case grouping by `Kyphosis`. Select `Kyphosis` as **Variable 2**. Select the **Variable 2 is a Grouping Variable** check box.
4. Select `Age` as **Variable 1**. Click **Apply**.
5. Select `Number` as **Variable 1**. Click **Apply**.
6. Select `Start` as **Variable 1**. Click **OK**.

A **Report** window appears with three goodness-of-fit summaries. The *p* values for `Age`, `Number`, and `Start` are 0.076, 0.028, and 0.0002, respectively. This suggests that the children with and without kyphosis do not differ significantly in the distribution of their ages, but do differ significantly in the distributions of how many vertebrae were involved in the operation, as well as which vertebra was the starting vertebra. This is consistent with the logistic regression model fit to these data later, in Logistic Regression on page 295.

K-Sample Tests

Spotfire S+ supports a variety of techniques to analyze group mean differences in designed experiments.

- **One-way analysis of variance**: a simple one-factor analysis of variance. No interactions are assumed among the main effects. That is, the k samples are considered independent, and the data must be normally distributed.
- **Kruskal-Wallis rank sum test**: a nonparametric alternative to a one-way analysis of variance. No distributional assumptions are made.
- **Friedman rank sum test**: a nonparametric analysis of means of a one-factor designed experiment with an unreplicated blocking variable.

The **ANOVA** dialog provides analysis of variance models involving more than one factor; see Analysis of Variance on page 300.

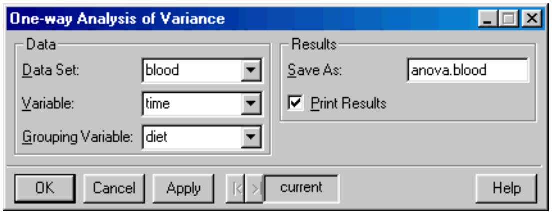
One-Way Analysis of Variance

The **One-Way Analysis of Variance** dialog generates a simple analysis of variance (ANOVA) table when there is a grouping variable available that defines separate samples of the data. No interactions are assumed among the main effects; that is, the samples are considered to be independent. The ANOVA tables include F statistics, which test whether the mean values for all of the groups are equal. These statistics assume that the observations are normally (Gaussian) distributed.

For more complex models or ANOVA with multiple predictors, use the **Analysis of Variance** dialog.

Perform a one-way ANOVA

From the main menu, choose **Statistics ▶ Compare Samples ▶ k Samples ▶ One-way ANOVA**. The **One-way Analysis of Variance** dialog opens, as shown in Figure 6.17.



One-way Analysis of Variance

Data

Data Set: blood

Variable: time

Grouping Variable: diet

Results

Save As: anova.blood

☑ Print Results

Figure 6.17: *The* ***One-way Analysis of Variance*** *dialog.*

Example

The simplest kind of experiments are those in which a single continuous *response* variable is measured a number of times for each of several *levels* of some experimental *factor.* For example, consider the data in Table 6.2 (from Box, Hunter, and Hunter (1978)). The data consist of numerical values of blood coagulation times for each of four diets. Coagulation time is the continuous response variable, and diet is a *qualitative* variable, or *factor*, having four levels: A, B, C, and D. The diets corresponding to the levels A, B, C, and D were determined by the experimenter.

Table 6.2: *Blood coagulation times for four diets.*

Diet			
A	**B**	**C**	**D**
62	63	68	56
60	67	66	62
63	71	71	60
59	64	67	61
	65	68	63

Table 6.2: *Blood coagulation times for four diets. (Continued)*

Diet			
A	**B**	**C**	**D**
	66	68	64
			63
			59

Your main interest is to see whether or not the factor "diet" has any effect on the mean value of blood coagulation time. Experimental factors such as "diet" are often called the *treatments.*

Formal statistical testing for whether the factor levels affect the mean coagulation time is carried out using analysis of variance (ANOVA). This method needs to be complemented by exploratory graphics to provide confirmation that the model assumptions are sufficiently correct to validate the formal ANOVA conclusion. Spotfire S+ provides tools for you to do both the data exploration and the formal ANOVA.

Setting up the data

We have one factor variable `diet` and one response variable `time`. The data are appropriately described in Spotfire S+ as a data set with two columns. The steps below create a data frame named `blood` containing the data from Table 6.2.

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.
2. Enter the four columns of observations listed in Table 6.2. Change the column names by double-clicking on `V1` and typing in `A`, double-clicking on `V2` and typing in `B`, and so on. Press ENTER or click elsewhere in the **Data** window to accept the changes.

3. Select **Data ► Restructure ► Stack** from the main menu. In the **From** group of fields, verify that the name of the data set appears in the **Data Set** field. Select **<ALL>** in the **Stack Columns** list.

4. In the **To** group of fields, type `blood` as the **Data Set**, `time` for the **Stack Column**, and `diet` for the **Group Column**. Click **OK**. This step creates a data set named `blood` containing the data points from Table 6.2 in a two-column format.

5. Select **Data ► Restructure ► Pack** from the main menu. Verify that `blood` appears in the **Data Set** field and select **<ALL>** in the **Columns** list. This step removes all observations with `NA`s.

Exploratory data analysis

Box plots are a quick and easy way to get a first look at the data. Highlight the two columns, `diet` and `time`, in the `blood` **Data** window. Open the **Plots 2D** palette and click the **Box** button to generate the box plots.

The resulting box plots are similar to those in Figure 6.18. This plot indicates that the responses for diets A and D are quite similar, while the median responses for diets B and C are considerably larger relative to the variability reflected by the heights of the boxes. Thus, you suspect that diet has an effect on blood coagulation time.

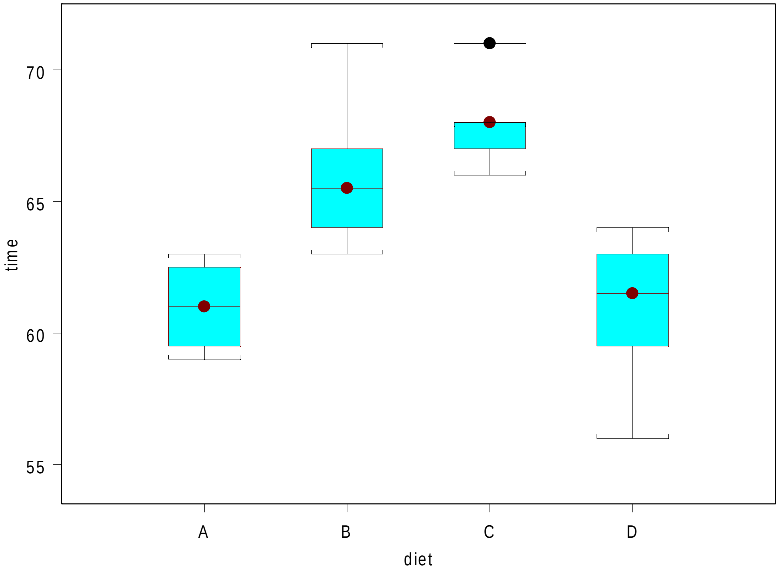


Figure 6.18: *Box plots for each of the four diets in the* `blood` *data set.*

The one-way layout model and analysis of variance

The classical model for experiments with a single factor is

$$y_{ij} = \mu_i + \varepsilon_{ij} \qquad j = 1, \ldots, J_i$$
$$i = 1, \ldots, I$$

where μ_i is the mean value of the response for the ith level of the experimental factor. There are I levels of the experimental factor, and J_i measurements $y_{i1}, y_{i2}, \ldots, y_{iJ_i}$ are taken on the response variable for level i of the experimental factor. Using the treatment terminology, there are I treatments and μ_i is called the ith treatment mean. This is often called the *one-way layout* model. For the blood coagulation experiment, there are $I = 4$ diets, and the means μ_1,

μ_2, μ_3, and μ_4 correspond to diets A, B, C, and D, respectively. The numbers of observations are $J_A = 4$, $J_B = 6$, $J_C = 6$, and $J_D = 8$.

You may carry out the analysis of variance using the **One-way Analysis of Variance** dialog.

1. Open the **One-way Analysis of Variance** dialog.
2. Type `blood` in the **Data Set** field.
3. Select `time` as the **Variable** and `diet` as the **Grouping Variable**.
4. To generate multiple comparisons in a later section, we save the results by typing `anova.blood` in the **Save As** field.
5. Click **OK** to perform the ANOVA.

The results are displayed in the **Report** window:

```
  ***  One-Way ANOVA for data in time by diet ***

Call:
   aov(formula = structure(.Data = time ~ diet, class =
   "formula"), data = blood)

Terms:
                diet Residuals
 Sum of Squares  228       112
Deg. of Freedom    3        20

Residual standard error: 2.366432
Estimated effects may be unbalanced

          Df Sum of Sq Mean Sq  F Value         Pr(F)
     diet  3       228    76.0 13.57143 0.00004658471
Residuals 20       112     5.6
```

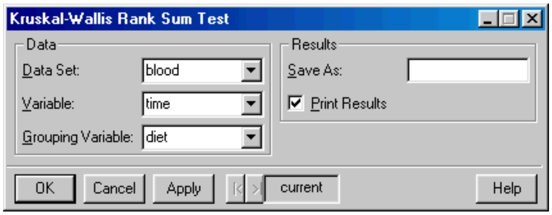
The p value is equal to 0.000047, which is highly significant; we therefore conclude that diet does affect blood coagulation times.

Kruskal-Wallis Rank Sum Test

The *Kruskal-Wallis rank test* is a nonparametric alternative to a one-way analysis of variance. The null hypothesis is that the true location parameter for y is the same in each of the groups. The alternative hypothesis is that y is different in at least one of the groups. Unlike one-way ANOVA, this test does not require normality.

Performing a Kruskal-Wallis rank sum test

From the main menu, choose **Statistics ▶ Compare Samples ▶ k Samples ▶ Kruskal-Wallis Rank Test**. The **Kruskal-Wallis Rank Sum Test** dialog opens, as shown in Figure 6.19.



Kruskal-Wallis Rank Sum Test

Data

Data Set: blood

Variable: time

Grouping Variable: diet

Results

Save As:

☑ Print Results

Figure 6.19: *The* ***Kruskal-Wallis Rank Sum Test*** *dialog.*

Example

In One-Way Analysis of Variance on page 234, we concluded that diet affects blood coagulation times. The one-way ANOVA requires the data to be normally distributed. The nonparametric Kruskal-Wallis rank sum test does not make any distributional assumptions and can be applied to a wider variety of data. We now conduct the Kruskal-Wallis rank sum test on the `blood` data set.

1. If you have not done so already, create the `blood` data set with the instructions given on page 236.
2. Open the **Kruskal-Wallis Rank Sum Test** dialog.
3. Type `blood` in the **Data Set** field.
4. Select `time` as the **Variable** and `diet` as the **Grouping Variable**.
5. Click **OK**.

The **Report** window displays the result:

```
        Kruskal-Wallis rank sum test
```

```
data:  time and diet from data set blood
Kruskal-Wallis chi-square = 17.0154, df = 3,
     p-value = 0.0007
alternative hypothesis: two.sided
```

The *p* value is 0.0007, which is highly significant. The Kruskal-Wallis rank sum test confirms the results of our one-way ANOVA.

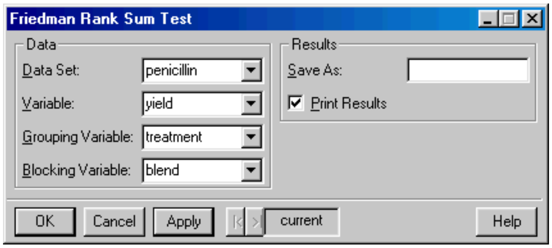
Friedman Rank Test

The *Friedman rank test* is appropriate for data arising from an unreplicated complete block design. In these kinds of designs, exactly one observation is collected from each experimental unit, or *block*, under each treatment. The elements of y are assumed to consist of a groups effect, plus a blocks effect, plus independent and identically distributed residual errors. The interaction between groups and blocks is assumed to be zero.

In the context of a two-way layout with factors groups and blocks, a typical null hypothesis is that the true location parameter for y, net of the blocks effect, is the same in each of the groups. The alternative hypothesis is that it is different in at least one of the groups.

Performing a Friedman rank test

From the main menu, choose **Statistics ▶ Compare Samples ▶ k Samples ▶ Friedman Rank Test**. The **Friedman Rank Sum Test** dialog opens, as shown in Figure 6.20.



Data Set: penicillin
Variable: yield
Grouping Variable: treatment
Blocking Variable: blend
Save As:
☑ Print Results

Figure 6.20: *The* ***Friedman Rank Sum Test*** *dialog.*

Example

The data set shown in Table 6.3 was first used by Box, Hunter, and Hunter in 1978. The data were collected to determine the effect of treatments A, B, C, and D on the yield of penicillin in a penicillin manufacturing process. The response variable is `yield`, and the treatment variable is `treatment`. There is a second factor, `blend`, since a separate blend of the corn-steep liquor had to be made for each application of the treatments.

Our main interest is in determining whether the `treatment` factor affects `yield`. The `blend` factor is of only secondary interest; it is a blocking variable introduced to increase the sensitivity of the inference for treatments. The order of the treatments within blocks was chosen at random. Hence, this is a randomized block experiment.

Table 6.3: *The effect of four treatments on the yield of penicillin.*

blend	**treatment**	**yield**
1	A	89
2	A	84
3	A	81
4	A	87
5	A	79
1	B	88
2	B	77
3	B	87
4	B	92
5	B	81
1	C	97
2	C	92
3	C	87
4	C	89
5	C	80

Table 6.3: *The effect of four treatments on the yield of penicillin. (Continued)*

blend	treatment	yield
1	D	94
2	D	79
3	D	85
4	D	84
5	D	88

Setting up the data

We use the **Factorial Design** dialog to create a `penicillin` data set containing the information in Table 6.3. For more information on this dialog, see Factorial on page 264.

1. Select **Statistics** ▶ **Design** ▶ **Factorial Design** from the main menu.
2. In the **Levels** field, type `5,4`. This step specifies 5 levels for the first column in our data set, and 4 levels for the second column.
3. We now need to name the levels in our two factor columns. In the **Factor Names** field, type the following expression:

   ```
   c("Blend 1", "Blend 2", "Blend 3", "Blend 4", "Blend
   5"), c("A", "B", "C", "D")
   ```
4. Type `penicillin` in the **Save In** field and click **OK**.
5. In the third column of the `penicillin` **Data** window, type the twenty `yield` values from Table 6.3.
6. Rename the columns `blend`, `treatment`, and `yield`, so that they match the names in the table.

Statistical inference

We use the Friedman rank test to test the null hypothesis that there is no treatment effect.

1. Open the **Friedman Rank Sum Test** dialog.
2. Type `penicillin` in the **Data Set** field.

3. Select `yield` as the **Variable**, `treatment` as the **Grouping Variable**, and `blend` as the **Blocking Variable**.
4. Click **OK**.

A summary for the Friedman test appears in the **Report** window. The *p* value is 0.322, which is not significant. This *p* value is computed using an asymptotic chi-squared approximation.

Counts and Proportions

Spotfire S+ supports a variety of techniques to analyze counts and proportions.

- **Binomial Test:** an exact test used with binomial data to assess whether the data come from a distribution with a specified proportion parameter.
- **Proportions Parameters:** a chi-square test to assess whether a binomial sample has a specified proportion parameter, or whether two binomial samples have the same proportion parameter.
- **Fisher's Exact Test:** a test for independence between the rows and columns of a contingency table.
- **McNemar's Test:** a test for independence in a contingency table when matched variables are present.
- **Mantel-Haenszel Test:** a chi-square test of independence for a three-dimensional contingency table.
- **Chi-square Test:** a chi-square test for independence for a two-dimensional contingency table.

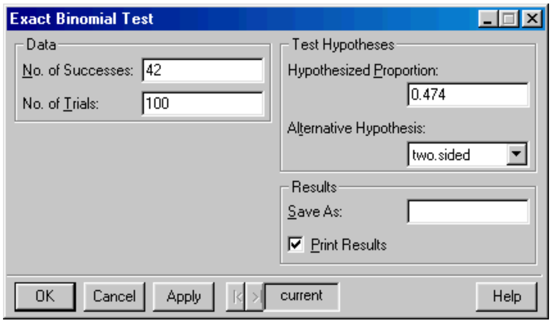
Binomial data are data representing a certain number k of successes out of n trials, where observations occur independently with probability p of a success. Contingency tables contain counts of the number of occurrences of each combination of two or more categorical (factor) variables.

Binomial Test

The *exact binomial test* is used with binomial data to assess whether the data are likely to have come from a distribution with a specified proportion parameter p. Binomial data are data representing a certain number k of successes out of n trials, where observations occur independently with probability p of a success. Examples include coin toss data.

Performing an exact binomial test

From the main menu, choose **Statistics ▶ Compare Samples ▶ Counts and Proportions ▶ Binomial Test**. The **Exact Binomial Test** dialog opens, as shown in Figure 6.21.



Exact Binomial Test

Data

No. of Successes: 42

No. of Trials: 100

Test Hypotheses

Hypothesized Proportion: 0.474

Alternative Hypothesis: two.sided

Results

Save As:

☑ Print Results

Figure 6.21: *The **Exact Binomial Test** dialog.*

Example

When you play roulette and bet on red, you expect your probability of winning to be close to, but slightly less than, 0.5. You expect this because, in the United States, a roulette wheel has 18 red slots, 18 black slots, and two additional slots labeled "0" and "00." This gives a total of 38 slots into which the ball can fall. Thus, for a fair or perfectly balanced wheel, you expect the probability of red to be $p_0 = 18/38 = 0.474$. You hope that the house is not cheating you by altering the roulette wheel so that the probability of red is less than 0.474.

For example, suppose you bet on red 100 times and red comes up 42 times. You wish to ascertain whether these results are reasonable with a fair roulette wheel.

1. Open the **Exact Binomial Test** dialog.
2. Enter 42 as the **No. of Successes**. Enter 100 as the **No. of Trials**.
3. Enter 0.474 as the **Hypothesized Proportion**.

4. Click **OK**.

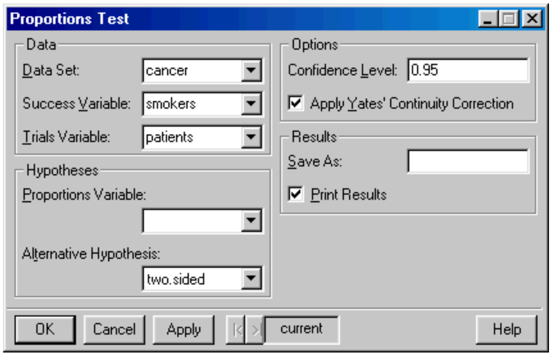
A summary of the test appears in the **Report** window. The *p* value of 0.3168 indicates that our sample is consistent with data drawn from a binomial distribution with a proportions parameter of 0.474. Hence, the roulette wheel seems to be fair.

Proportions Parameters

The *proportions parameters test* uses a Pearson's chi-square statistic to assess whether a binomial sample has a specified proportion parameter p. In addition, it can assess whether two or more samples have the same proportion parameter. As the proportions parameters test uses a normal approximation to the binomial distribution, it is less powerful than the exact binomial test. Hence, the exact binomial test is usually preferred. The advantages of the proportions parameters test are that it provides a confidence interval for the proportions parameter, and that it may be used with multiple samples.

Performing a proportions parameters test

From the main menu, choose **Statistics ▶ Compare Samples ▶ Counts and Proportions ▶ Proportions Parameters**. The **Proportions Test** dialog opens, as shown in Figure 6.22.



Data Set: cancer

Success Variable: smokers

Trials Variable: patients

Proportions Variable:

Alternative Hypothesis: two.sided

Confidence Level: 0.95

☑ Apply Yates' Continuity Correction

Save As:

☑ Print Results

Figure 6.22: *The* ***Proportions Test*** *dialog.*

Example

Sometimes you may have multiple samples of subjects, with each subject characterized by the presence or absence of some characteristic. An alternative, but equivalent, terminology is that you have three or more sets of trials, with each trial resulting in a success or failure. For example, the data set shown in Table 6.4 summarizes the results of four different studies of lung cancer patients, as presented by Fleiss (1981). Each study has a certain number of `patients`, and for each study a certain number of the patients were `smokers`.

Table 6.4: *Four different studies of lung cancer patients.*

Smokers	Patients
83	86
90	93
129	136
70	82

Setting up the data

We create a `cancer` data set containing the information in Table 6.4.

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.
2. Enter the two columns of observations listed in Table 6.4. Change the column names by first double-clicking on `V1` and typing in `smokers`, and then double-clicking on `V2` and typing in `patients`. Press ENTER or click elsewhere in the **Data** window to accept the changes.
3. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `cancer` in the **Name** field and click **OK**.

Statistical inference

For the `cancer` data, we are interested in whether the probability of a patient being a smoker is the same in each of the four studies. That is, we wish to test whether each of the studies involve patients from a homogeneous population.

1. Open the **Proportions Test** dialog.
2. Type `cancer` in the **Data Set** field.

3. Select `smokers` as the **Success Variable** and `patients` as the **Trial Variable**.
4. Click **OK**.

A summary of the test appears in the **Report** window. The *p* value of 0.0056 indicates that we reject the null hypothesis of equal proportions parameters. Hence, we cannot conclude that all groups have the same probability that a patient is a smoker.

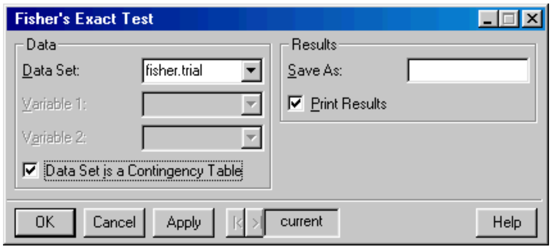
Fisher's Exact Test

Fisher's exact test is a test for independence between the row and column variables of a contingency table. When the data consist of two categorical variables, a contingency table can be constructed reflecting the number of occurrences of each factor combination. Fisher's exact test assesses whether the value of one factor is independent of the value of the other. For example, this might be used to test whether political party affiliation is independent of gender. Certain types of homogeneity, for example, homogeneity of proportions in a $k \times 2$ table, are equivalent to the independence hypothesis. Hence, this test may also be of interest in such cases.

As this is an exact test, the total number of counts in the cross-classification table cannot be greater than 200. In such cases, the chi-square test of independence is preferable.

Performing Fisher's exact test

From the main menu, choose **Statistics ► Compare Samples ► Counts and Proportions ► Fisher's Exact Test**. The **Fisher's Exact Test** dialog opens, as shown in Figure 6.23.



Data Set: fisher.trial

☑ Data Set is a Contingency Table

☑ Print Results

Figure 6.23: *The **Fisher's Exact Test** dialog.*

Example

The data set shown in Table 6.5 contains a contingency table summarizing the results of a clinical trial. Patients were divided into a treatment group that received an experimental drug and a control group that did not. These patients were then monitored for 28 days, with their survival status noted at the end of the study.

Table 6.5: *A contingency table summarizing the results of a clinical trial.*

	Control	Treated
Died	17	7
Survived	29	38

Setting up the data

We create a `fisher.trial` data set containing the information in Table 6.5.

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.
2. Enter the two columns of observations listed in Table 6.5.
3. Change the column names by first double-clicking on `V1` and typing in `Control`, and then double-clicking on `V2` and typing in `Treated`.
4. Change the row names by double-clicking in the gray box next to the first entry in each row. Type `Died` for the first row name and `Survived` for the second row name. You can resize the gray column to better view the row names; to do this, drag and drop the right border of the column to its desired width.
5. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `fisher.trial` in the **Name** field and click **OK**.

Statistical inference

We are interested in examining whether the treatment affected the probability of survival.

1. Open the **Fisher's Exact Test** dialog.

2. Type `fisher.trial` in the **Data Set** field.
3. Select the **Data Set is a Contingency Table** check box.
4. Click **OK**.

A summary of the test appears in the **Report** window. The *p* value of 0.0314 indicates that we reject the null hypothesis of independence. Hence, we conclude that the treatment affects the probability of survival.

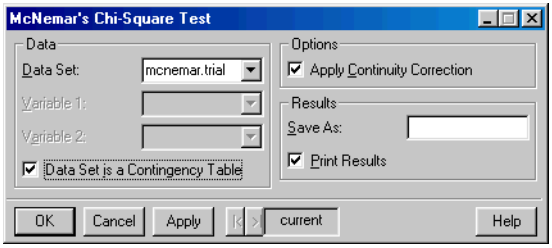
McNemar's Test

In some experiments with two categorical variables, one of the variables specifies two or more groups of individuals that receive different treatments. In such situations, matching of individuals is often carried out in order to increase the precision of statistical inference. However, when matching is carried out, the observations usually are not independent. In such cases, the inference obtained from the chi-square test, Fisher's exact test, and Mantel-Haenszel test is not valid because these tests all assume independent observations.

McNemar's test allows you to obtain a valid inference for experiments where matching is carried out. McNemar's statistic is used to test the null hypothesis of symmetry: namely, that the probability of an observation being classified into cell $[i,j]$ is the same as the probability of being classified into cell $[j,i]$. The returned *p* value should be interpreted carefully. Its validity depends on the assumption that the cell counts are at least moderately large. Even when cell counts are adequate, the chi-square is only a large-sample approximation to the true distribution of McNemar's statistic under the null hypothesis.

Performing McNemar's test

From the main menu, choose **Statistics ▶ Compare Samples ▶ Counts and Proportions ▶ McNemar's Test**. The **McNemar's Chi-Square Test** dialog opens, as shown in Figure 6.24.



McNemar's Chi-Square Test

Data

Data Set: mcnemar.trial

Variable 1:

Variable 2:

☑ Data Set is a Contingency Table

Options

☑ Apply Continuity Correction

Results

Save As:

☑ Print Results

Figure 6.24: *The **McNemar's Chi-Square Test** dialog.*

Example

The data set shown in Table 6.6 contains a contingency table of matched pair data, in which each count is associated with a matched pair of individuals.

Table 6.6: *Contingency table of matched pair data.*

	B,Survive	**B,Die**
A,Survive	90	16
A,Die	5	510

In this table, each entry represents a pair of patients, one of whom was given treatment A while the other was given treatment B. For instance, the 5 in the lower left cell means that in five pairs, the person with treatment A died, while the individual the person was paired with survived. We are interested in the relative effectiveness of treatments A and B in treating a rare form of cancer.

A pair in the table for which one member of a matched pair survives while the other member dies is called a *discordant pair.* There are 16 discordant pairs in which the individual who received treatment A survived and the individual who received treatment B died. There are five discordant pairs with the reverse situation, in which the individual who received treatment A died and the individual who received treatment B survived. If both treatments are equally effective, then we expect these two types of discordant pairs to occur with nearly equal frequency. Put in terms of probabilities, the null hypothesis is that $p_1 = p_2$, where p_1 is the probability that the first type of discordancy occurs and p_2 is the probability that the second type of discordancy occurs.

Setting up the data

We create a `mcnemar.trial` data set containing the information in Table 6.6.

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.
2. Enter the two columns of observations listed in Table 6.5.
3. Change the column names by first double-clicking on `V1` and typing in `B.Survive`, and then double-clicking on `V2` and typing in `B.Die`.
4. Change the row names by double-clicking in the gray box next to the first entry in each row. Type `A.Survive` for the first row name and `A.Die` for the second row name. You can resize the gray column to better view the row names; to do this, drag and drop the right border of the column to its desired width.
5. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `mcnemar.trial` in the **Name** field and click **OK**.

Statistical inference

We use McNemar's test to examine whether the treatments are equally effective.

1. Open the **McNemar's Square Test** dialog.
2. Type `mcnemar.trial` in the **Data Set** field.
3. Select the **Data Set is a Contingency Table** check box.
4. Click **OK**.

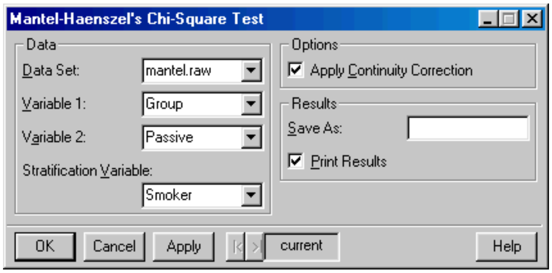
A summary of the test appears in the **Report** window. The *p* value of 0.0291 indicates that we reject the null hypothesis of symmetry in the table. This suggests that the two treatments differ in their efficacy.

Mantel-Haenszel Test

The *Mantel-Haenszel test* performs a chi-square test of independence on a three-dimensional contingency table. It is used for a contingency table constructed from three factors. As with McNemar's test, the returned *p* value should be interpreted carefully. Its validity depends on the assumption that certain sums of expected cell counts are at least moderately large. Even when cell counts are adequate, the chi-square is only a large-sample approximation to the true distribution of the Mantel-Haenszel statistic under the null hypothesis.

Performing a Mantel-Haenszel test

From the main menu, choose **Statistics ► Compare Samples ► Counts and Proportions ► Mantel-Haenszel Test**. The **Mantel-Haenszel's Chi-Square Test** dialog opens, as shown in Figure 6.25.



Mantel-Haenszel's Chi-Square Test

Data

Data Set: mantel.raw

Variable 1: Group

Variable 2: Passive

Stratification Variable: Smoker

Options

☑ Apply Continuity Correction

Results

Save As:

☑ Print Results

Figure 6.25: *The* ***Mantel-Haenszel's Chi-Square Test*** *dialog.*

Example

The data set shown in Table 6.7 contains a three-way contingency table summarizing the results from a cancer study. The first column indicates whether an individual is a smoker. In the second column, "Case" refers to an individual who had cancer and "Control" refers to an individual who did not have cancer. The third column indicates whether an individual is a *passive smoker.* A passive smoker is a person who lives with a smoker, so it is therefore possible for a person to be considered both a smoker and a passive smoker. The fourth column indicates the number of individuals with each combination of `Smoker`, `Group`, and `Passive` values.

Table 6.7: *A three-way contingency table summarizing the results of a cancer study.*

Smoker	Group	Passive	Number
Yes	Case	Yes	120
Yes	Case	No	111
Yes	Control	Yes	80
Yes	Control	No	155
No	Case	Yes	161
No	Case	No	117
No	Control	Yes	130
No	Control	No	124

Setting up the data

We use the **Orthogonal Array Design** dialog to create a `mantel.trial` data set containing the information in Table 6.7. For more information on this dialog, see Orthogonal Array on page 265.

1. Select **Statistics ► Design ► Orthogonal Array Design** from the main menu.
2. In the **Levels** field, type `2,2,2`. This step specifies 2 levels each for the first three columns in our data set.
3. We now need to name the levels in our three factor columns. In the **Factor Names** field, type the following expression:

   ```
   c("Yes", "No"), c("Case", "Control"), c("Yes", "No")
   ```
4. Type `mantel.trial` in the **Save In** field and click **OK**.
5. In the fourth column of the `mantel.trial` **Data** window, enter the eight `Number` values from Table 6.7.
6. Rename the columns `Smoker`, `Group`, `Passive`, and `Number`, so that they match the names in the table.

The mantel.trial data set has eight rows representing the eight possible combinations of three factors with two levels each. However, the **Mantel-Haenszel Chi-Square Test** dialog requires data to be in its raw form and does not accept data in a contingency table. We can use the **Subset** dialog to recreate the raw data as follows:

1. From the main menu, choose **Data ▶ Subset**.
2. Type mantel.trial in the **Data Set** field.
3. Type rep(1:8, Number) in the **Subset Rows with** field. This replicates each of the integers 1 to 8 as many times as indicated by the corresponding count in the Number column.
4. Type mantel.raw in the **Save In** field and click **OK**.

The first three columns of the mantel.raw data set represent the unbinned equivalent to our contingency table. This is the format expected by the **Mantel-Haenszel Chi-Square Test** dialog. We use the mantel.raw data in the example analysis below.

Statistical inference

We use the **Mantel-Haenszel Chi-Square Test** dialog to test the independence between cancer status and passive smoking status.

1. Open the **Mantel-Haenszel's Chi-Square Test** dialog.
2. Type mantel.raw in the **Data Set** field.
3. Select Group as **Variable 1**, Passive as **Variable 2**, and Smoker as the **Stratification Variable**.
4. Click **OK**.

A summary of the test appears in the **Report** window. The *p* value of 0.0002 indicates that we reject the null hypothesis of independence between cancer status and passive smoking.

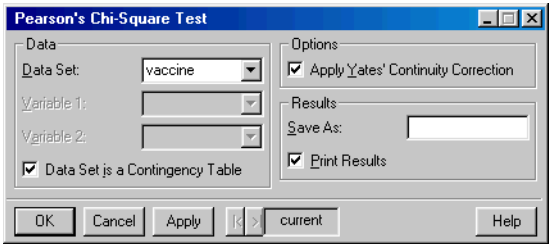
Chi-Square Test

The chi-square test performs a Pearson's chi-square test on a two-dimensional contingency table. This test is relevant to several types of null hypotheses: statistical independence of the rows and columns, homogeneity of groups, etc. The appropriateness of the test to a particular null hypothesis and the interpretation of the results depend on the nature of the data at hand. In particular, the sampling scheme is important in determining the appropriate of a chi-square test.

The *p* value returned by a chi-square test should be interpreted carefully. Its validity depends heavily on the assumption that the expected cell counts are at least moderately large; a minimum size of five is often quoted as a rule of thumb. Even when cell counts are adequate, the chi-square is only a large-sample approximation to the true distribution of chi-square under the null hypothesis. If the data set is smaller than is appropriate for a chi-square test, then Fisher's exact test may be preferable.

Performing Pearson's chi-square test

From the main menu, choose **Statistics ▶ Compare Samples ▶ Counts and Proportions ▶ Chi-square Test**. The **Pearson's Chi-Square Test** dialog opens, as shown in Figure 6.26.



Pearson's Chi-Square Test

Data

Data Set: vaccine

Variable 1:

Variable 2:

☑ Data Set is a Contingency Table

Options

☑ Apply Yates' Continuity Correction

Results

Save As:

☑ Print Results

Figure 6.26: *The **Pearson's Chi-Square Test** dialog.*

Example

The data set shown in Table 6.8 contains a contingency table with results from Salk vaccine trials in the early 1950s. There are two categorical variables for the Salk trials: vaccination status, which has the two levels "vaccinated" and "placebo," and polio status, which has the three levels "no polio," "non-paralytic polio," and "paralytic polio." Of 200,745 individuals who were vaccinated, 24 contracted non-paralytic polio, 33 contracted paralytic polio, and the remaining 200,688 did not contract any kind of polio. Of 201,229 individuals who received the placebo, 27 contracted non-paralytic polio, 115 contracted paralytic polio, and the remaining 201,087 did not contract any kind of polio.

Table 6.8: *A contingency table summarizing the results of the Salk vaccine trials.*

	None	**Nonparalytic**	**Paralytic**
Vaccinated	200,688	24	33
Placebo	201,087	27	115

When working with contingency table data, the primary interest is most often determining whether there is any association in the form of statistical dependence between the two categorical variables whose counts are displayed in the table. The null hypothesis is that the two variables are statistically independent.

Setting up the data

We create a `vaccine` data set containing the information in Table 6.8.

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.
2. Enter the three columns of observations listed in Table 6.8.
3. Change the column names by double-clicking on `V1` and typing in `None`, double-clicking on `V2` and typing in `Nonparalytic`, and then double-clicking on `V3` and typing in `Paralytic`.
4. Change the row names by double-clicking in the gray box next to the first entry in each row. Type `Vaccinated` for the first row name and `Placebo` for the second row name.
5. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `vaccine` in the **Name** field and click **OK**.

Statistical inference

We perform a chi-square test of independency for the `vaccine` data.

1. Open the **Pearson's Chi-Square Test** dialog.

2. Type `vaccine` in the **Data Set** field.
3. Select the **Data Set is a Contingency Table** check box.
4. Click **OK**.

A summary of the test appears in the **Report** window. The *p* value of 0 indicates that we reject the null hypothesis of independence. Vaccination and polio status are related.

POWER AND SAMPLE SIZE

When designing a study, one of the first questions to arise is how large a sample size is necessary. The sample size depends upon the minimum detectable difference of interest, the acceptable probability of rejecting a true null hypothesis (alpha), the desired probability of correctly rejecting a false null hypothesis (power), and the variability within the population(s) under study.

Spotfire S+ provides power and sample size calculations for one and two sample tests of normal means or binomial proportions.

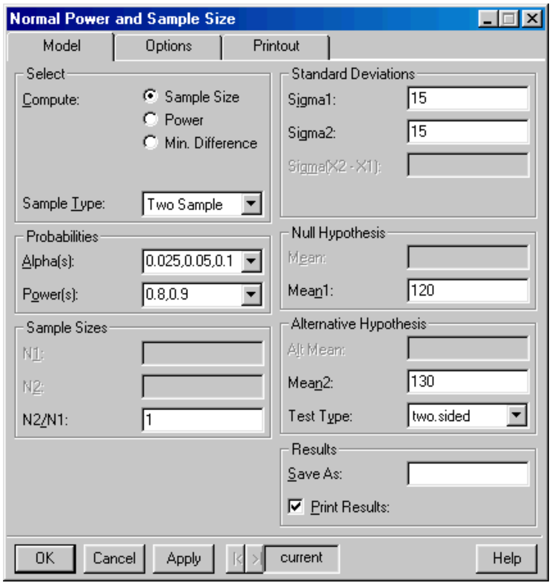
- **Normal power and sample size:** computes sample sizes for statistics that are asymptotically normally distributed, such as a sample mean. Alternatively, it may be used to calculate power or minimum detectable difference for a sample of a specified size.
- **Binomial power and sample size:** computes sample sizes for statistics that are asymptotically binomially distributed, such as a proportion. Alternatively, it may be used to calculate power or minimum detectable difference for a sample of a specified size.

Normal Mean

The **Normal Power and Sample Size** dialog assists in computing sample sizes for statistics that are asymptotically normally distributed. Alternatively, it may be used to calculate power or minimum detectable difference for a sample of a specified size.

Computing power and sample size for a mean

From the main menu, choose **Statistics ▶ Power and Sample Size ▶ Normal Mean**. The **Normal Power and Sample Size** dialog opens, as shown in Figure 6.27.



Select
Compute: ● Sample Size ○ Power ○ Min. Difference
Sample Type: Two Sample

Probabilities
Alpha(s): 0.025,0.05,0.1
Power(s): 0.8,0.9

Sample Sizes
N1:
N2:
N2/N1: 1

Standard Deviations
Sigma1: 15
Sigma2: 15
Sigma(X2 - X1):

Null Hypothesis
Mean:
Mean1: 120

Alternative Hypothesis
Alt Mean:
Mean2: 130
Test Type: two.sided

Results
Save As:
☑ Print Results:

Figure 6.27: *The **Normal Power and Sample Size** dialog.*

Example

A scientist is exploring the efficacy of a new treatment. The plan is to apply the treatment to half of a study group, and then compare the levels of a diagnostic enzyme in the treatment subjects with the untreated control subjects. The scientist needs to determine how many subjects are needed in order to determine whether the treatment significantly changes the concentration of the diagnostic enzyme.

Historical information indicates that the average enzyme level is 120, with a standard deviation of 15. A difference in average level of 10 or more between the treatment and control groups is considered to be of clinical importance. The scientist wants to determine what sample sizes are necessary for various combinations of alpha (the probability of falsely claiming the groups differ when they do not) and power (the probability of correctly claiming the groups differ when they do).

The **Normal Power and Sample Size** dialog produces a table of sample sizes for various combinations of alpha and power.

1. Open the **Normal Power and Sample Size** dialog.

2. Select `Two Sample` as the **Sample Type**.
3. Enter `120` as **Mean1**, `130` as **Mean2**, and `15` for both **Sigma1** and **Sigma2**.
4. Enter `0.025, 0.05, 0.1` for **Alpha(s)**, and enter `0.8, 0.9` for **Power(s)**. We calculate equal sample sizes for all combinations of these alpha and power values.
5. Click **OK**.

A power table is displayed in the **Report** window. The table indicates what sample sizes `n1` and `n2` are needed for each group at various levels of alpha and power. For example, the scientist needs 36 subjects per group to determine a difference of 10 at an alpha of 0.05 and power of 0.8.

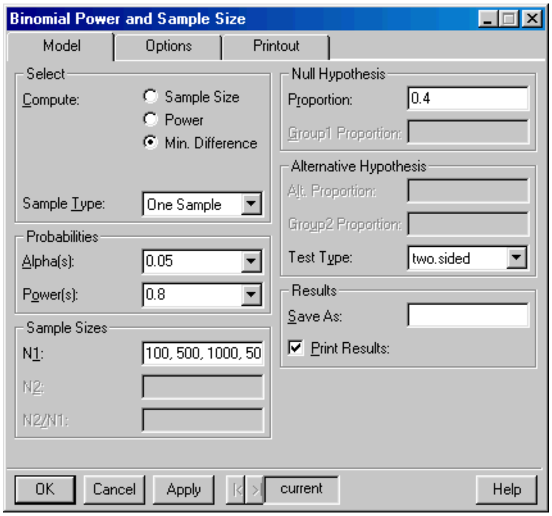
```
       *** Power Table ***
  mean1 sd1 mean2 sd2 delta alpha power n1 n2
1   120  15   130  15    10 0.025   0.8 43 43
2   120  15   130  15    10 0.050   0.8 36 36
3   120  15   130  15    10 0.100   0.8 28 28
4   120  15   130  15    10 0.025   0.9 56 56
5   120  15   130  15    10 0.050   0.9 48 48
6   120  15   130  15    10 0.100   0.9 39 39
```

Binomial Proportion

The **Binomial Power and Sample Size** dialog assists in computing sample sizes for statistics that are asymptotically binomially distributed. Alternatively, it may be used to calculate power or minimum detectable difference for a sample of a specified size.

Computing power and sample size for a proportion

From the main menu, choose **Statistics ▶ Power and Sample Size ▶ Binomial Proportion**. The **Binomial Power and Sample Size** dialog opens, as shown in Figure 6.28.



Select

Compute: ○ Sample Size ○ Power ● Min. Difference

Sample Type: One Sample

Probabilities

Alpha(s): 0.05

Power(s): 0.8

Sample Sizes

N1: 100, 500, 1000, 50

N2:

N2/N1:

Null Hypothesis

Proportion: 0.4

Group1 Proportion:

Alternative Hypothesis

Alt. Proportion:

Group2 Proportion:

Test Type: two.sided

Results

Save As:

☑ Print Results:

Figure 6.28: *The **Binomial Power and Sample Size** dialog.*

Example

Historically, 40% of the voters in a certain congressional district vote for the Democratic congressional candidate. A pollster is interested in determining the proportion of Democratic voters in an upcoming election. The pollster wants to know how sizable a difference could be detected for various sample sizes. That is, how much would the proportion of Democratic voters in the sample have to differ from the historical proportion of 40% to claim that the proportion is significantly different from the historical norm?

1. Open the **Binomial Power and Sample Size** dialog.
2. Select **Min. Difference** as the value to **Compute**. Enter `0.4` as the **Proportion** and `100, 500, 1000, 5000` as the sample sizes **N1** to consider.
3. Click **OK**.

A power table is displayed in the **Report** window. The table indicates the detectable differences `delta` for each sample size. For example, with 1000 observations the pollster could determine whether the proportion varies from 40% by at least 4.34%.

```
          *** Power Table ***
     p.null     p.alt     delta alpha power   n1
```

```
1    0.4 0.5372491 0.1372491  0.05   0.8  100
2    0.4 0.4613797 0.0613797  0.05   0.8  500
3    0.4 0.4434020 0.0434020  0.05   0.8 1000
4    0.4 0.4194100 0.0194100  0.05   0.8 5000
```

EXPERIMENTAL DESIGN

Typically, a researcher begins an experiment by generating a design, which is a data set indicating the combinations of experimental variables at which to take observations. The researcher then measures some outcome for the indicated combinations, and records this by adding a new column to the design data set. Once the outcome is recorded, exploratory plots may be used to examine the relationship between the outcome and the experimental variables. The data may then be analyzed using ANOVA or other techniques.

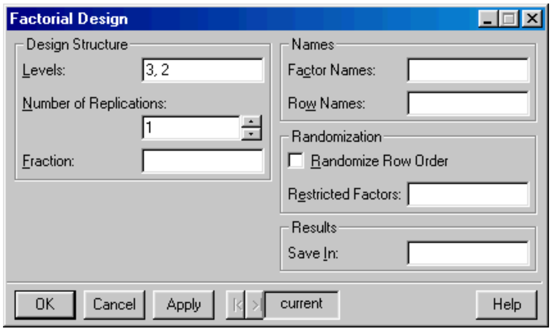
The **Factorial Design** and **Orthogonal Array Design** dialogs create experimental designs. The **Design Plot**, **Factor Plot**, and **Interaction Plot** dialogs produce exploratory plots for designs.

Factorial

The **Factorial Design** dialog creates a *factorial* or *fractional factorial* design. The basic factorial design contains all possible combinations of the variable levels, possibly replicated and randomized. A fractional factorial design excludes some combinations based upon which model effects are of interest.

Creating a factorial design

From the main menu, choose **Statistics ▶ Design ▶ Factorial**. The **Factorial Design** dialog opens, as shown in Figure 6.29.



Levels: 3, 2

Number of Replications: 1

□ Randomize Row Order

Figure 6.29: *The **Factorial Design** dialog.*

Example

We create a design with 3 levels of the first variable and two levels of the second.

1. Open the **Factorial Design** dialog.
2. Specify `3, 2` as the **Levels**.
3. Click **OK**.

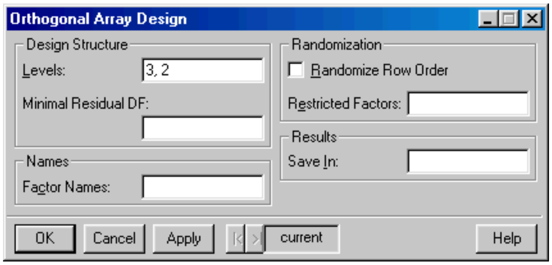
A data set containing the design is created and displayed in a **Data** window.

Orthogonal Array

The **Orthogonal Array Design** dialog creates an orthogonal array design. *Orthogonal array designs* are essentially very sparse fractional factorial designs, constructed such that inferences may be made regarding main (first-order) effects. Level combinations necessary for estimating second- and higher-order effects are excluded in the interest of requiring as few measurements as possible.

Generating an orthogonal array design

From the main menu, choose **Statistics** ► **Design** ► **Orthogonal Array**. The **Orthogonal Array Design** dialog opens, as shown in Figure 6.30.



Levels: 3, 2

□ Randomize Row Order

Figure 6.30: *The* ***Orthogonal Array Design*** *dialog.*

Example

We create a design with 3 levels of the first variable and two levels of the second.

1. Open the **Orthogonal Array Design** dialog.
2. Specify `3, 2` as the **Levels**.

3. Click **OK**.

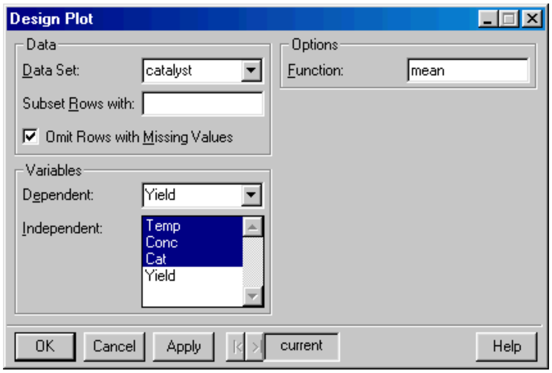
A data set containing the design is created and displayed in a **Data** window. In this simple example, the orthogonal array design is equivalent to the factorial design created in the previous section.

Design Plot

A *design plot* displays a function of a variable for each level of one or more corresponding factors. The default function is the mean.

Creating a design plot

From the main menu, choose **Statistics** ► **Design** ► **Design Plot**. The **Design Plot** dialog opens, as shown in Figure 6.31.



Data

Data Set: catalyst

Subset Rows with:

☑ Omit Rows with Missing Values

Variables

Dependent: Yield

Independent: Temp, Conc, Cat, Yield

Options

Function: mean

Figure 6.31: *The* ***Design Plot*** *dialog.*

Example

The `catalyst` data set comes from a designed experiment. Its eight rows represent all possible combinations of two temperatures (`Temp`), two concentrations (`Conc`), and two catalysts (`Cat`). The fourth column represents the response variable `Yield`. We are interested in determining how temperature, concentration, and catalyst affect the `Yield`. Prior to fitting an ANOVA model, we can use various plots to examine the relationship between these variables. We start with a design plot.

1. Open the **Design Plot** dialog.
2. Type `catalyst` in the **Data Set** field.
3. Select `Yield` as the **Dependent** variable.

4. CTRL-click to select `Temp`, `Conc`, and `Cat` as the **Independent** variables.

5. Click **OK**.

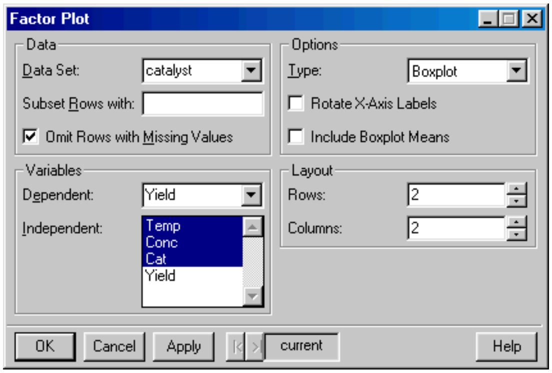
A design plot appears in a **Graph Sheet**. This plot has a vertical bar for each factor, and a horizontal bar indicating the mean of `Yield` for each factor level.

Factor Plot

A *factor plot* consists of side by side plots comparing the values of a variable for different levels of a factor. By default, box plots are used. See the `plot.factor` help file for details.

Creating a factor plot

From the main menu, choose **Statistics ▶ Design ▶ Factor Plot**. The **Factor Plot** dialog opens, as shown in Figure 6.32.



Factor Plot

Data

Data Set: catalyst

Subset Rows with:

☑ Omit Rows with Missing Values

Options

Type: Boxplot

☐ Rotate X-Axis Labels

☐ Include Boxplot Means

Variables

Dependent: Yield

Independent: Temp, Conc, Cat, Yield

Layout

Rows: 2

Columns: 2

Figure 6.32: *The **Factor Plot** dialog.*

Example

We create factor plots for the `catalyst` data set as follows:

1. Open the **Factor Plot** dialog.

2. Type `catalyst` in the **Data Set** field.

3. Select `Yield` as the **Dependent** variable.

4. CTRL-click to select `Temp`, `Conc`, and `Cat` as the **Independent** variables.

5. Change the number of **Rows** and number of **Columns** to **2**. This specifies a 2×2 grid of plots.
6. Click **OK**.

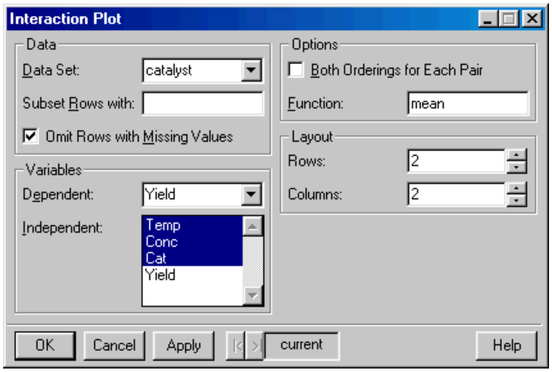
A factor plot appears in a **Graph Sheet**. For each factor there is a set of box plots for `Yield`, with a separate box plot for each factor level.

Interaction Plot

An *interaction plot* displays the levels of one factor along the x-axis, the response on the y-axis, and the points corresponding to a particular level of a second factor connected by lines. This type of plot is useful for exploring or discovering interactions.

Creating an interaction plot

From the main menu, choose **Statistics** ► **Design** ► **Interaction Plot**. The **Interaction Plot** dialog opens, as shown in Figure 6.33.



Data Set: catalyst

Subset Rows with:

☑ Omit Rows with Missing Values

Dependent: Yield

Independent: Temp, Conc, Cat, Yield

☐ Both Orderings for Each Pair

Function: mean

Rows: 2

Columns: 2

Figure 6.33: *The **Interaction Plot** dialog.*

Example

We create interaction plots for the `catalyst` data set as follows:

1. Open the **Interaction Plot** dialog.
2. Type `catalyst` in the **Data Set** field.
3. Select `Yield` as the **Dependent** variable
4. CTRL-click to select `Temp`, `Conc`, and `Cat` as the **Independent** variables.

5. Change the number of **Rows** and number of **Columns** to **2**. This specifies a 2×2 grid of plots.

6. Click **OK**.

An interaction plot appears in a **Graph Sheet**. For each pair of factors, a set of lines is created showing the mean of `Yield` for each level of the second factor at each level of the first factor. If the lines in a plot cross, it suggests that an interaction is present between the two factors.

REGRESSION

Regression is the standard technique for assessing how various predictors relate to a response. This section discusses the regression techniques available from the **Statistics ► Regression** menu.

- **Linear regression**: Predicting a continuous response as a linear function of predictors using a least-squares fitting criterion.

- **Robust MM regression**: Predicting a continuous response using an MM based robust fitting criterion.

- **Robust LTS regression**: Predicting a continuous response using a least-trimmed-squares fitting criterion.

- **Stepwise linear regression**: Selecting which variables to employ in a linear regression model using a stepwise procedure.

- **Generalized additive models:** Predicting a general response as a sum of nonparametric smooth univariate functions of the predictors.

- **Local (loess) regression**: Predicting a continuous response as a nonparametric smooth function of the predictors using least squares.

- **Nonlinear regression**: Predicting a continuous response as a nonlinear function of the predictors using least squares.

- **Generalized linear models:** Predicting a general response as a linear combination of the predictors using maximum likelihood.

- **Log-linear (Poisson) regression**: Predicting counts using Poisson maximum likelihood.

- **Logistic regression**: Predicting a binary response using binomial maximum likelihood with a logistic link.
- **Probit regression:** Predicting a binary response using binomial maximum likelihood with a probit link.

Linear Regression

Linear regression is used to describe the effect of continuous or categorical variables upon a continuous response. It is by far the most common regression procedure. The linear regression model assumes that the response is obtained by taking a specific linear combination of the predictors and adding random variation (error). The error is assumed to have a Gaussian (normal) distribution with constant variance, and to be independent of the predictor values.

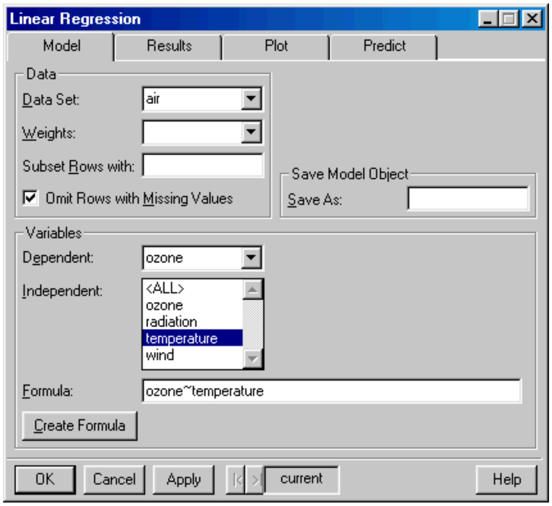
Linear regression uses the method of *least squares*, in which a line is fit that minimizes the sum of the squared residuals. Suppose a set of n observations of the response variable y_i correspond to a set of values of the predictor x_i according to the model $\hat{y} = f(\hat{x})$, where $\hat{y} = (y_1, y_2, \ldots, y_n)$ and $\hat{x} = (x_1, x_2, \ldots, x_n)$. The *i*th *residual* r_i is defined as the difference between the *i*th observation y_i and the *i*th fitted value $\hat{y}_i = \hat{f}(x_i)$: that is, $r_i = y_i - \hat{y}_i$. The method of least squares finds a set of fitted values that minimizes the sum $\sum_{i=1}^{n} r_i^2$.

If the response of interest is not continuous, then logistic regression, probit regression, log-linear regression, or generalized linear regression may be appropriate. If the predictors affect the response in a nonlinear way, then nonlinear regression, local regression, or generalized additive regression may be appropriate. If the data contain outliers or the errors are not Gaussian, then robust regression may be appropriate. If the focus is on the effect of categorical variables, then ANOVA may be appropriate. If the observations are correlated or random effects are present, then a mixed effects or generalized least squares model may be appropriate.

Other dialogs related to linear regression are **Stepwise Linear Regression**, **Compare Models**, and **Multiple Comparisons**. The **Stepwise Linear Regression** dialog uses a stepwise procedure to suggest which variables to include in a model. The **Compare Models** dialog provides tests for determining which of several models is most appropriate. The **Multiple Comparisons** calculates effects for categorical predictors in linear regression or ANOVA.

Fitting a linear regression model

From the main menu, choose **Statistics ▶ Regression ▶ Linear**. The **Linear Regression** dialog opens, as shown in Figure 6.34.



Data Set: air

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Dependent: ozone

Independent: <ALL> ozone radiation temperature wind

Formula: ozone~temperature

Figure 6.34: *The **Linear Regression** dialog.*

Example

We examine the air pollution data in the example data set `air`. This is a data set with 111 observations (rows) and 4 variables (columns). It is taken from an environmental study that measured the four variables ozone, solar radiation, temperature, and wind speed for 111 consecutive days. We first create a scatter plot of the `temperature` and `ozone` variables in `air`, as shown in Figure 6.35.

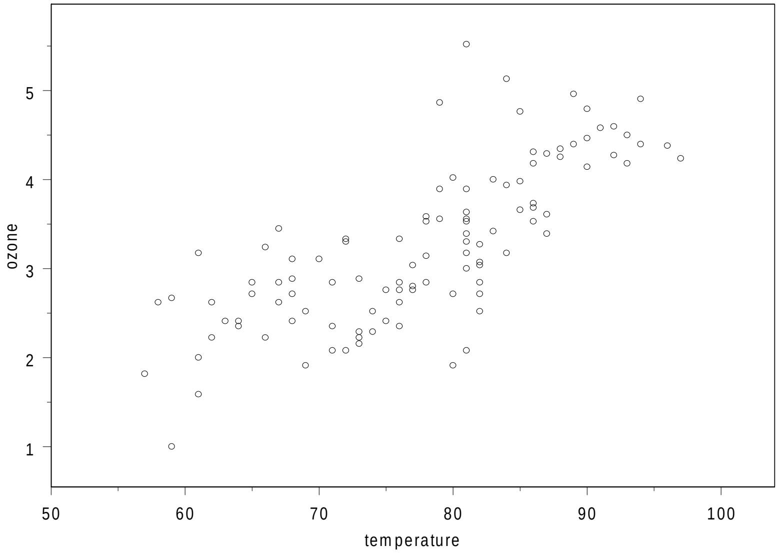


Figure 6.35: *A scatter plot of* `ozone` *versus* `temperature`.

From the scatter plot, we hypothesize a linear relationship between temperature and ozone concentration. We choose `ozone` as the response and `temperature` as the single predictor. The choice of response and predictor variables is driven by the subject matter in which the data arise, rather than by statistical considerations.

1. Open the **Linear Regression** dialog.
2. Type `air` in the **Data Set** field.
3. Type `ozone ~ temperature` in the **Formula** field. Alternatively, select `ozone` as the **Dependent** variable and `temperature` as the **Independent** variable. As a third way of generating a formula, click the **Create Formula** button and select `ozone` as the **Response** variable and `temperature` as a **Main Effect**. You can use the **Create Formula** button to create complicated linear models and learn the notation for model specifications. The online help discusses formula creation in detail.
4. Go to the **Plot** page on the **Linear Regression** dialog and check the seven main diagnostic plots.
5. Click **OK** to do the linear regression.

Spotfire S+ generates a **Graph Sheet** with seven diagnostic plots. You can access these plots by clicking the seven page tabs at the bottom of the **Graph Sheet**. The plots appear similar to those shown in Figure 6.36. Spotfire S+ prints the results of the linear regression in the **Report** window:

```
       *** Linear Model ***
Call: lm(formula = ozone ~ temperature, data = air,
   na.action = na.exclude)
Residuals:
   Min      1Q  Median     3Q   Max
 -1.49 -0.4258 0.02521 0.3636 2.044

Coefficients:
               Value Std. Error  t value Pr(>|t|)
(Intercept)  -2.2260   0.4614    -4.8243   0.0000
temperature   0.0704   0.0059    11.9511   0.0000

Residual standard error: 0.5885 on 109 degrees of freedom
Multiple R-Squared: 0.5672
F-statistic: 142.8 on 1 and 109 degrees of freedom, the
  p-value is 0
```

The `Value` column under `Coefficients` gives the coefficients of the linear model, allowing us to read off the estimated regression line as follows:

`ozone` = -2.2260 + 0.0704 × `temperature`

The column named `Std. Error` in the output gives the estimated standard error for each coefficient. The `Multiple R-Squared` term tells us that the model explains about 57% of the variation in `ozone`. The `F-statistic` is the ratio of the mean square of the regression to the estimated variance; if there is no relationship between temperature and ozone, this ratio has an F distribution with 1 and 109 degrees of freedom. The ratio here is clearly significant, so the true slope of the regression line is probably not 0.

Diagnostic plots for linear models

How good is the fitted linear regression model? Is temperature an adequate predictor of ozone concentration? Can we do better? Questions such as these are essential any time you try to explain data with a statistical model. It is not enough to fit a model; you must also assess how well the model fits the data, and be prepared to modify the model or abandon it altogether if it does not satisfactorily explain the data.

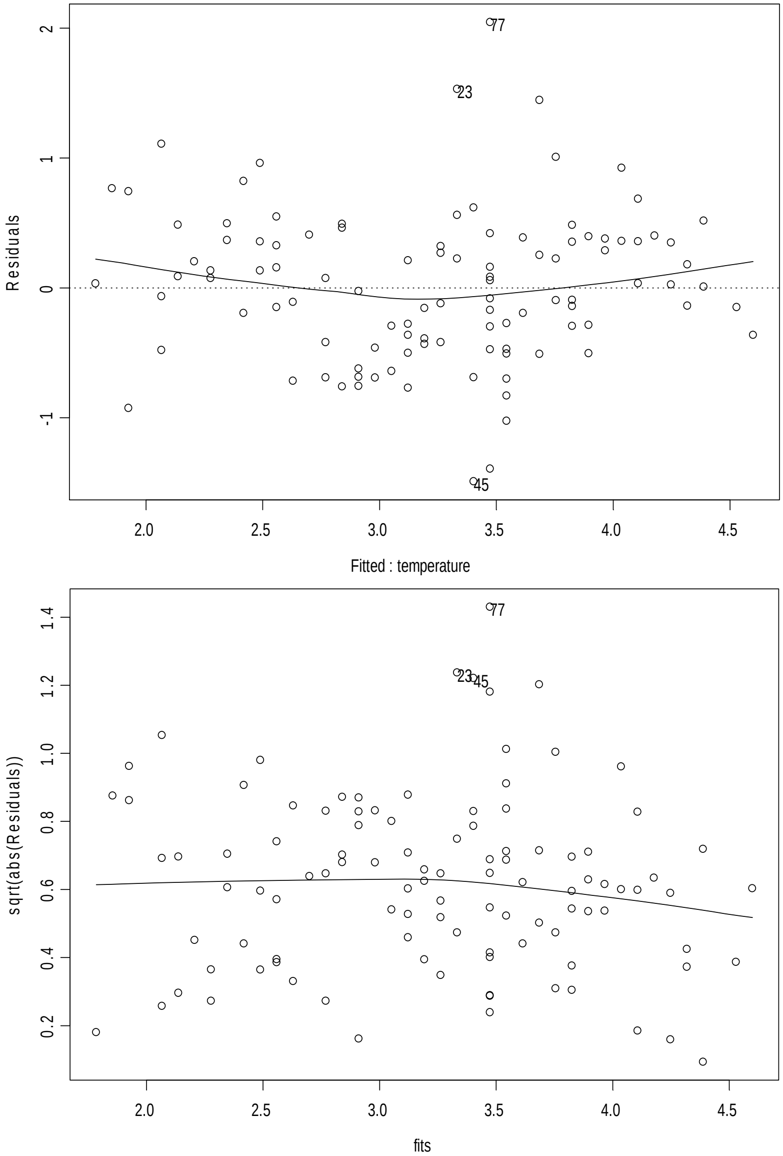


Figure 6.36: *Seven plots created by the* ***Linear Regression*** *dialog.*

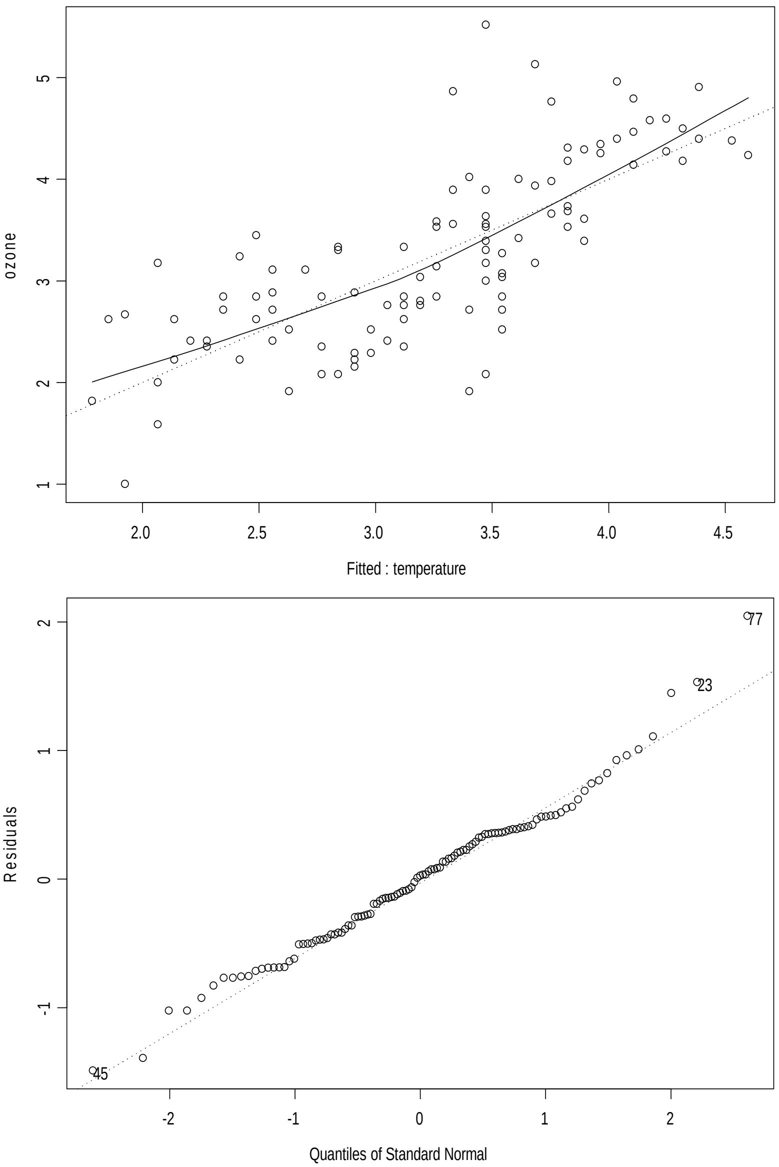


Figure 6.36: *Seven plots created by the **Linear Regression** dialog. (Continued)*

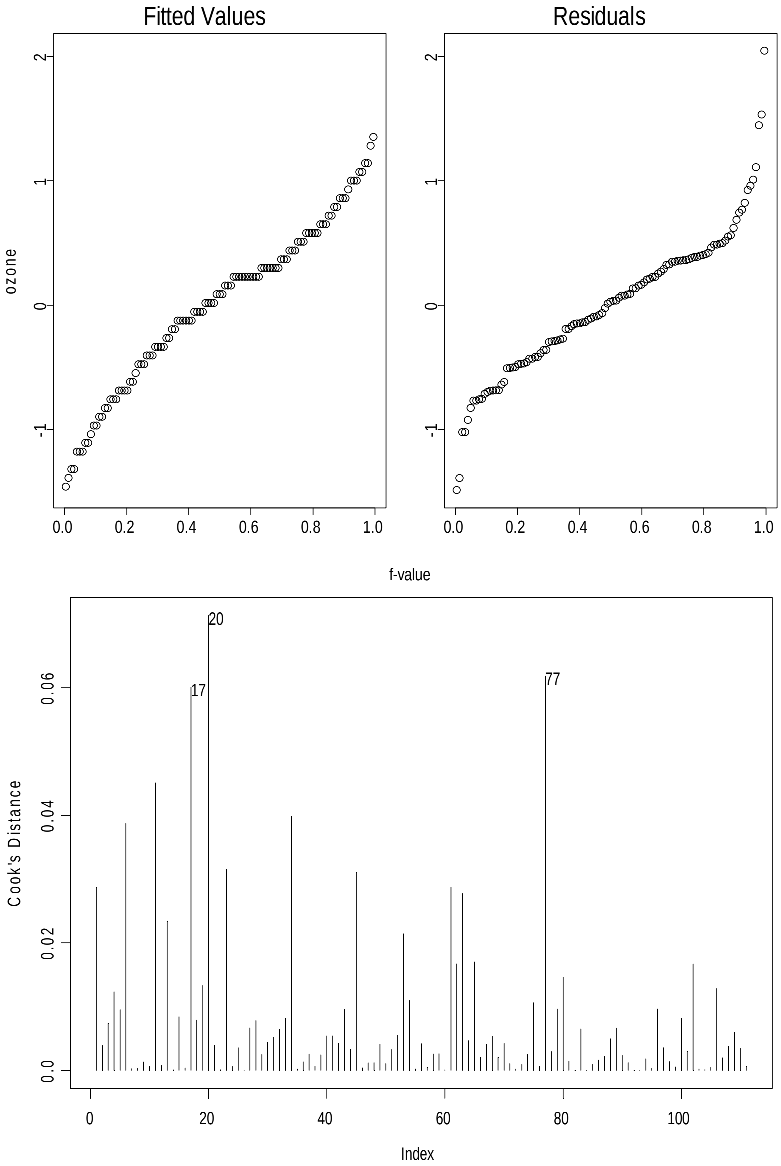


Figure 6.36: *Seven plots created by the* ***Linear Regression*** *dialog. (Continued)*

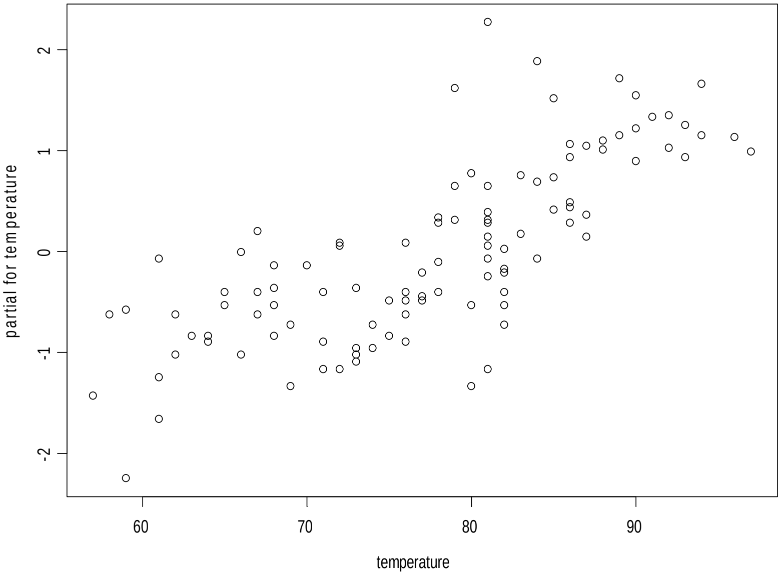


Figure 6.36: *Seven plots created by the* ***Linear Regression*** *dialog. (Continued)*

The simplest and most informative method for assessing the fit is to look at the model graphically, using an assortment of plots that, taken together, reveal the strengths and weaknesses of the model. For example, a plot of the response against the fitted values gives a good idea of how well the model has captured the broad outlines of the data. Examining a plot of the residuals against the fitted values often reveals unexplained structure left in the residuals, which should appear as nothing but noise in a strong model. The plotting options for the **Linear Regression** dialog provide these two plots, along with the following useful plots:

- *Square root of absolute residuals against fitted values*. This plot is useful in identifying outliers and visualizing structure in the residuals.
- *Normal quantile plot of residuals*. This plot provides a visual test of the assumption that the model's errors are normally distributed. If the ordered residuals cluster along the superimposed quantile-quantile line, you have strong evidence that the errors are indeed normal.

- *Residual-fit spread plot, or r-f plot.* This plot compares the spread of the fitted values with the spread of the residuals. Since the model is an attempt to explain the variation in the data, you hope that the spread in the fitted values is *much* greater than that in the residuals.
- *Cook's distance plot.* Cook's distance is a measure of the influence of individual observations on the regression coefficients.
- *Partial residual plot.* A partial residual plot is a plot of $r_i = b_k x_{ik}$ versus x_{ik}, where r_i is the ordinary residual for the *i*th observation, x_{ik} is the *i*th observation of the *k*th predictor, and b_k is the regression coefficient estimate for the *k*th predictor. Partial residual plots are useful for detecting nonlinearities and identifying possible causes of unduly large residuals.

The line $y = \hat{y}$ is shown as a dashed line in the third plot of the top row in Figure 6.36. In the case of simple regression, this line is visually equivalent to the regression line. The regression line appears to model the trend of the data reasonably well. The residuals plots (left two plots in the top row of Figure 6.36) show no obvious pattern, although five observations appear to be outliers. By default, the three most extreme values are identified in each of the residuals plots and in the Cook's distance plot.

Another useful diagnostic plot is the normal plot of residuals (right plot in the top row of Figure 6.36). The normal plot gives no reason to doubt that the residuals are normally distributed. The r-f plot, on the other hand (left plot in the bottom row of Figure 6.36), shows a weakness in this model: the spread of the residuals is actually greater than the spread in the original data. However, if we ignore the five outlying residuals, the residuals are more tightly grouped than the original data.

The Cook's distance plot shows four or five heavily influential observations. Because the regression line fits the data reasonably well, the regression is significant, and the residuals appear normally distributed, we feel justified in using the regression line as a way to estimate the ozone concentration for a given temperature. One important issue remains, however: the regression line explains only

57% of the variation in the data. We may be able to do somewhat better by considering the effect of other variables on the ozone concentration.

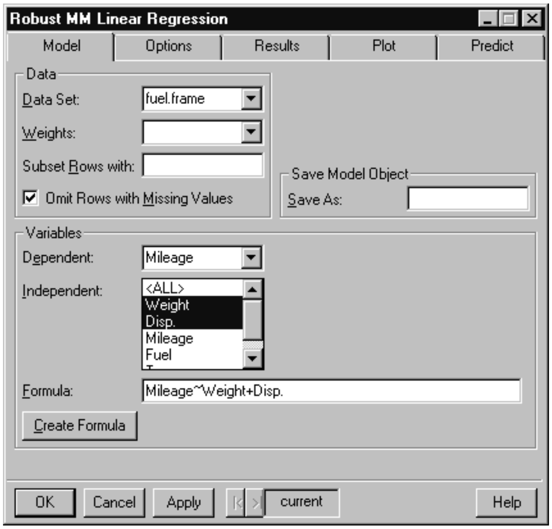
Robust MM Regression

Robust regression models are useful for fitting linear relationships when the random variation in the data is not Gaussian (normal), or when the data contain significant outliers. In such situations, standard linear regression may return inaccurate estimates.

The *robust MM regression* method returns a model that is almost identical in structure to a standard linear regression model. This allows the production of familiar plots and summaries with a robust model. The MM method is the robust regression procedure currently recommended by TIBCO.

Performing robust MM regression

From the main menu, choose **Statistics ► Regression ► Robust MM**. The **Robust MM Linear Regression** dialog opens, as shown in Figure 6.37.



Data Set: fuel.frame
Weights:
Subset Rows with:
☑ Omit Rows with Missing Values
Save As:
Dependent: Mileage
Independent: <ALL>
Weight
Disp.
Mileage
Fuel
Formula: Mileage~Weight+Disp.
current

Figure 6.37: *The **Robust MM Linear Regression** dialog.*

Example

The data set `fuel.frame` is taken from the April 1990 issue of *Consumer Reports.* It contains 60 observations (rows) and 5 variables (columns). Observations of weight, engine displacement, mileage, type, and fuel were taken for each of sixty cars. In the `fuel.frame` data, we predict `Mileage` by `Weight` and `Disp.` using robust MM regression.

1. Open the **Robust MM Linear Regression** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type `Mileage~Weight+Disp.` in the **Formula** field. Alternatively, select `Mileage` as the **Dependent** variable and CTRL-click to select `Weight` and `Disp.` as the **Independent** variables. As a third way of generating a formula, click the **Create Formula** button, select `Mileage` as the **Response** variable, and CTRL-click to select `Weight` and `Disp.` as the **Main Effects**. You can use the **Create Formula** button to create complicated linear models and learn the notation for model specifications. The online help discusses formula creation in detail.
4. Click **OK** to fit the robust MM regression model.

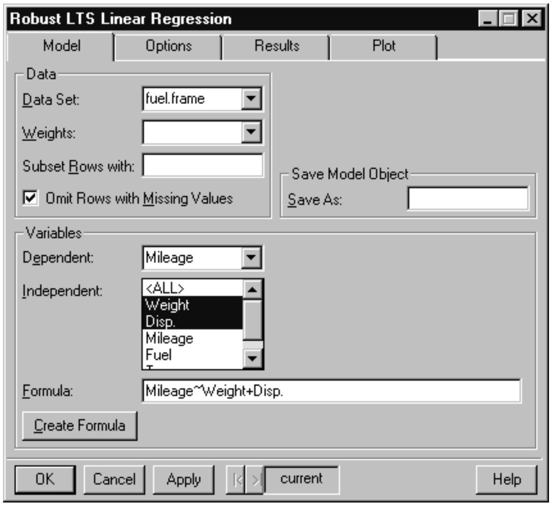
A summary of the model appears in the **Report** window. A warning regarding initial and final estimates may also appear in the **Message** window; for details about this warning message, see Chapter 11, Robust Regression, in the *Guide to Statistics, Volume 1*.

Robust LTS Regression

The *robust LTS regression* method performs least-trimmed-squares regression. It has less detailed plots and summaries than standard linear regression and robust MM regression.

Performing robust LTS regression

From the main menu, choose **Statistics ▶ Regression ▶ Robust LTS**. The **Robust LTS Linear Regression** dialog opens, as shown in Figure 6.38.



Data Set: fuel.frame

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Dependent: Mileage

Independent: <ALL>, Weight, Disp., Mileage, Fuel

Formula: Mileage~Weight+Disp.

Figure 6.38: *The **Robust LTS Linear Regression** dialog.*

Example

In the `fuel.frame` data, we predict `Mileage` by `Weight` and `Disp.` using robust LTS regression.

1. Open the **Robust LTS Linear Regression** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type `Mileage~Weight+Disp.` in the **Formula** field. Alternatively, select `Mileage` as the **Dependent** variable and CTRL-click to select `Weight` and `Disp.` as the **Independent** variables. As a third way of generating a formula, click the **Create Formula** button, select `Mileage` as the **Response** variable, and CTRL-click to select `Weight` and `Disp.` as the **Main Effects**. You can use the **Create Formula** button to create complicated linear models and learn the notation for model specifications. The online help discusses formula creation in detail.
4. Click **OK** to fit the robust LTS regression model.

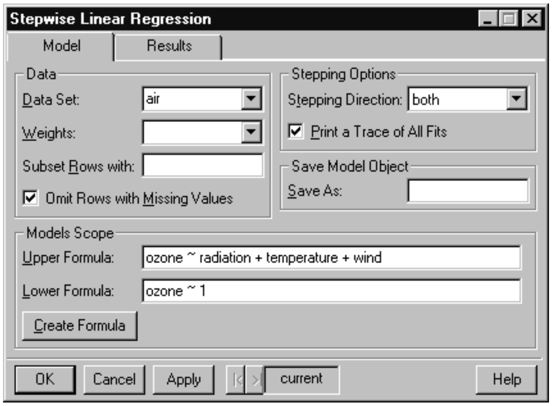
A summary of the model appears in the **Report** window.

Stepwise Linear Regression

One step in the modeling process is determining what variables to include in the regression model. *Stepwise linear regression* is an automated procedure for selecting which variables to include in a regression model. Forward stepwise regression adds terms to the model until additional terms no longer improve the goodness-of-fit. At each step the term is added that most improves the fit. Backward stepwise regression drops terms from the model so long as dropping terms does not significantly decrease the goodness-of-fit. At each step the term is dropped whose removal least degrades the fit. Stepwise regression also has the option of alternating between adding and dropping terms. This is the default method used.

Performing stepwise linear regression

From the main menu, choose **Statistics ► Regression ► Stepwise**. The **Stepwise Linear Regression** dialog opens, as shown in Figure 6.39.



Stepwise Linear Regression

Data

Data Set: air

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Stepping Options

Stepping Direction: both

☑ Print a Trace of All Fits

Save Model Object

Save As:

Models Scope

Upper Formula: ozone ~ radiation + temperature + wind

Lower Formula: ozone ~ 1

Figure 6.39: *The **Stepwise Linear Regression** dialog.*

Example

We apply stepwise regression to the `air` data.

1. Open the **Stepwise Linear Regression** dialog.
2. Type `air` in the **Data Set** field.
3. We must supply a formula representing the most complex model to consider. Specify `ozone ~ radiation + temperature + wind` as the **Upper Formula**.

4. We must also supply a formula representing the simplest model to consider. Specify `ozone ~ 1` as the **Lower Formula**. The `1` indicates inclusion of just an intercept term.
5. Click **OK**.

Stepwise regression uses the Cp statistic as a measure of goodness-of-fit. This is a statistic which rewards accuracy while penalizing model complexity. In this example, dropping any term yields a model with a Cp statistic that is smaller than that for the full model. Hence, the full model is selected as the best model.

The summary of the steps appears in the **Report** window.

```
  *** Stepwise Regression ***

  *** Stepwise Model Comparisons ***
Start:  AIC= 29.9302
 ozone ~ radiation + temperature + wind

Single term deletions

Model:
ozone ~ radiation + temperature + wind

scale:  0.2602624

            Df Sum of Sq      RSS       Cp
     <none>              27.84808 29.93018
  radiation  1   4.05928 31.90736 33.46893
temperature  1  17.48174 45.32982 46.89140
       wind  1   6.05985 33.90793 35.46950

  *** Linear Model ***

Call: lm(formula = ozone ~ radiation + temperature + wind,
data = air, na.action = na.exclude)
Residuals:
    Min      1Q   Median     3Q   Max
 -1.122 -0.3764 -0.02535 0.3361 1.495

Coefficients:
              Value Std. Error t value Pr(>|t|)
```

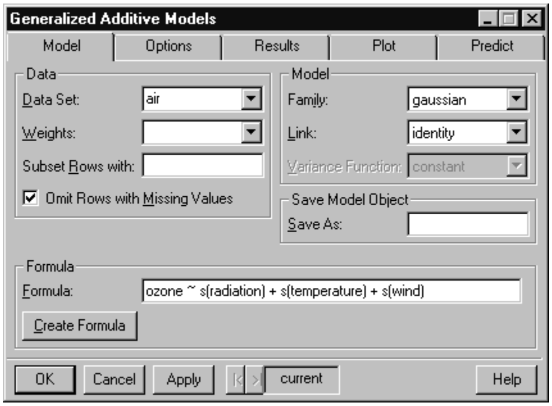
```
(Intercept) -0.2973  0.5552    -0.5355  0.5934
  radiation  0.0022  0.0006     3.9493  0.0001
temperature  0.0500  0.0061     8.1957  0.0000
       wind -0.0760  0.0158    -4.8253  0.0000

Residual standard error: 0.5102 on 107 degrees of freedom
Multiple R-Squared: 0.6807
F-statistic: 76.03 on 3 and 107 degrees of freedom, the
p-value is 0
```

Generalized Additive Models

Generalized additive models extend linear models by flexibly modeling additive nonlinear relationships between the predictors and the response. Whereas linear models assume that the response is linear in each predictor, additive models assume only that the response is affected by each predictor in a smooth way. The response is modeled as a sum of smooth functions in the predictors, where the smooth functions are estimated automatically using smoothers. Additive models may be useful for obtaining a final fit, or for exploring what types of variable transformations might be appropriate for use in a standard linear model.

Fitting an additive model

From the main menu, choose **Statistics** ► **Regression** ► **Generalized Additive**. The **Generalized Additive Models** dialog opens, as shown in Figure 6.40.



Data Set: air

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Family: gaussian

Link: identity

Variance Function: constant

Save As:

Formula: ozone ~ s(radiation) + s(temperature) + s(wind)

Figure 6.40: *The **Generalized Additive Models** dialog.*

Example

We fit an additive model for the `air` data.

1. Open the **Generalized Additive Models** dialog.
2. Type `air` in the **Data Set** field.
3. Specify `ozone ~ s(radiation) + s(temperature) + s(wind)` as the **Formula**.
4. On the **Plot** page of the dialog, select the **Partial Residuals** and **Include Partial Fits** check boxes. This indicates that we want plots of the partial residuals and partial fits for each predictor.
5. Click **OK**.

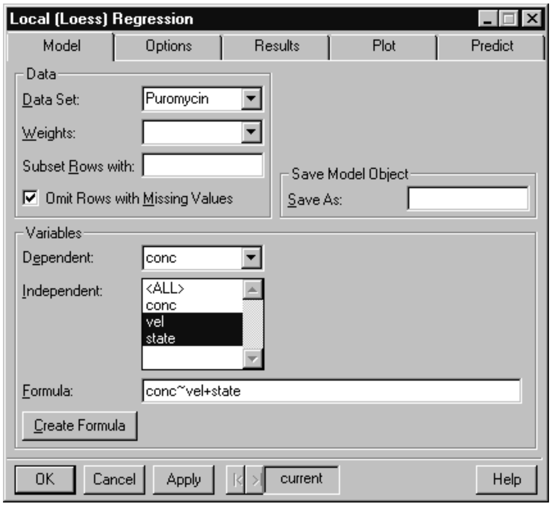
A summary of the additive model appears in the **Report** window. A multipage **Graph Sheet** appears with one partial residual plot on each page.

Local (Loess) Regression

Local regression is a nonparametric generalization of multivariate polynomial regression. It is best thought of as a way to fit general smooth surfaces. A wide variety of options are available for specifying the form of the surface.

Fitting a local regression

From the main menu, choose **Statistics ▶ Regression ▶ Local (Loess)**. The **Local (Loess) Regression** dialog opens, as shown in Figure 6.41.



Data Set: Puromycin

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Dependent: conc

Independent: <ALL> conc vel state

Formula: conc~vel+state

Figure 6.41: *The* ***Local (Loess) Regression*** *dialog.*

Example

The data set `Puromycin` has 23 rows representing the measurement of initial velocity of a biochemical reaction for 6 different concentrations of substrate and two different cell treatments. Nonlinear Regression on page 288 describes these data in detail and discusses a theoretical model for the data. Before fitting a theoretical model, we can use the **Local (Loess) Regression** dialog to fit nonparametric smooth curves to the data.

Our model consists of a separate curve for each treatment group. We predict the response `conc` by the variables `vel` and `state`. Since `state` is a factor, this fits a separate smooth curve in `vel` for each level of `state`.

1. Open the **Local (Loess) Regression** dialog.
2. Type `Puromycin` in the **Data Set** field.

3. Type `conc~vel+state` in the **Formula** field. Alternatively, select `conc` as the **Dependent** variable and CTRL-click to select `vel` and `state` as the **Independent** variables. As a third way of generating a formula, click the **Create Formula** button, select `conc` as the **Response** variable, and CTRL-click to select `vel` and `state` as the **Main Effects**. You can use the **Create Formula** button to create complicated linear models and learn the notation for model specifications. The online help discusses formula creation in detail.
4. On the **Plot** page of the dialog, select **Cond. Plots of Fitted vs Predictors**. This type of plot displays a separate plot in one variable for different subsets of another variable. In our case, it plots a separate curve for each level of `state`.
5. Click **OK**.

A summary of the loess model is presented in the **Report** window, and a **Graph Sheet** displays the conditional plot.

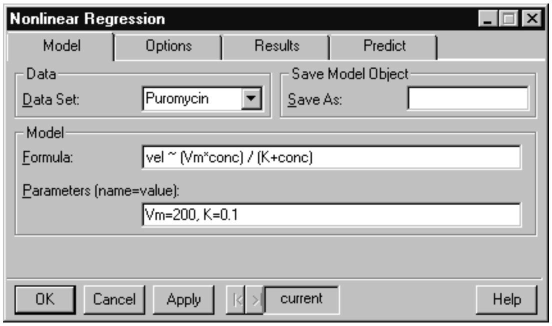
Nonlinear Regression

Nonlinear regression uses a specific nonlinear relationship to predict a continuous variable from one or more predictor variables. The form of the nonlinear relationship is usually derived from an application-specific theoretical model.

The **Nonlinear Regression** dialog fits a nonlinear regression model. To use nonlinear regression, specify the form of the model in S-PLUS syntax and provide starting values for the parameter estimates.

Fitting a nonlinear least squares regression

From the main menu, choose **Statistics ▶ Regression ▶ Nonlinear**. The **Nonlinear Regression** dialog opens, as shown in Figure 6.42.



Data

Data Set: Puromycin

Save Model Object

Save As:

Model

Formula: vel ~ (Vm*conc) / (K+conc)

Parameters (name=value): Vm=200, K=0.1

Figure 6.42: *The **Nonlinear Regression** dialog.*

Example

The data set `Puromycin` has 23 rows representing the measurement of initial velocity of a biochemical reaction for 6 different concentrations of substrate and two different cell treatments. Figure 6.43 plots velocity versus concentration with different symbols for the two treatment groups (treated and untreated).

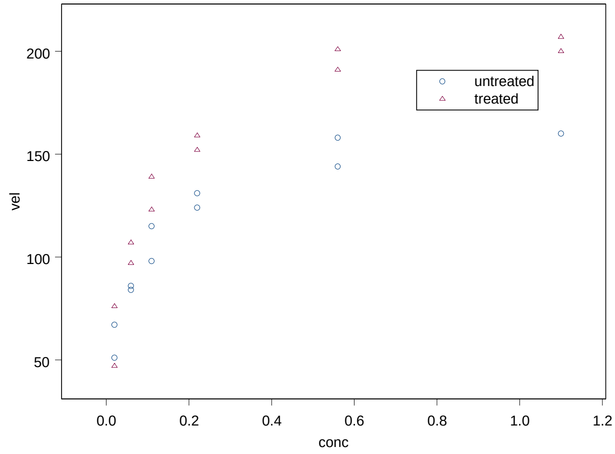


Figure 6.43: *Scatter plot of the `Puromycin` data.*

The relationship between velocity and concentration is known to follow a Michaelis-Menten relationship:

$$V = \frac{V_{max}c}{K + c} + \varepsilon$$

where V is the velocity, c is the enzyme concentration, V_{max} is a parameter representing the asymptotic velocity as $c \to \infty$, K is the Michaelis parameter, and ε is experimental error. Assuming the treatment with the drug would change V_{max} but not K, the optimization function is:

$$S(V_{max}, K) = \sum\left(V_i - \frac{(V_{max} + \Delta V_{max}I_{\{treated\}}(state))c_i}{K + c_i}\right)^2$$

where $I_{\{treated\}}$ is the function indicating whether the cell was treated with Puromycin.

We first fit the simpler model in which a single curve is fit for both groups. We then add a term reflecting the influence of treatment.

In order to fit a nonlinear regression model, we must specify the form of the nonlinear model, the name of the data set, and starting values for the parameter estimates. Examination of Figure 6.43 suggests starting values of `V=200` and `K=0.1`, treating all observations as a single group. We fit a Michaelis-Menten relationship between velocity and concentration as follows:

1. Open the **Nonlinear Regression** dialog.
2. Type `Puromycin` in the **Data Set** field.
3. Type the Michaelis-Menten relationship `vel~(Vm*conc)/(K+conc)` into the **Formula** field.
4. Type the parameter starting values `Vm=200, K=0.1` into the **Parameters** field.
5. Click **OK**.

The following results appear in the **Report** window.

```
*** Nonlinear Regression Model ***
```

```
Formula: vel ~ (Vm * conc)/(K + conc)

Parameters:
         Value Std. Error  t value
Vm 190.8050000  8.7644700 21.77030
 K   0.0603863  0.0107682  5.60785

Residual standard error: 18.6146 on 21 degrees of freedom

Correlation of Parameter Estimates:
     Vm
K 0.776
```

The printed results provide parameter estimates, standard errors, and *t* values, as well as the residual standard error and correlation of parameter estimates.

We now fit a model containing a treatment effect:

1. Open the **Nonlinear Regression** dialog.
2. Type `Puromycin` in the **Data Set** field.
3. Type the Michaelis-Menten relationship `vel ~ ((Vm+delV * (state == "treated")) * conc)/(K + conc)` into the **Formula** field.
4. Figure 6.43 suggests starting values of `Vm=160` and `delV=40`, while the previous model suggests `K=0.05`. Type the starting values `Vm=160, delV=40, K=0.05` into the **Parameters** field.
5. Click **OK**.

The following results appear in the **Report** window.

```
  *** Nonlinear Regression Model ***

Formula: vel ~ ((Vm + delV * (state == "treated")) * conc)/
(K + conc)

Parameters:
           Value Std. Error  t value
  Vm 166.6010000 5.80726000 28.68840
delV  42.0245000 6.27201000  6.70032
   K   0.0579659 0.00590968  9.80863
```

```
Residual standard error: 10.5851 on 20 degrees of freedom

Correlation of Parameter Estimates:
          Vm    delV
delV -0.5410
   K  0.6110  0.0644
```

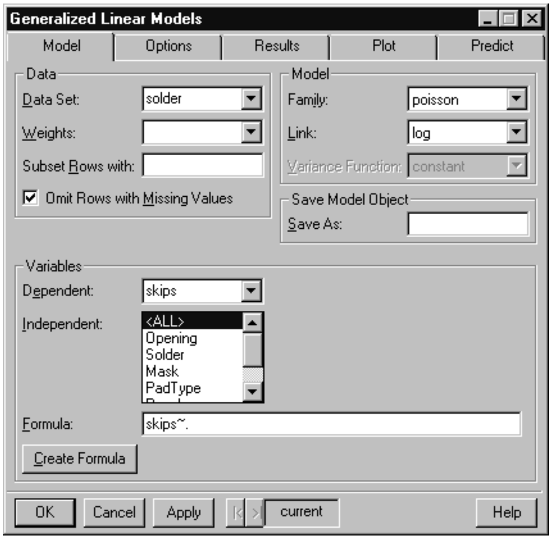
The printed results provide parameter estimates, standard errors, and *t* values, as well as the residual standard error and correlation of parameter estimates. The magnitude of the *t* statistic for `delV` confirms that the treatment affects the maximum velocity.

Generalized Linear Models

Generalized linear models are generalizations of the familiar linear regression model to situations where the response is discrete or the model varies in other ways from the standard linear model. The most widely used generalized linear models are logistic regression models for binary data and log-linear (Poisson) models for count data.

Fitting a generalized linear model

From the main menu, choose **Statistics ▶ Regression ▶ Generalized Linear**. The **Generalized Linear Models** dialog opens, as shown in Figure 6.44.



Data Set: solder

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Family: poisson

Link: log

Variance Function: constant

Save As:

Dependent: skips

Independent: <ALL> Opening Solder Mask PadType

Formula: skips~.

Figure 6.44: *The **Generalized Linear Models** dialog.*

Example

The `solder` data set contains 900 observations (rows) that are the results of an experiment that varied five factors relevant to the wave-soldering procedure for mounting components on printed circuit boards. The response variable `skips` is a count of how many solder skips appeared in a visual inspection. We can use the **Generalized Linear Models** dialog to assess which process variables affect the number of skips.

1. Open the **Generalized Linear Models** dialog.
2. Type `solder` in the **Data Set** field.
3. Select `skips` as the **Dependent** variable and **<ALL>** in the **Independent** variable list. This generates `skips ~ .` in the **Formula** field.

4. Select `poisson` as the **Family**. The **Link** changes to `log`, which is the canonical link for a Poisson model.

5. Click **OK**.

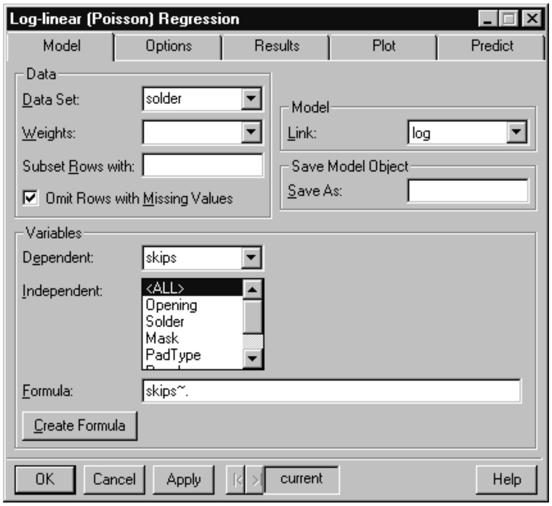
A summary of the Poisson regression appears in the **Report** window.

Log-Linear (Poisson) Regression

Count data are frequently modeled using *log-linear regression*. In log-linear regression, the response is assumed to be generated from a Poisson distribution, with a centrality parameter that depends upon the values of the covariates.

Fitting a log-linear (Poisson) regression

From the main menu, choose **Statistics ▶ Regression ▶ Log-linear (Poisson)**. The **Log-linear (Poisson) Regression** dialog opens, as shown in Figure 6.45.



Data Set: solder

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Link: log

Save As:

Dependent: skips

Independent: <ALL> Opening Solder Mask PadType

Formula: skips~.

Figure 6.45: *The* ***Log-linear (Poisson) Regression*** *dialog.*

Example

In this example, we fit a Poisson regression to the `solder` data.

1. Open the **Log-linear (Poisson) Regression** dialog.

2. Type `solder` in the **Data Set** field.

3. Select `skips` as the **Dependent** variable and **<ALL>** in the **Independent** variable list. This generates `skips ~ .` in the **Formula** field.

4. Click **OK**.

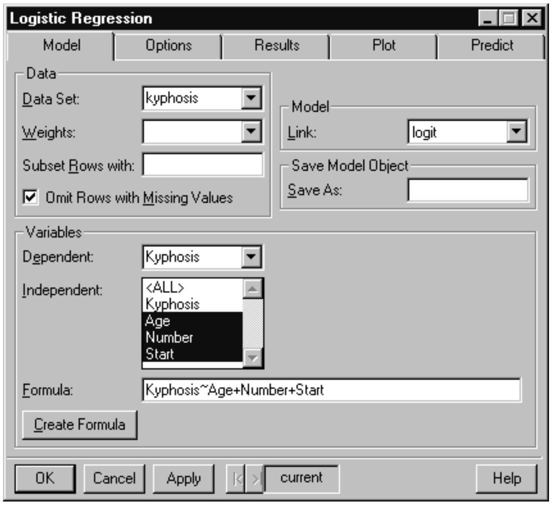
A summary of the log-linear regression appears in the **Report** window. The t values in the resulting table of coefficients are all fairly large, indicating that all of the process variables have a significant influence upon the number of skips generated.

Logistic Regression

Logistic regression models the relationship between a dichotomous response variable and one or more predictor variables. A linear combination of the predictor variables is found using maximum likelihood estimation, where the response variable is assumed to be generated by a binomial process whose probability parameter depends upon the values of the predictor variables.

Fitting a logistic regression

From the main menu, choose **Statistics ▶ Regression ▶ Logistic**. The **Logistic Regression** dialog opens, as shown in Figure 6.46.



Data Set: kyphosis

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Link: logit

Save As:

Dependent: Kyphosis

Independent: <ALL> Kyphosis Age Number Start

Formula: Kyphosis~Age+Number+Start

Figure 6.46: *The* ***Logistic Regression*** *dialog.*

Example

The data set kyphosis has 81 rows representing data on 81 children who have had corrective spinal surgery. The outcome Kyphosis is a binary variable, and the other three variables, Age, Number, and Start, are numeric. Figure 6.47 displays box plots of Age, Number, and Start for each level of Kyphosis.

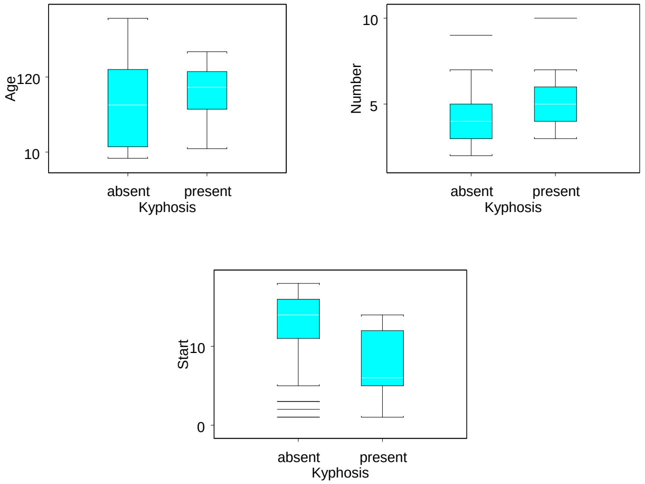


Figure 6.47: *Box plots of the Kyphosis data.*

Kyphosis is a postoperative spinal deformity. We are interested in exploring how the covariates influence whether or not the deformity occurs. Both Start and Number show strong location shifts with respect to the presence or absence of Kyphosis. The Age variable does not show such a shift in location. We can use logistic regression to quantify the influence of each covariate upon the likelihood of deformity.

1. Open the **Logistic Regression** dialog.
2. Type kyphosis in the **Data Set** field.
3. Specify Kyphosis~Age+Number+Start in the **Formula** field.
4. Click **OK**.

A summary of the logistic regression appears in the **Report** window. The summary contains information on the residuals, coefficients, and deviance. The high t value for Start indicates that it has a significant influence upon whether kyphosis occurs. The *t* values for `Age` and `Number` are not large enough to display a significant influence upon the response.

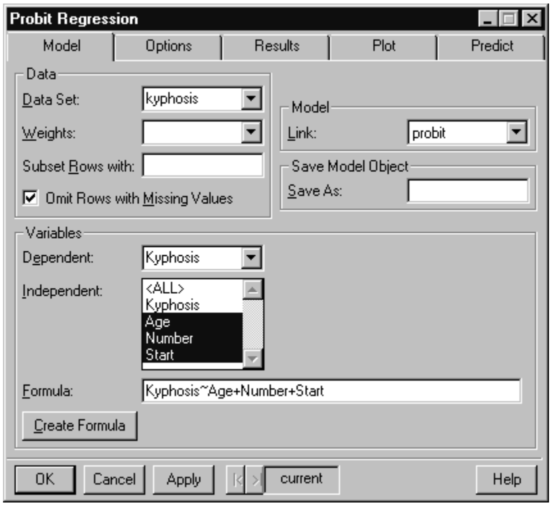
```
  *** Generalized Linear Model ***

Call: glm(formula = Kyphosis ~ Age + Number + Start,
  family = binomial(link = logit), data = kyphosis,
  na.action = na.exclude, control = list(
  epsilon = 0.0001, maxit = 50, trace = F))

Deviance Residuals:
       Min         1Q     Median         3Q     Max
 -2.312363 -0.5484308 -0.3631876 -0.1658653 2.16133

Coefficients:
                  Value Std. Error   t value
(Intercept) -2.03693225 1.44918287 -1.405573
        Age  0.01093048 0.00644419  1.696175
     Number  0.41060098 0.22478659  1.826626
      Start -0.20651000 0.06768504 -3.051043

(Dispersion Parameter for Binomial family taken to be 1 )

    Null Deviance: 83.23447 on 80 degrees of freedom

Residual Deviance: 61.37993 on 77 degrees of freedom

Number of Fisher Scoring Iterations: 5
```

Probit Regression

The **Probit Regression** dialog fits a probit response model. This is a variation of logistic regression suitable for binomial response data.

Fitting a probit regression model

From the main menu, choose **Statistics** ► **Regression** ► **Probit**. The **Probit Regression** dialog opens, as shown in Figure 6.48.



Data Set: kyphosis

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Link: probit

Save As:

Dependent: Kyphosis

Independent: <ALL> Kyphosis Age Number Start

Formula: Kyphosis~Age+Number+Start

Figure 6.48: *The **Probit Regression** dialog.*

Example

In this example, we fit a probit regression model to the `kyphosis` data set:

1. Open the **Probit Regression** dialog.
2. Type `kyphosis` in the **Data Set** field.
3. Specify `Kyphosis~Age+Number+Start` in the **Formula** field.
4. Click **OK**.

A summary of the model is printed in the **Report** window.

```
  *** Generalized Linear Model ***

Call: glm(formula = Kyphosis ~ Age + Number + Start,
  family = binomial(link = probit), data = kyphosis,
  na.action = na.exclude, control = list(epsilon =
  0.0001, maxit = 50, trace = F))
Deviance Residuals:
       Min         1Q     Median         3Q      Max
 -2.217301 -0.5440968 -0.3535132 -0.124005 2.149486
```

```
Coefficients:
                   Value  Std. Error   t value
(Intercept) -1.063353291 0.809886949 -1.312965
        Age  0.005984768 0.003507093  1.706475
     Number  0.215179016 0.121687912  1.768286
      Start -0.120214682 0.038512786 -3.121423

(Dispersion Parameter for Binomial family taken to be 1 )

    Null Deviance: 83.23447 on 80 degrees of freedom

Residual Deviance: 61.0795 on 77 degrees of freedom

Number of Fisher Scoring Iterations: 5
```

ANALYSIS OF VARIANCE

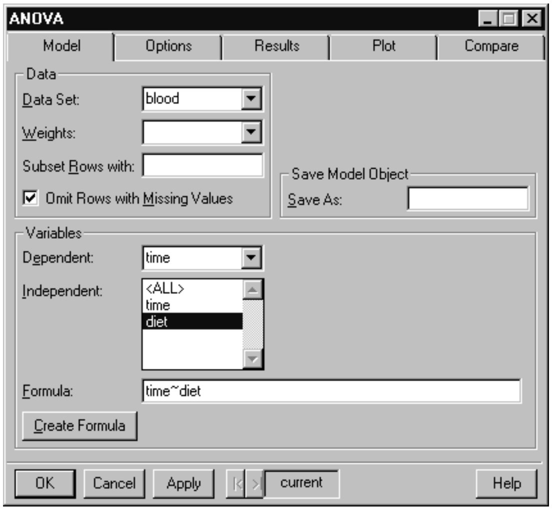
Analysis of variance (ANOVA) is generally used to explore the influence of one or more categorical variables upon a continuous response.

Fixed Effects ANOVA

The **ANOVA** dialog performs classical fixed effects analysis of variance.

Fitting a fixed effects an ANOVA model

From the main menu, choose **Statistics ► ANOVA ► Fixed Effects**. The **ANOVA** dialog opens, as shown in Figure 6.49.



Data Set: blood

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Dependent: time

Independent: <ALL>, time, diet

Formula: time~diet

Figure 6.49: *The **ANOVA** dialog.*

Example

In One-Way Analysis of Variance on page 234, we performed a simple one-way ANOVA on the `blood` data set listed in Table 6.2. These data give the blood coagulation times for four different diets. In general, the **ANOVA** dialog can handle far more complicated designs than the one-way ANOVA dialog. In addition, it generates diagnostic plots and provides more information on the results of the analysis. We use the **ANOVA** dialog to reproduce the results of the earlier example. We also generate some diagnostic plots to see how well our model suits our data.

1. If you have not done so already, create the `blood` data set with the instructions given on page 236.
2. Open the **ANOVA** dialog.
3. Enter `blood` as the **Data Set**.
4. Enter the formula `time ~ diet` for the one-way ANOVA we are going to perform. Alternatively, select `time` as the **Dependent** variable and `diet` as the **Independent** variable. As a third way of generating a formula, click the **Create Formula** button, select `time` as the **Response** variable and `diet` as a **Main Effect**. You can use the **Create Formula** button to create complicated linear models and learn the notation for model specifications. The online help discusses formula creation in detail.
5. Click on the **Plot** page and check all seven possible plots.
6. Click **OK** to do the analysis.

Spotfire S+ generates seven diagnostic plots. You can access these plots by clicking the seven page tabs at the bottom of the **Graph Sheet**. The plots do not reveal any significant problems in our model. The **Report** window displays the results of the ANOVA.

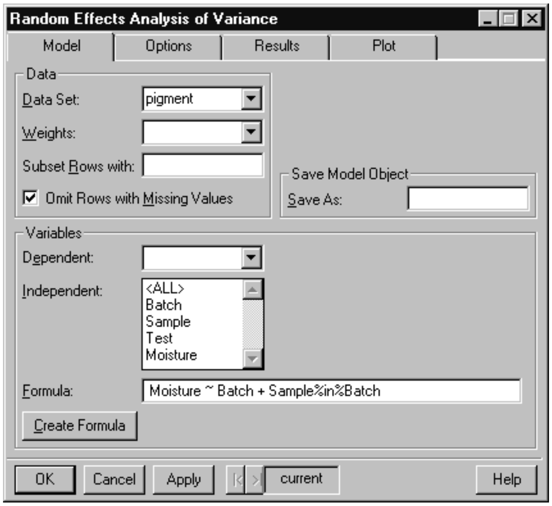
Random Effects ANOVA

Random effects ANOVA is used in balanced designed experiments where the treatment effects are taken to be random. The model must be balanced, and the model must be fully random. Only single strata designs are allowed.

For mixed effect models, use the **Linear Mixed Effects** dialog.

Fitting a random effects ANOVA model

From the main menu, choose **Statistics ▶ ANOVA ▶ Random Effects**. The **Random Effects Analysis of Variance** dialog opens, as shown in Figure 6.50.



Data Set: pigment

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Dependent:

Independent: <ALL> Batch Sample Test Moisture

Formula: Moisture ~ Batch + Sample%in%Batch

Figure 6.50: *The* ***Random Effects Analysis of Variance*** *dialog.*

Example

The `pigment` data set has 60 rows and 4 columns. The rows represent 15 batches of pigment for which 2 samples were drawn from each batch, and 2 analyses were made on each sample. These data are from a designed experiment of moisture content where samples are nested within batch. We fit a random effects ANOVA model to assess the within-batch and between-batch variation.

1. Open the **Random Effects Analysis of Variance** dialog.
2. Type `pigment` in the **Data Set** field.
3. Enter the following **Formula**:

   ```
   Moisture ~ Batch + Sample %in% Batch
   ```

   or click the **Create Formula** button and use the **Formula** builder to construct the formula. Use the **Special Terms** group with **Term Category** of **nested effect** to create the term `Sample %in% Batch`.
4. Click **OK**.

A summary of the model is printed in the **Report** window.

Multiple Comparisons

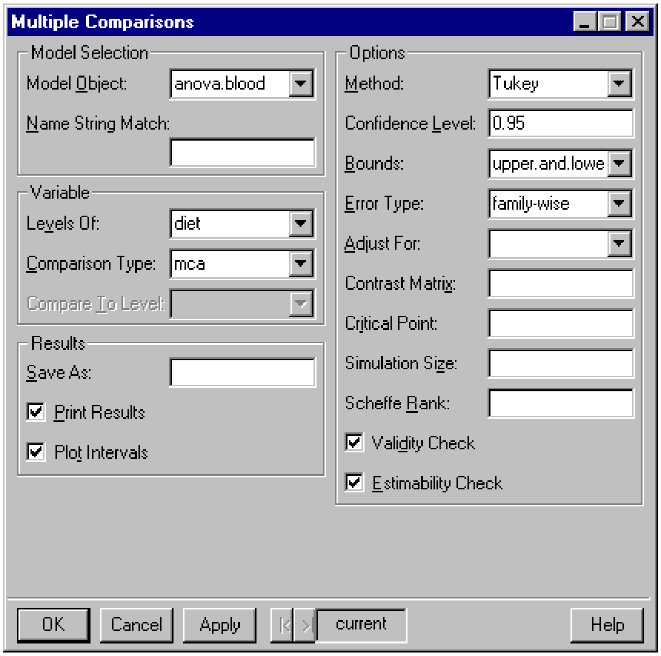
Analysis of variance models are typically used to compare the effects of several treatments upon some response. After an analysis of variance model has been fit, it is often of interest to determine whether any significant differences exist between the responses for the various treatment groups and, if so, to estimate the size of the differences. *Multiple comparisons* provides tests for equality of effects and also estimates treatment effects.

The **Multiple Comparisons** dialog calculates simultaneous or non-simultaneous confidence intervals for any number of estimable linear combinations of the parameters in a fixed-effects linear model. It requires the name of an analysis of variance model (`aov`) or linear model (`lm`), and specification of which effects are of interest.

The multiple comparisons functionality is also available on the **Compare** page of the **ANOVA** dialog.

Performing multiple comparisons

From the main menu, choose **Statistics ► ANOVA ► Multiple Comparisons**. The **Multiple Comparisons** dialog opens, as shown in Figure 6.51.



Model Selection

Model Object: anova.blood

Name String Match:

Variable

Levels Of: diet

Comparison Type: mca

Compare To Level:

Results

Save As:

☑ Print Results

☑ Plot Intervals

Options

Method: Tukey

Confidence Level: 0.95

Bounds: upper.and.lowe

Error Type: family-wise

Adjust For:

Contrast Matrix:

Critical Point:

Simulation Size:

Scheffe Rank:

☑ Validity Check

☑ Estimability Check

Figure 6.51: *The **Multiple Comparisons** dialog.*

Example

In One-Way Analysis of Variance on page 234, we performed a simple one-way ANOVA on the `blood` data set listed in Table 6.2. These data give the blood coagulation times for four different diets. In Fixed Effects ANOVA on page 300**,** we revisited the `blood` data set and concluded that diet affects blood coagulation times. The next step is to generate multiple simultaneous confidence intervals to see which diets are different from each other. We can do this using either the **Compare** page on the **ANOVA** dialog or the **Multiple Comparisons** dialog.

1. If you have not done so already, create the `blood` data set with the instructions given on page 236.
2. If you have not done so already, perform the one-way analysis of variance on page 235 and save the results in the object `anova.blood`.
3. Open the **Multiple Comparisons** dialog.

4. Select `anova.blood` as the **Model Object** from the pull-down menu.

5. We want to compare the levels of `diet` using Tukey's multiple comparison procedure. Select `diet` from the pull-down menu for **Levels Of** and set the **Method** to **Tukey**.

6. Click **OK** to generate the multiple comparisons.

The **Report** window displays the result:

```
95 % simultaneous confidence intervals for specified
linear combinations, by the Tukey method

critical point: 2.7987
response variable: time

intervals excluding 0 are flagged by '****'

      Estimate Std.Error Lower Bound Upper Bound
A-B -5.00e+000      1.53       -9.28      -0.725 ****
A-C -7.00e+000      1.53      -11.30      -2.720 ****
A-D -8.93e-014      1.45       -4.06       4.060
B-C -2.00e+000      1.37       -5.82       1.820
B-D  5.00e+000      1.28        1.42       8.580 ****
C-D  7.00e+000      1.28        3.42      10.600 ****
```

From the above results and from the plot of the confidence intervals, we can see that diets A and D produce significantly different blood coagulation times than diets C and B.

MIXED EFFECTS

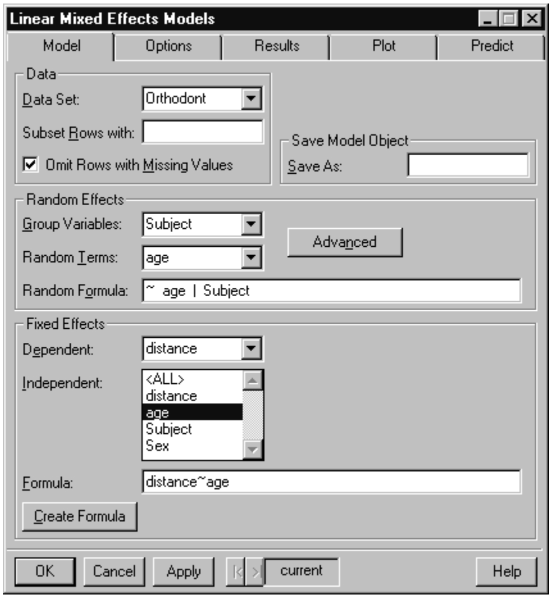
Mixed effects models are regression or ANOVA models that include both fixed and random effects.

Linear

The **Linear Mixed Effects Models** dialog fits a linear mixed-effects model in the formulation of Laird and Ware (1982), but allows for nested random effects.

Fitting a linear mixed effects model

From the main menu, choose **Statistics ► Mixed Effects ► Linear**. The **Linear Mixed Effects Models** dialog opens, as shown in Figure 6.52.



Data Set: Orthodont

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Group Variables: Subject

Random Terms: age

Random Formula: ~ age | Subject

Dependent: distance

Independent: <ALL>, distance, age, Subject, Sex

Formula: distance~age

Figure 6.52: *The* ***Linear Mixed Effects Models*** *dialog.*

Example

The Orthodont data set has 108 rows and four columns, and contains an orthodontic measurement on eleven girls and sixteen boys at four different ages. We use a linear mixed-effects model to determine the change in distance with age. The model includes fixed and random effects of age, with Subject indicating the grouping of measurements.

1. Open the **Linear Mixed Effects Models** dialog.
2. Type Orthodont in the **Data Set** field.
3. Specify distance~age in the **Formula** field.
4. Select Subject as a **Group Variable** and age as a **Random Term**. The **Random Formula** field is automatically filled in as ~ age|Subject.
5. Click **OK**.

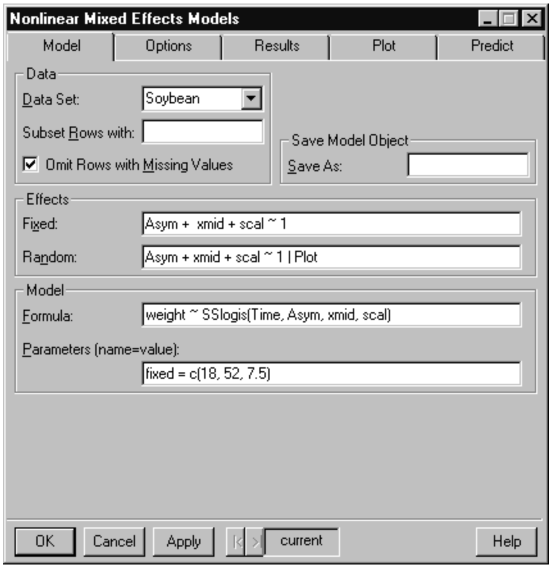
A summary of the model is printed in the **Report** window. If Spotfire S+ recognizes the data set as a groupedData structure, the **Formula** and **Random Formula** fields are filled in automatically by the formula extractor for groupedData objects. For more details, see Chapter 14, Linear and Nonlinear Mixed-Effects Models, in the *Guide to Statistics, Volume 1*.

Nonlinear

The **Nonlinear Mixed Effects Models** dialog fits a nonlinear mixed-effects model in the formulation described in Lindstrom and Bates (1990), but allows for nested random effects.

Fitting a nonlinear mixed effects model

From the main menu, choose **Statistics ► Mixed Effects ► Nonlinear**. The **Nonlinear Mixed Effects Models** dialog opens, as shown in Figure 6.53.



Data

Data Set: Soybean

Subset Rows with:

☑ Omit Rows with Missing Values

Save Model Object

Save As:

Effects

Fixed: Asym + xmid + scal ~ 1

Random: Asym + xmid + scal ~ 1 | Plot

Model

Formula: weight ~ SSlogis(Time, Asym, xmid, scal)

Parameters (name=value): fixed = c(18, 52, 7.5)

Figure 6.53: *The* ***Nonlinear Mixed Effects Models*** *dialog.*

Example

The Soybean data comes from an experiment that compares growth patterns of two genotypes of soybeans. Variables include a factor giving a unique identifier for each plot (Plot), a factor indicating which variety of soybean is in the plot (Variety), the year the plot was planted (Year), the time each sample was taken (time), and the average leaf weight per plant (weight). We are interested in modeling weight as a function of Time in a logistic model with parameters Asym, xmid, and scal. These parameters have both fixed and random effects. The grouping variable is Plot.

1. Open the **Nonlinear Mixed Effects Models** dialog.
2. Type Soybean in the **Data Set** field.

3. Type the following **Formula**:

   ```
   weight ~ SSlogis(Time, Asym, xmid, scal)
   ```

   This specifies that we want to predict `weight` by a function `SSlogis` of the variables `Time`, `Asym`, `xmid`, and `scal`. The `SSlogis` function is a *self-starting* function used to specify the nonlinear model, as well as provide initial estimates to the solver.

4. Specify starting fixed effect parameter estimates in the **Parameters (name=value)** field:

   ```
   fixed=c(18, 52, 7.5)
   ```

5. Specify that `Asym`, `xmid`, and `scal` are the fixed effects variables by typing the following formula in the **Fixed** field under **Effects**:

   ```
   Asym + xmid + scal ~ 1
   ```

6. Specify that `Asym`, `xmid`, and `scal` are the random effects variables and that `Plot` is the grouping variable by typing the following formula in the **Random** field under **Effects**:

   ```
   Asym + xmid + scal ~ 1 | Plot
   ```

7. Click **OK**.

A summary of the fitted model appears in the **Report** window.

GENERALIZED LEAST SQUARES

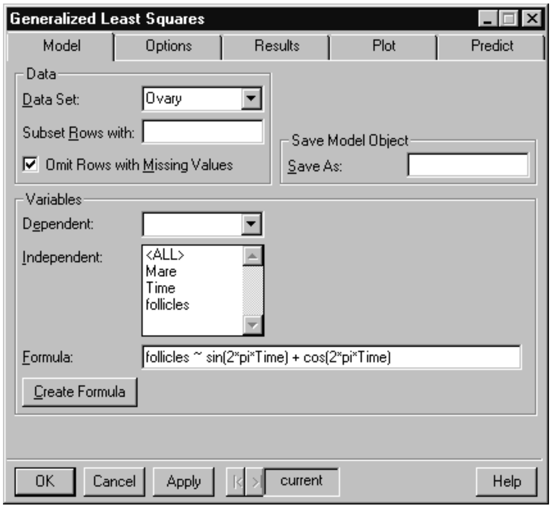
Generalized least squares models are regression or ANOVA models in which the residuals have a nonstandard covariance structure. The covariance structures supported include correlated and heteroscedastic residuals.

Linear

The **Generalized Least Squares** dialog fits a linear model using generalized least squares. Errors are allowed to be correlated and/or have unequal variances.

Performing generalized least squares regression

From the main menu, choose **Statistics ▶ Generalized Least Squares ▶ Linear**. The **Generalized Least Squares** dialog opens, as shown in Figure 6.54.



Data Set: Ovary

☑ Omit Rows with Missing Values

Formula: follicles ~ sin(2*pi*Time) + cos(2*pi*Time)

Figure 6.54: *The **Generalized Least Squares** dialog.*

Example

The `Ovary` data set has 308 rows and three columns giving the number of ovarian follicles detected in different mares at different times in their estrus cycles. Biological models suggest that the number of follicles may be modeled as a linear combination of the sine and cosine of `2*pi*Time`. We expect that the variation increases with `Time`, and hence use generalized least squares with a `Power` variance structure instead of standard linear regression. In a `Power` variance structure, the variance increases with a power of the absolute fitted values.

1. Open the **Generalized Least Squares** dialog.
2. Type `Ovary` in the **Data Set** field.
3. Enter the following **Formula**:

   ```
   follicles ~ sin(2*pi*Time) + cos(2*pi*Time)
   ```

4. On the **Options** page of the dialog, select **Power** as the **Variance Structure Type**.
5. Click **OK**.

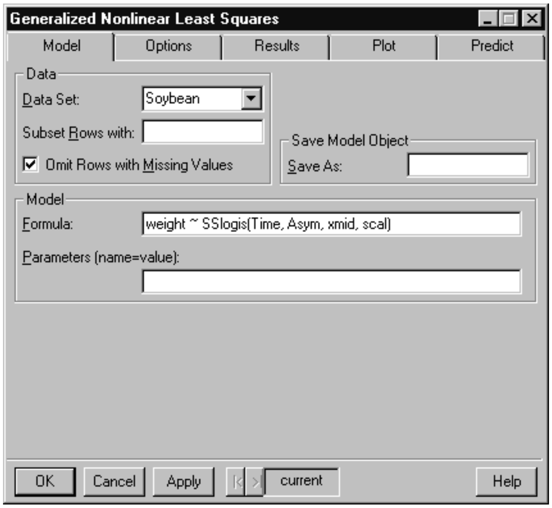
A summary of the fitted model appears in the **Report** window.

Nonlinear

The **Generalized Nonlinear Least Squares** dialog fits a nonlinear model using generalized least squares. The errors are allowed to be correlated and/or have unequal variances.

Performing generalized nonlinear least squares regression

From the main menu, choose **Statistics** ► **Generalized Least Squares** ► **Nonlinear**. The **Generalized Nonlinear Least Squares** dialog opens, as shown in Figure 6.55.



Data Set: Soybean

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Formula: weight ~ SSlogis(Time, Asym, xmid, scal)

Parameters (name=value):

Figure 6.55: *The* ***Generalized Nonlinear Least Squares*** *dialog.*

Example

The `Soybean` data comes from an experiment to compare growth patterns of two genotypes of soybeans. Variables include a factor giving a unique identifier for each plot (`Plot`), a factor indicating which variety of soybean is in the plot (`Variety`), the year the plot was planted (`Year`), the time each sample was taken (`time`), and the average leaf weight per plant (`weight`). We are interested in modeling `weight` as a function of `Time` in a logistic model with parameters `Asym`, `xmid`, and `scal`. We expect that the variation increases with time, and hence use generalized least squares with a `Power` variance structure instead of standard nonlinear regression. In a `Power` variance structure, the variance increases with a power of the absolute fitted values.

1. Open the **Generalized Nonlinear Least Squares** dialog.
2. Type `Soybean` in the **Data Set** field.
3. Enter the following **Formula**:

   ```
   weight ~ SSlogis(Time, Asym, xmid, scal)
   ```

   The `SSlogis` function is a *self-starting* function used to specify the nonlinear model, as well as provide initial estimates to the solver.

4. On the **Options** page of the dialog, select **Power** as the **Variance Structure Type**.
5. Click **OK**.

A summary of the fitted model appears in the **Report** window.

SURVIVAL

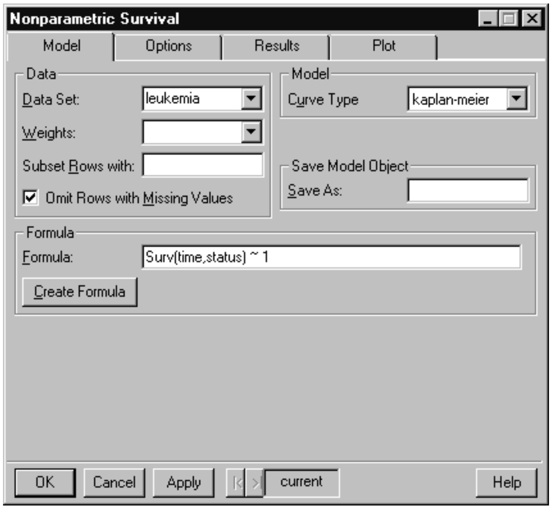
Survival analysis is used for data in which censoring is present.

Nonparametric Survival

Nonparametric survival curves are estimates of the probability of survival over time. They are used in situations such as medical trials where the response is time to failure, usually with some times lost to censoring. The most commonly used nonparametric survival curve is the Kaplan-Meier estimate. The **Nonparametric Survival** dialog fits a variety of nonparametric survival curves and allows the inclusion of grouping variables.

Fitting a nonparametric survival curve

From the main menu, choose **Statistics ► Survival ► Nonparametric Survival**. The **Nonparametric Survival** dialog opens, as shown in Figure 6.56.



Nonparametric Survival

Data

Data Set: leukemia

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Model

Curve Type: kaplan-meier

Save Model Object

Save As:

Formula

Formula: Surv(time,status) ~ 1

Figure 6.56: *The* ***Nonparametric Survival*** *dialog.*

Example

The `leukemia` data set contains data from a trial to evaluate efficacy of maintenance chemotherapy for acute myelogenous leukemia. We fit a Kaplan-Meier survival curve to the full set of data.

1. Open the **Nonparametric Survival** dialog.
2. Type `leukemia` in the **Data Set** field.
3. Enter the **Formula** `Surv(time,status)~1` or click on the **Create Formula** button to construct the formula. The `Surv` function creates a survival object, which is the appropriate response variable for a survival formula.

   To use the **Formula** builder, click the **Create Formula** button. In the dialog that appears, highlight the `time` variable and click the **Time 1** button. Highlight the `status` variable, click the **Censor Codes** button, and then click **Add Response**. This generates the formula

```
Surv(time, status, type="right") ~ 1
```

   By default, the censoring argument `type` is set to `"right"` when only one time variable is given. Thus, this formula is equivalent to `Surv(time,status)~1`.

4. Click **OK**.

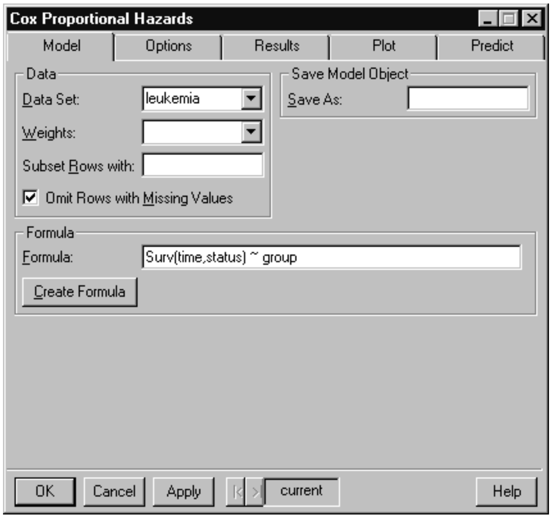
A summary of the fitted model appears in the **Report** window, and a plot of the survival curve with confidence intervals appears in a **Graph Sheet**.

Cox Proportional Hazards

The *Cox proportional hazards model* is the most commonly used regression model for survival data. It allows the estimation of nonparametric survival curves (such as Kaplan-Meier curves) in the presence of covariates. The effect of the covariates upon survival is usually of primary interest.

Fitting a Cox proportional hazards model

From the main menu, choose **Statistics ► Survival ► Cox Proportional Hazards**. The **Cox Proportional Hazards** dialog opens, as shown in Figure 6.57.



Data Set: leukemia

☑ Omit Rows with Missing Values

Formula: Surv(time,status) ~ group

Figure 6.57: *The **Cox Proportional Hazards** dialog.*

Example

We fit a Cox proportional hazards model to the `leukemia` data set with `group` used as a covariate.

1. Open the **Cox Proportional Hazards** dialog.
2. Type `leukemia` in the **Data Set** field.
3. Enter the **Formula** `Surv(time,status)~group` or click the **Create Formula** button to construct the formula. The `Surv` function creates a survival object, which is the appropriate response variable for a survival formula.

   To use the **Formula** builder, click the **Create Formula** button. In the dialog that appears, highlight the `time` variable and click the **Time 1** button. Highlight the `status` variable, click the **Censor Codes** button, and then click **Add Response**. Finally, highlight the `group` variable and click **Main Effect**. This generates the formula

```
Surv(time, status, type="right") ~ group
```

   By default, the censoring argument `type` is set to `"right"` when only one time variable is given. Thus, this formula is equivalent to `Surv(time,status)~group`.

4. Select the **Survival Curves** check box on the **Plot** page.
5. Click **OK**.

A summary of the fitted model appears in the **Report** window, and a plot of the survival curve with confidence intervals appears in a **Graph Sheet**.

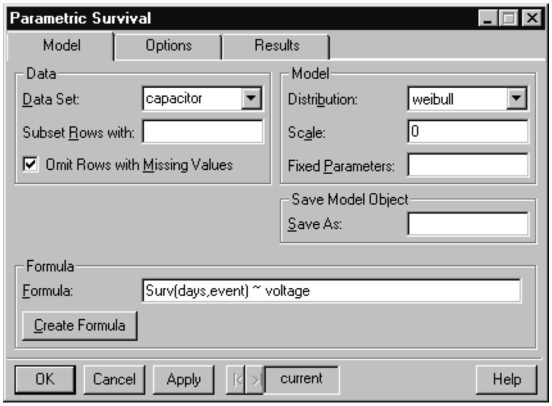
Parametric Survival

Parametric regression models for censored data are used in a variety of contexts ranging from manufacturing to studies of environmental contaminants. Because of their frequent use for modeling failure time or survival data, they are often referred to as *parametric survival models.* In this context, they are used throughout engineering to discover reasons why engineered products fail. They are called *accelerated failure time models* or *accelerated testing models* when the product is tested under more extreme conditions than normal to accelerate its failure time.

The **Parametric Survival** and **Life Testing** dialogs fit the same type of model. The difference between the two dialogs is in the options available. The **Life Testing** dialog supports threshold estimation, truncated distributions, and offsets. In addition, it provides a variety of diagnostic plots and the ability to obtain predicted values. This functionality is not available in the **Parametric Survival** dialog. In contrast, the **Parametric Survival** dialog supports frailty and penalized likelihood models, which is not available in the **Life Testing** dialog.

Fitting a parametric survival model

From the main menu, choose **Statistics ► Survival ► Parametric Survival**. The **Parametric Survival** dialog opens, as shown in Figure 6.58.



Data Set: capacitor
Subset Rows with:
☑ Omit Rows with Missing Values
Distribution: weibull
Scale: 0
Fixed Parameters:
Save As:
Formula: Surv(days,event) ~ voltage

Figure 6.58: *The **Parametric Survival** dialog.*

Example

The `capacitor` data set contains measurements from a simulated accelerated life testing of capacitors. It includes time to failure (`days`), indicator of failure or censoring (`event`), and the voltage at which the test was run (`voltage`). We use a parametric survival model to examine how voltage influences the probability of failure.

1. Open the **Parametric Survival** dialog.
2. Type `capacitor` in the **Data Set** field.
3. Enter the **Formula** `Surv(days,event)~voltage` or click the **Create Formula** button to construct the formula. The `Surv` function creates a survival object, which is the appropriate response variable for a survival formula.

   To use the **Formula** builder, click the **Create Formula** button. In the dialog that appears, highlight the `days` variable and click the **Time 1** button. Highlight the `event` variable, click the **Censor Codes** button, and then click **Add Response**. Finally, highlight the `voltage` variable and click **Main Effect**. This generates the formula

```
Surv(days, event, type="right") ~ voltage
```

By default, the censoring argument `type` is set to `"right"` when only one time variable is given. Thus, this formula is equivalent to `Surv(days,event)~voltage`.

4. Click **OK**.

A summary of the fitted model appears in the **Report** window.

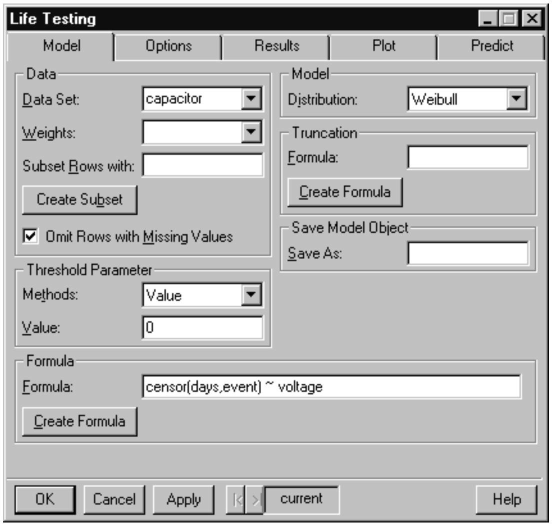
Life Testing

The **Life Testing** dialog fits a parametric regression model for censored data. These models are used in a variety of contexts ranging from manufacturing to studies of environmental contaminants. Because of their frequent use for modeling failure time or survival data, they are often referred to as *parametric survival models.* In this context, they are used throughout engineering to discover reasons why engineered products fail. They are called *accelerated failure time models* or *accelerated testing models* when the product is tested under more extreme conditions than normal to accelerate its failure time.

The **Parametric Survival** and **Life Testing** dialogs fit the same type of model. The difference between the two dialogs is in the options available. The **Life Testing** dialog supports threshold estimation, truncated distributions, and offsets. In addition, it provides a variety of diagnostic plots and the ability to obtain predicted values. This functionality is not available in the **Parametric Survival** dialog. In contrast, the **Parametric Survival** dialog supports frailty and penalized likelihood models, which is not available in the **Life Testing** dialog.

Performing life testing

From the main menu, choose **Statistics ▶ Survival ▶ Life Testing**. The **Life Testing** dialog opens, as shown in Figure 6.59.



Data Set: capacitor

☑ Omit Rows with Missing Values

Distribution: Weibull

Methods: Value

Value: 0

Formula: censor(days,event) ~ voltage

Figure 6.59: *The **Life Testing** dialog.*

Example

We use the **Life Testing** dialog to examine how voltage influences the probability of failure in the `capacitor` data set.

1. Open the **Life Testing** dialog.
2. Type `capacitor` in the **Data Set** field.
3. Enter the **Formula** `censor(days,event)~voltage` or click the **Create Formula** button to construct the formula. The `censor` function creates a survival object, which is the appropriate response variable for a survival formula. It is similar to the `Surv` function, but provides more options for specifying censor codes.

   To use the **Formula** builder, click the **Create Formula** button. In the dialog that appears, highlight the `days` variable and click the **Time 1** button. Highlight the `event` variable, click the **Censor Codes** button, and then click **Add Response**. Finally, highlight the `voltage` variable and click **Main Effect**. This generates the formula

   ```
   censor(days, event, type="right") ~ voltage
   ```

By default, the censoring argument `type` is set to `"right"` when only one time variable is given. Thus, this formula is equivalent to `censor(days,event)~voltage`.

4. Click **OK**.

A summary of the fitted model appears in the **Report** window.

TREE

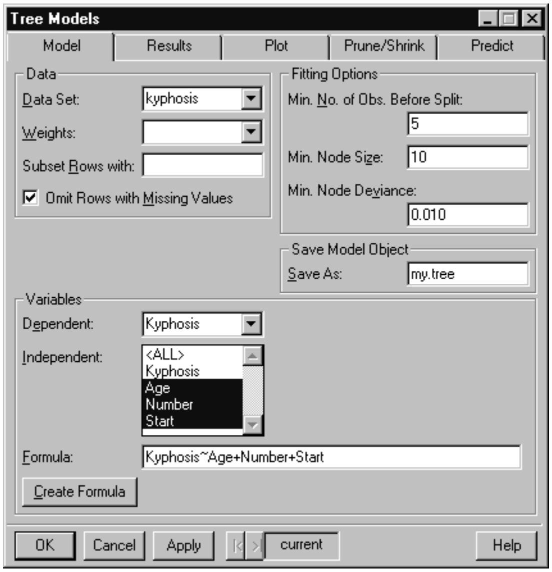
Tree-based models provide an alternative to linear and additive models for regression problems, and to linear and additive logistic models for classification problems. Tree models are fit by successively splitting the data to form homogeneous subsets. The result is a hierarchical tree of decision rules useful for prediction or classification.

Tree Models

The **Tree Models** dialog is used to fit a tree model.

Fitting a tree model

From the main menu, choose **Statistics** ▶ **Tree** ▶ **Tree Models**. The **Tree Models** dialog opens, as shown in Figure 6.60.



Data Set: kyphosis
Weights:
Subset Rows with:
☑ Omit Rows with Missing Values
Min. No. of Obs. Before Split: 5
Min. Node Size: 10
Min. Node Deviance: 0.010
Save As: my.tree
Dependent: Kyphosis
Independent: <ALL>, Kyphosis, Age, Number, Start
Formula: Kyphosis~Age+Number+Start

Figure 6.60: *The **Tree Models** dialog.*

Example

The `kyphosis` data set has 81 rows representing data on 81 children who have had corrective spinal surgery. The outcome `Kyphosis` is a binary variable, and the other three columns `Age`, `Number`, and `Start`, are numeric. Kyphosis is a post-operative deformity which is present in some children receiving spinal surgery. We are interested in examining whether the child's age, the number of vertebrae operated on, or the starting vertebra influence the likelihood of the child having a deformity.

We fit a classification tree to the data, in which a tree structure is used to classify individuals as likely or unlikely to have kyphosis based on their values of `Age`, `Number`, and `Start`. The resulting classification tree divides individuals into groups based on these variables.

1. Open the **Tree Models** dialog.
2. Type `kyphosis` in the **Data Set** field.
3. Specify `Kyphosis~Age+Number+Start` in the **Formula** field.
4. Type `my.tree` in the **Save As** field. A tree model object is saved under this name, which we explore in a later example using **Tree Tools**.
5. Click **OK**.

A summary of the model is printed in the **Report** window, and a tree plot is displayed in a **Graph Sheet**.

Tree Tools

Spotfire S+ provides a rich suite of tools for interactively examining a regression tree. To use **Tree Tools**, first use the **Tree Models** dialog to create a tree model. Save the tree model by specifying a name in the **Save As** field of the dialog.

All of the **Tree Tools** begin by creating a plot of the specified tree model. The **Browse**, **Burl**, **Histogram**, **Identify**, and **Snip** tools let you select splits or nodes on the plot, and provide information on the selection. Click the left mouse button to make a selection, and click the right or center mouse button to leave the selection mode. With these tools, it may be necessary to arrange your windows prior to clicking **OK** or **Apply** so that the necessary **Graph** and **Report** windows are in view while making selections.

The tools behave in the following manner:

- **Browse**: select a node on the tree plot. Summary information on the node appears in the **Report** window. Right-click to leave the selection mode. Specify a name in the **Save As** field to save a list of the node information.

- **Burl**: select a split on the tree plot. Plots appear under the tree that display the change in deviance for all candidate splits. The actual split has the largest change in deviance. These plots are useful for examining whether other splits would produce an improvement in fit similar to the improvement from the actual split. Right-click to leave the selection mode. Specify a name in the **Save As** field to save a list with information on the candidate splits.

- **Histogram**: specify variables for which to draw histograms in the **Hist Variables** field. Select a split on the tree plot. Plots appear under the tree that display histograms of the specified variables, with separate histograms for the values in the two nodes resulting from the split. Right-click to leave the selection mode. Specify a name in the **Save As** field to save a list of the variable values corresponding to the histograms.

- **Identify**: select a node on the tree plot. The row names or numbers for the observations in that node appear in the **Report** window. Right-click to leave the selection mode. Specify a name in the **Save As** field to save a list of the observations in each node.

- **Rug**: specify the variable to plot in the **Rug/Tile Variable** field. A high-density plot that shows the average value of the specified variable for observations in each leaf is plotted beneath the tree plot. Specify a name in the **Save As** field to save a vector of the average values. This tool is not interactive.

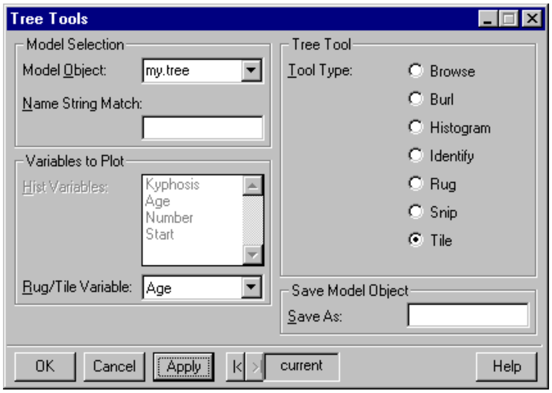
- **Snip**: use this tool to create a new tree with some splits removed. Select a node on the tree plot to print the total tree deviance and what the total tree deviance would be if the subtree rooted at the node were removed. Click a second time on the same node to snip that subtree off and visually erase the subtree. This process may be repeated any number of times. Right-click to leave the selection mode. Specify a name in the **Save As** field to save the snipped tree.

- **Tile**: specify a variable to plot in the **Rug/Tile Variable** field. A vertical bar plot of the variable is plotted beneath the tree plot. Factor variables have one bar per level, and numeric variables are quantized into four equi-sized ordered levels.

Specify a name in the **Save As** field to save a matrix of frequency counts for the observations in each leaf. This tool is not interactive.

Using the tree tools

From the main menu, choose **Statistics** ▶ **Tree** ▶ **Tree Tools**. The **Tree Tools** dialog opens, as shown in Figure 6.61.



Tree Tools

Model Selection

Model Object: my.tree

Name String Match:

Variables to Plot

Hist Variables: Kyphosis, Age, Number, Start

Rug/Tile Variable: Age

Tree Tool

Tool Type: ○ Browse ○ Burl ○ Histogram ○ Identify ○ Rug ○ Snip ● Tile

Save Model Object

Save As:

Figure 6.61: *The **Tree Tools** dialog.*

Example

In Tree Models on page 322, we fit a classification tree to the `kyphosis` data. We can use a tree tile plot to see histograms of `Age` within each group.

1. If you have not done so already, fit the classification tree and save the results in an object named `my.tree`. This process is outlined on page 322.
2. Open the **Tree Tools** dialog.
3. Select `my.tree` as the **Model Object**.
4. Select **Tile** as the **Tool Type**.
5. Select `Age` as the **Rug/Tile Variable**.
6. Click **OK**.

A tree tile plot is displayed in a **Graph Sheet**. The top portion of the graph contains a plot of the tree. The bottom portion contains histograms of `Age` for each terminal node in the tree.

COMPARE MODELS

In regression and ANOVA, the data analyst often has a variety of candidate models of interest. From these models, the data analyst usually chooses one which is thought to best describe the relationship between the predictors and the response.

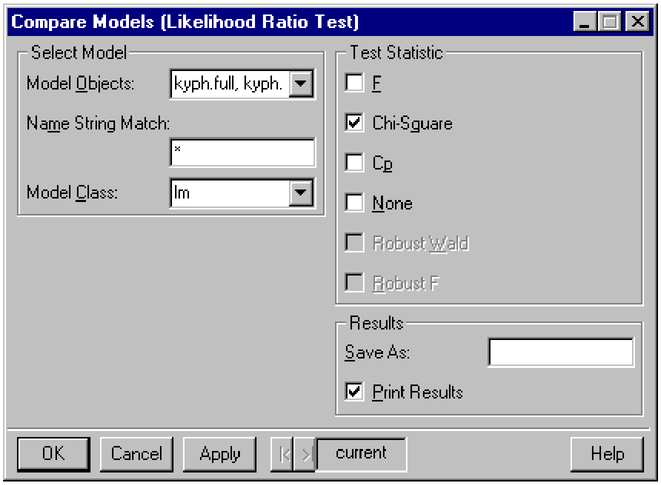
Model selection typically involves making a trade-off between complexity and goodness-of-fit. A more complex model (one involving more variables or interactions of variables) is guaranteed to fit the observed data more closely than a simpler model. For example, a model with as many parameters as observations would fit the data perfectly. However, as the model grows more complex, it begins to reflect the random variation in the sample obtained rather than a more general relationship between the response and the predictors. This may make the model less useful than a simpler one for predicting new values or drawing conclusions regarding model structure.

The general strategy in regression is to choose a simpler model when doing so does not reduce the goodness-of-fit by a significant amount. In linear regression and ANOVA, an F test may be used to compare two models. In logistic and log-linear regression, a chi-square test comparing deviances is appropriate.

The **Compare Models** dialog lets you compare the goodness-of-fit of two or more models. Typically, the models should be *nested*, in that the simpler model is a special case of the more complex model. Before using the **Compare Models** dialog, first save the models of interest as objects.

Comparing models

From the main menu, choose **Statistics ► Compare Models**. The **Compare Models** (**Likelihood Ratio Test**) dialog opens, as shown in Figure 6.62.



Compare Models (Likelihood Ratio Test)

Select Model

Model Objects: kyph.full, kyph.

Name String Match: *

Model Class: lm

Test Statistic

□ F
☑ Chi-Square
□ Cp
□ None
□ Robust Wald
□ Robust F

Results

Save As:

☑ Print Results

Figure 6.62: *The **Compare Models (Likelihood Ratio Test)** dialog.*

Example

In the kyphosis analysis of Logistic Regression on page 295, we suggested that `Start` had a significant effect upon `Kyphosis`, but `Age` and `Number` did not. We can use a chi-square test to determine whether a model with just `Start` is sufficient.

1. Open the **Logistic Regression** dialog.
2. Type `kyphosis` in the **Data Set** field.
3. Specify `Kyphosis~Age+Number+Start` in the **Formula** field. Type `kyph.full` in the **Save As** field and click **Apply**. Information describing this model is saved as an object named `kyph.full`.
4. Change the **Formula** field to `Kyphosis~Start`. Change the **Save As** name to `kyph.sub`, and click **OK**. Information describing this model is saved as an object named `kyph.sub`.
5. Open the **Compare Models** (**Likelihood Ratio Test**) dialog.
6. CTRL-click to select `kyph.full` and `kyph.sub` in the **Model Objects** list.
7. Select **Chi-Square** as the **Test Statistic**.

8. Click **OK**.

The analysis of deviance table below appears in the **Report** window. The table displays the degrees of freedom and residual deviance for each model. Under the null hypothesis that the simpler model is appropriate, the difference in residual deviances is distributed as a chi-squared statistic. The `Pr(Chi)` column provides a *p* value for the hypothesis that the simpler model is appropriate. If this value is less than a specific value, typically 0.05, then the more complex model causes a large enough change in deviance to warrant the inclusion of the additional terms. That is, the extra complexity is justified by an improvement in goodness-of-fit.

In our example the *p* value of 0.035 suggests that `Age` and/or `Number` add extra information useful for predicting the outcome.

```
Analysis of Deviance Table

Response: Kyphosis

                 Terms Resid. Df Resid. Dev        Test
1 Age + Number + Start        77   61.37993
2                Start        79   68.07218 -Age-Number
  Df  Deviance    Pr(Chi)
1
2 -2 -6.692253 0.03522052
```

CLUSTER ANALYSIS

In cluster analysis, we search for groups (clusters) in the data in such a way that objects belonging to the same cluster resemble each other, whereas objects in different clusters are dissimilar.

Compute Dissimilarities

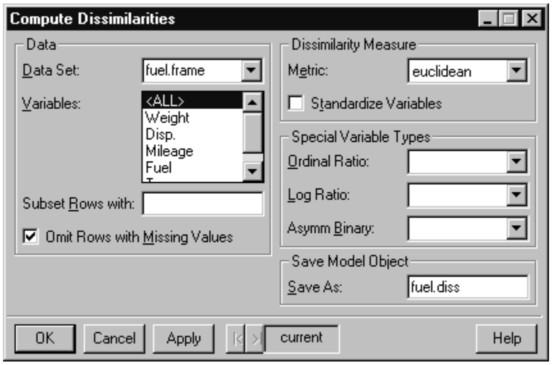
A data set for clustering can consist of either rows of observations, or a dissimilarity object storing measures of dissimilarities between observations. K-means, partitioning around medoids, and monothetic clustering are all algorithms that operate on a data set. Partitioning around medoids, fuzzy clustering, and the hierarchical methods take either a data set or a dissimilarity object.

The clustering routines themselves do not accept nonnumeric variables. If a data set contains nonnumeric variables such as factors, they must either be converted to numeric variables, or dissimilarities must be used.

How we compute the dissimilarity between two objects depends on the data type of the original variables. By default, numeric columns are treated as interval-scaled variables, factors are treated as nominal variables, and ordered factors are treated as ordinal variables. Other variable types should be specified as such through the fields in the **Special Variable Types** group.

Calculating dissimilarities

From the main menu, choose **Statistics ► Cluster Analysis ► Compute Dissimilarities**. The **Compute Dissimilarities** dialog opens, as shown in Figure 6.63.



Compute Dissimilarities

Data

Data Set: fuel.frame

Variables: <ALL>, Weight, Disp., Mileage, Fuel

Subset Rows with:

☑ Omit Rows with Missing Values

Dissimilarity Measure

Metric: euclidean

□ Standardize Variables

Special Variable Types

Ordinal Ratio:

Log Ratio:

Asymm Binary:

Save Model Object

Save As: fuel.diss

Figure 6.63: *The* ***Compute Dissimilarities*** *dialog.*

Example

The data set `fuel.frame` is taken from the April 1990 issue of *Consumer Reports*. It contains 60 observations (rows) and 5 variables (columns). Observations of weight, engine displacement, mileage, type, and fuel were taken for each of sixty cars. In the `fuel.frame` data, we calculate dissimilarities as follows:

1. Open the **Compute Dissimilarities** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type `fuel.diss` in the **Save As** field.
4. Click **OK**.

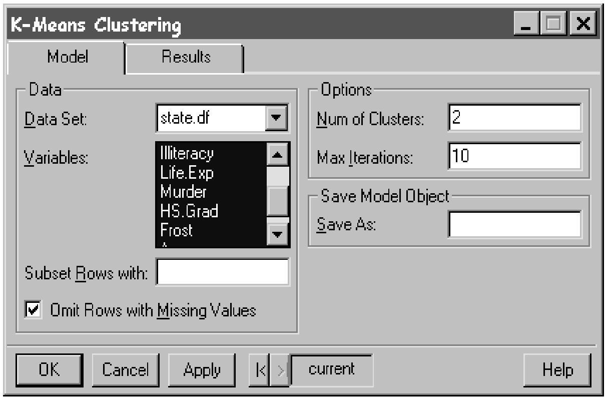
The dissimilarities are calculated and saved in the object `fuel.diss`. We use this object in later examples of clustering dialogs.

K-Means Clustering

One of the most well-known partitioning methods is *k-means*. In the k-means algorithm, observations are classified as belonging to one of k groups. Group membership is determined by calculating the centroid for each group (the multidimensional version of the mean) and assigning each observation to the group with the closest centroid.

Performing k-means clustering

From the main menu, choose **Statistics ▶ Cluster Analysis ▶ K-Means**. The **K-Means Clustering** dialog opens, as shown in Figure 6.64.



Data Set: state.df

Variables: Illiteracy, Life.Exp, Murder, HS.Grad, Frost

Subset Rows with:

☑ Omit Rows with Missing Values

Num of Clusters: 2

Max Iterations: 10

Save As:

Figure 6.64: *The* ***K-Means Clustering*** *dialog.*

Example

We cluster the information in the `state.df` data set. These data describe various characteristics of the 50 states, including population, income, illiteracy, life expectancy, and education.

1. Choose **File ▶ Load Library** to load the `example5` library. Highlight `example5` in the **Library Name** list and click **OK**. This library contains a few example data sets that are not in the main Spotfire S+ databases, including `state.df`.
2. Open the **K-Means Clustering** dialog.
3. Type `state.df` in the **Data Set** field.
4. CTRL-click to select the **Variables** `Population` through `Area`.
5. Click **OK**.

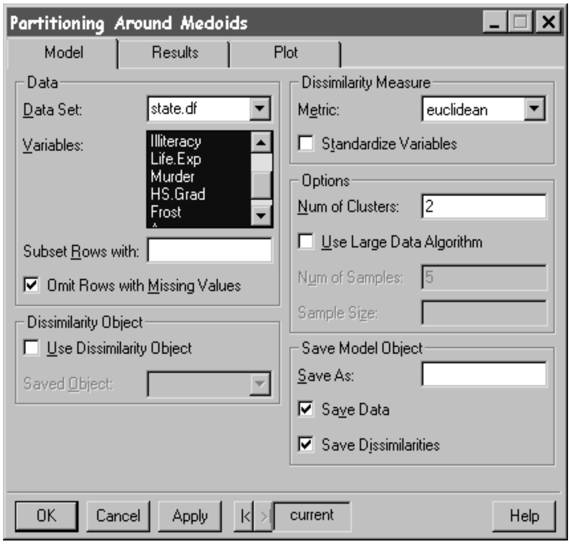
A summary of the clustering appears in the **Report** window.

Partitioning Around Medoids

The *partitioning around medoids* algorithm is similar to k-means, but it uses medoids rather than centroids. Partitioning around medoids has the following advantages: it accepts a dissimilarity matrix; it is more robust because it minimizes a sum of dissimilarities instead of a sum of squared Euclidean distances; and it provides novel graphical displays (silhouette plots and clusplots).

Performing partitioning around medoids

From the main menu, choose **Statistics ► Cluster Analysis ► Partitioning Around Medoids**. The **Partitioning Around Medoids** dialog opens, as shown in Figure 6.65.



Data Set: state.df

Variables: Illiteracy, Life.Exp, Murder, HS.Grad, Frost

Subset Rows with:

☑ Omit Rows with Missing Values

□ Use Dissimilarity Object

Saved Object:

Metric: euclidean

□ Standardize Variables

Num of Clusters: 2

□ Use Large Data Algorithm

Num of Samples: 5

Sample Size:

Save As:

☑ Save Data

☑ Save Dissimilarities

Figure 6.65: *The* ***Partitioning Around Medoids*** *dialog.*

Example 1

In K-Means Clustering on page 330, we clustered the information in the `state.df` data set using the k-means algorithm. In this example, we use the partitioning around medoids algorithm.

1. If you have not done so already, choose **File ► Load Library** to load the `example5` library. This library contains a few example data sets that are not in the main Spotfire S+ databases, including `state.df`.
2. Open the **Partitioning Around Medoids** dialog.
3. Type `state.df` in the **Data Set** field.
4. CTRL-click to select the **Variables** `Population` through `Area`.

5. Click **OK**.

A summary of the clustering appears in the **Report** window.

Example 2

In Compute Dissimilarities on page 329, we calculated dissimilarities for the `fuel.frame` data set. In this example, we cluster the `fuel.frame` dissimilarities using the partitioning around medoids algorithm.

1. If you have not already done so, create the object `fuel.diss` from the instructions on page 330.
2. Open the **Partitioning Around Medoids** dialog.
3. Select the **Use Dissimilarity Object** check box.
4. Select `fuel.diss` as the **Saved Object**.
5. Click **OK**.

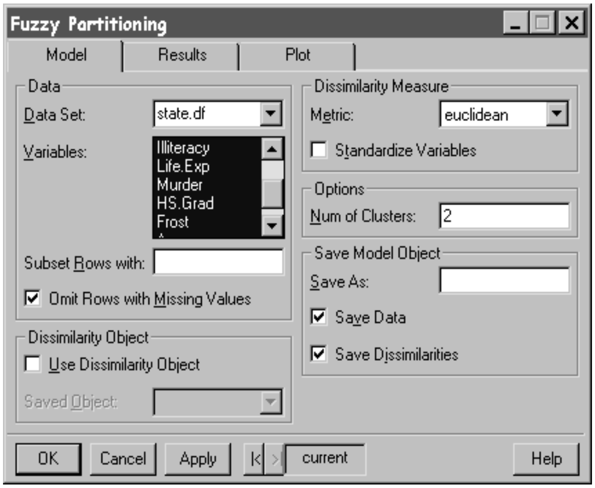
A summary of the clustering appears in the **Report** window.

Fuzzy Partitioning

Most clustering algorithms are crisp clustering methods. This means that each object of the data set is assigned to exactly one cluster. For instance, an object lying between two clusters must be assigned to one of them. In *fuzzy clustering*, each observation is given fractional membership in multiple clusters.

Performing fuzzy partitioning

From the main menu, choose **Statistics ► Cluster Analysis ► Fuzzy Partitioning**. The **Fuzzy Partitioning** dialog opens, as shown in Figure 6.66.



Data Set: state.df

Variables: Illiteracy, Life.Exp, Murder, HS.Grad, Frost

☑ Omit Rows with Missing Values

☐ Use Dissimilarity Object

Metric: euclidean

☐ Standardize Variables

Num of Clusters: 2

☑ Save Data

☑ Save Dissimilarities

Figure 6.66: *The **Fuzzy Partitioning** dialog.*

Example 1

In K-Means Clustering on page 330, we clustered the information in the `state.df` data set using the k-means algorithm. In this example, we use fuzzy partitioning.

1. If you have not done so already, choose **File ▶ Load Library** to load the `example5` library. This library contains a few example data sets that are not in the main Spotfire S+ databases, including `state.df`.
2. Open the **Fuzzy Partitioning** dialog.
3. Type `state.df` in the **Data Set** field.
4. CTRL-click to select the **Variables** `Population` through `Area`.
5. Click **OK**.

A summary of the clustering appears in the **Report** window.

Example 2

In Compute Dissimilarities on page 329, we calculated dissimilarities for the `fuel.frame` data set. In this example, we cluster the `fuel.frame` dissimilarities using fuzzy partitioning.

1. If you have not already done so, create the object `fuel.diss` from the instructions on page 330.

2. Open the **Fuzzy Partitioning** dialog.
3. Select the **Use Dissimilarity Object** check box.
4. Select `fuel.diss` as the **Saved Object**.
5. Click **OK**.

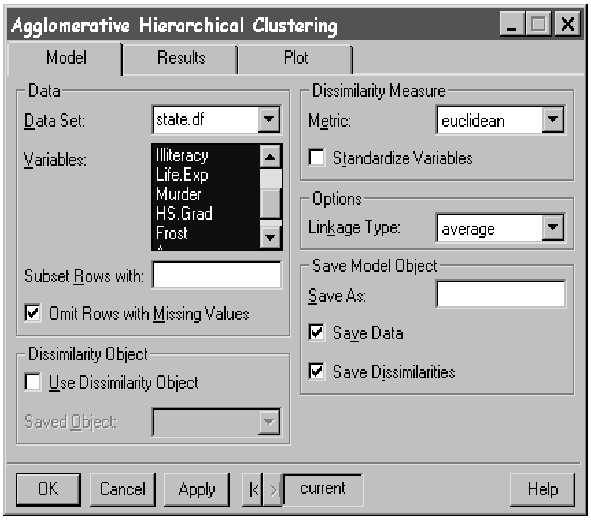
A summary of the clustering appears in the **Report** window.

Agglomerative Hierarchical Clustering

Hierarchical algorithms proceed by combining or dividing existing groups, producing a hierarchical structure that displays the order in which groups are merged or divided. *Agglomerative* methods start with each observation in a separate group, and proceed until all observations are in a single group.

Performing agglomerative hierarchical clustering

From the main menu, choose **Statistics ▶ Cluster Analysis ▶ Agglomerative Hierarchical**. The **Agglomerative Hierarchical Clustering** dialog opens, as shown in Figure 6.67.



Data
Data Set: state.df
Variables: Illiteracy, Life.Exp, Murder, HS.Grad, Frost
Subset Rows with:
☑ Omit Rows with Missing Values

Dissimilarity Object
☐ Use Dissimilarity Object
Saved Object:

Dissimilarity Measure
Metric: euclidean
☐ Standardize Variables

Options
Linkage Type: average

Save Model Object
Save As:
☑ Save Data
☑ Save Dissimilarities

Figure 6.67: *The **Agglomerative Hierarchical Clustering** dialog.*

Example 1

In K-Means Clustering on page 330, we clustered the information in the `state.df` data set using the k-means algorithm. In this example, we use an agglomerative hierarchical method.

1. If you have not done so already, choose **File ▶ Load Library** to load the `example5` library. This library contains a few example data sets that are not in the main Spotfire S+ databases, including `state.df`.
2. Open the **Agglomerative Hierarchical Clustering** dialog.
3. Type `state.df` in the **Data Set** field.
4. CTRL-click to select the **Variables** `Population` through `Area`.
5. Click **OK**.

A summary of the clustering appears in the **Report** window.

Example 2

In Compute Dissimilarities on page 329, we calculated dissimilarities for the `fuel.frame` data set. In this example, we cluster the `fuel.frame` dissimilarities using the agglomerative hierarchical algorithm.

1. If you have not already done so, create the object `fuel.diss` from the instructions on page 330.
2. Open the **Agglomerative Hierarchical Clustering** dialog.
3. Select the **Use Dissimilarity Object** check box.
4. Select `fuel.diss` as the **Saved Object**.
5. Click **OK**.

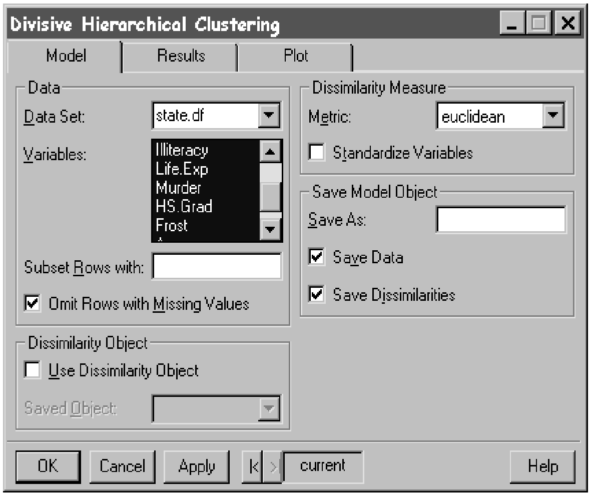
A summary of the clustering appears in the **Report** window.

Divisive Hierarchical Clustering

Hierarchical algorithms proceed by combining or dividing existing groups, producing a hierarchical structure that displays the order in which groups are merged or divided. *Divisive* methods start with all observations in a single group and proceed until each observation is in a separate group.

Performing divisive hierarchical clustering

From the main menu, choose **Statistics ▶ Cluster Analysis ▶ Divisive Hierarchical**. The **Divisive Hierarchical Clustering** dialog opens, as shown in Figure 6.68.



Data Set: state.df

Variables: Illiteracy, Life.Exp, Murder, HS.Grad, Frost

Subset Rows with:

☑ Omit Rows with Missing Values

☐ Use Dissimilarity Object

Saved Object:

Metric: euclidean

☐ Standardize Variables

Save As:

☑ Save Data

☑ Save Dissimilarities

Figure 6.68: *The* ***Divisive Hierarchical Clustering*** *dialog.*

Example 1

In K-Means Clustering on page 330, we clustered the information in the `state.df` data set using the k-means algorithm. In this example, we use a divisive hierarchical method.

1. If you have not done so already, choose **File ▶ Load Library** to load the `example5` library. This library contains a few example data sets that are not in the main Spotfire S+ databases, including `state.df`.
2. Open the **Divisive Hierarchical Clustering** dialog.
3. Type `state.df` in the **Data Set** field.
4. CTRL-click to select the **Variables** `Population` through `Area`.
5. Click **OK**.

A summary of the clustering appears in the **Report** window.

Example 2

In Compute Dissimilarities on page 329, we calculated dissimilarities for the `fuel.frame` data set. In this example, we cluster the `fuel.frame` dissimilarities using the divisive hierarchical algorithm.

1. If you have not already done so, create the object `fuel.diss` from the instructions on page 330.
2. Open the **Divisive Hierarchical Clustering** dialog.
3. Select the **Use Dissimilarity Object** check box.
4. Select `fuel.diss` as the **Saved Object**.
5. Click **OK**.

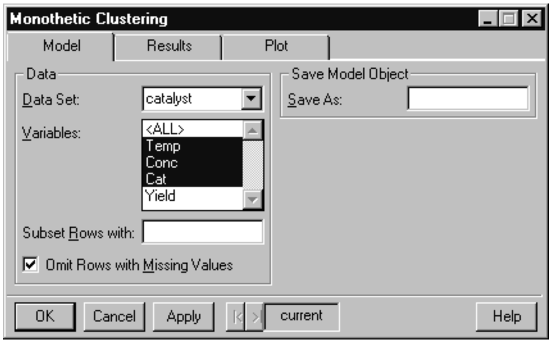
A summary of the clustering appears in the **Report** window.

Monothetic Clustering

When all of the variables in a data set are binary, a natural way to divide the observations is by splitting the data into two groups based on the two values of a particular binary variable. *Monothetic analysis* produces a hierarchy of clusters in which a group is split in two at each step, based on the value of one of the binary variables.

Performing monothetic clustering

From the main menu, choose **Statistics ► Cluster Analysis ► Monothetic (Binary Variables)**. The **Monothetic Clustering** dialog opens, as shown in Figure 6.69.



Data Set: catalyst

Variables: <ALL>, Temp, Conc, Cat, Yield

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Figure 6.69: *The **Monothetic Clustering** dialog.*

Example

The `catalyst` data set comes from a designed experiment. Its eight rows represent all possible combinations of two temperatures (`Temp`), two concentrations (`Conc`), and two catalysts (`Cat`). The fourth column represents the response variable `Yield`. We are interested in determining how temperature, concentration, and catalyst affect the `Yield`. Before fitting a model to these data, we can group observations according to the three binary predictors by using monothetic clustering.

1. Open the **Monothetic Clustering** dialog.
2. Type `catalyst` in the Data Set field.
3. CTRL-click to highlight the **Variables** `Temp`, `Conc`, and `Cat`.
4. Click OK.

A summary of the monothetic clustering appears in the **Report** window.

MULTIVARIATE

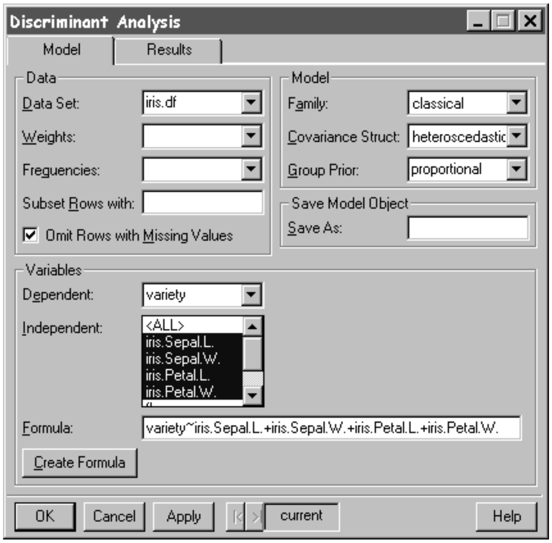
Multivariate techniques summarize the structure of multivariate data based on certain classical models.

Discriminant Analysis

The **Discriminant Analysis** dialog lets you fit a linear or quadratic discriminant function to a set of feature data.

Performing discriminant analysis

From the main menu, choose **Statistics ► Multivariate ► Discriminant Analysis**. The **Discriminant Analysis** dialog opens, as shown in Figure 6.70.



Discriminant Analysis

Data

Data Set: iris.df

Weights:

Frequencies:

Subset Rows with:

☑ Omit Rows with Missing Values

Model

Family: classical

Covariance Struct: heteroscedastic

Group Prior: proportional

Save Model Object

Save As:

Variables

Dependent: variety

Independent: <ALL> iris.Sepal.L. iris.Sepal.W. iris.Petal.L. iris.Petal.W.

Formula: variety~iris.Sepal.L.+iris.Sepal.W.+iris.Petal.L.+iris.Petal.W.

Figure 6.70: *The* ***Discriminant Analysis*** *dialog.*

Example

We perform a discriminant analysis on Fisher's `iris` data. This data set is a three-dimensional array giving 4 measurements on 50 flowers from each of 3 varieties of iris. The measurements are in centimeters and include sepal length, sepal width, petal length, and petal width.

The iris species are Setosa, Versicolor, and Virginica. The built-in data frame `iris.df`, located in the `example5` library, is a two-dimensional version of `iris`.

1. Choose **File ▶ Load Library** to load the `example5` library. Highlight `example5` in the **Library Name** list and click **OK**. This library contains a few example data sets that are not in the main Spotfire S+ databases.
2. Open the **Discriminant Analysis** dialog.
3. Type `iris.df` in the **Data Set** field.
4. Choose `variety` as the **Dependent** variable.
5. CTRL-click to select `iris.Sepal.L.`, `iris.Sepal.W.`, `iris.Petal.L.`, and `iris.Petal.W.` as the **Independent** variables.
6. Choose **heteroscedastic** as the **Covariance Struct**.
7. Click **OK**.

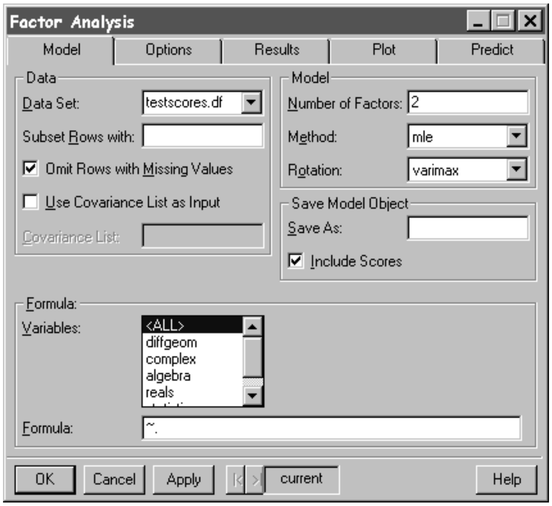
A summary of the fitted model appears in the **Report** window.

Factor Analysis

In many scientific fields, notably psychology and other social sciences, you are often interested in quantities like intelligence or social status, which are not directly measurable. However, it is often possible to measure other quantities that reflect the underlying variable of interest. *Factor analysis* is an attempt to explain the correlations between observable variables in terms of underlying factors, which are themselves not directly observable. For example, measurable quantities, such as performance on a series of tests, can be explained in terms of an underlying factor, such as intelligence.

Performing factor analysis

From the main menu, choose **Statistics ▶ Multivariate ▶ Factor Analysis**. The **Factor Analysis** dialog opens, as shown in Figure 6.71.



Data

Data Set: testscores.df

Subset Rows with:

☑ Omit Rows with Missing Values

☐ Use Covariance List as Input

Covariance List:

Model

Number of Factors: 2

Method: mle

Rotation: varimax

Save Model Object

Save As:

☑ Include Scores

Formula:

Variables: <ALL> diffgeom complex algebra reals

Formula: ~.

Figure 6.71: *The **Factor Analysis** dialog.*

Example

The data set `testscores.df`, located in the `example5` library, contains five test scores for each of twenty-five students. We use factor analysis to look for structure in the scores.

1. If you have not done so already, choose **File ▶ Load Library** to load the `example5` library. This library contains a few example data sets that are not in the main Spotfire S+ databases.
2. Open the **Factor Analysis** dialog.
3. Type `testscores.df` in the **Data Set** field.
4. Specify that we want **2** factors in the **Number of Factors** field.
5. Select **<ALL>** in the **Variables** field.
6. Click **OK**.

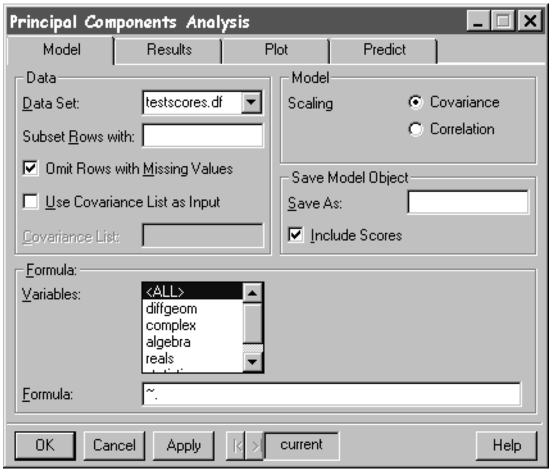
A summary of the factor analysis appears in the **Report** window.

Principal Components

For investigations involving a large number of observed variables, it is often useful to simplify the analysis by considering a smaller number of linear combinations of the original variables. For example, scholastic achievement tests typically consist of a number of examinations in different subject areas. In attempting to rate students applying for admission, college administrators frequently reduce the scores from all subject areas to a single, overall score. *Principal components* is a standard technique for finding optimal linear combinations of the variables.

Performing principal components

From the main menu, choose **Statistics** ▶ **Multivariate** ▶ **Principal Components**. The **Principal Components Analysis** dialog opens, as shown in Figure 6.72.



Data Set: testscores.df

Subset Rows with:

☑ Omit Rows with Missing Values

☐ Use Covariance List as Input

Covariance List:

Scaling ● Covariance ○ Correlation

Save As:

☑ Include Scores

Variables: <ALL> diffgeom complex algebra reals

Formula: ~.

current

Figure 6.72: *The* ***Principal Components Analysis*** *dialog.*

Example

In Factor Analysis on page 341, we performed a factor analysis for the `testscores.df` data set. In this example, we perform a principal components analysis for these data.

1. If you have not done so already, choose **File** ▶ **Load Library** to load the `example5` library. This library contains a few example data sets that are not in the main Spotfire S+ databases, including `testscores.df`.
2. Open the **Principal Components** dialog.
3. Type `testscores.df` in the **Data Set** field.
4. Select **<ALL>** in the **Variables** field.

5. Click on the **Plot** tab and check the **Screeplot** box.
6. Click **OK**.

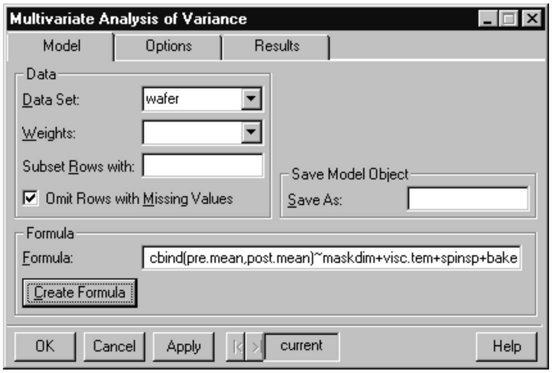
A summary of the principal components analysis appears in the **Report** window, and a bar plot of eigenvalues for each principal component is displayed in a **Graph Sheet**.

MANOVA

Multivariate analysis of variance, known as MANOVA, is the extension of analysis of variance techniques to multiple responses. The responses for an observation are considered as one multivariate observation, rather than as a collection of univariate responses. If the responses are independent, then it is sensible to just perform univariate analyses. However, if the responses are correlated, then MANOVA can be more informative than the univariate analyses, as well as less repetitive.

Performing MANOVA

From the main menu, choose **Statistics ► Multivariate ► MANOVA**. The **Multivariate Analysis of Variance** dialog opens, as shown in Figure 6.73.



Data Set: wafer

Weights:

Subset Rows with:

☑ Omit Rows with Missing Values

Save As:

Formula: cbind(pre.mean,post.mean)~maskdim+visc.tem+spinsp+bake

Figure 6.73: *The* ***Multivariate Analysis of Variance*** *dialog.*

Example

The data set `wafer` has eighteen rows and thirteen columns, of which eight contain factors, four contain responses, and one is the auxiliary variable N. It is a design object based on an orthogonal-array design for an experiment in which two integrated circuit wafers were made for each combination of factors. On each wafer, the pre- and postetch line widths were measured five times. The response variables are the mean and deviance of the measurements. As three of the wafers were broken, the auxiliary variable N gives the number of measurements actually made.

We are interested in treating the `pre.mean` and `post.mean` variables as a multivariate response, using MANOVA to explore the effect of each factor upon the response.

1. Open the **Multivariate Analysis of Variance** dialog.
2. Type `wafer` in the **Data Set** field.
3. Click the **Create Formula** button to open the **Formula** builder.
4. While holding down the CTRL key, select `pre.mean` and `post.mean` in the **Variables** list. Click the **Response** button to add these variables to the **Formula** as the response.
5. Select `maskdim`. Scroll through the **Variables** list until `etchtime` appears. Hold down SHIFT and select `etchtime`. This selects all columns between `maskdim` and `etchtime`. Click the **Main Effect** button to add these variables to the **Formula** as predictors.
6. Click **OK** to dismiss the **Formula** builder. The **Formula** field of the **MANOVA** dialog contains the formula you constructed.
7. Click **OK**.

A summary of the MANOVA appears in the **Report** window.

QUALITY CONTROL CHARTS

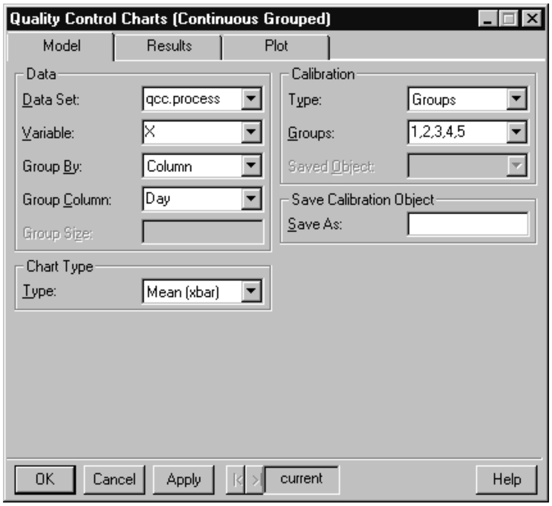
Quality control charts are useful for monitoring process data. *Continuous grouped* quality control charts monitor whether a process is staying within control limits. *Continuous ungrouped* charts are appropriate when variation is determined using sequential variation rather than group variation. It is also possible to create quality control charts for *counts* (the number of defective samples) and *proportions* (proportion of defective samples).

Continuous Grouped

The **Quality Control Charts** (**Continuous Grouped**) dialog creates quality control charts of means (xbar), standard deviations (s), and ranges (r).

Creating quality control charts (continuous grouped)

From the main menu, choose **Statistics** ► **Quality Control Charts** ► **Continuous Grouped**. The **Quality Control Charts** (**Continuous Grouped**) dialog opens, as shown in Figure 6.74.



Quality Control Charts (Continuous Grouped)

Data
- Data Set: qcc.process
- Variable: X
- Group By: Column
- Group Column: Day
- Group Size:

Chart Type
- Type: Mean (xbar)

Calibration
- Type: Groups
- Groups: 1,2,3,4,5
- Saved Object:

Save Calibration Object
- Save As:

Figure 6.74: *The **Quality Control Charts (Continuous Grouped)** dialog.*

Example

In Kolmogorov-Smirnov Goodness-of-Fit on page 219, we created a data set called `qcc.process` that contains a simulated process with 200 measurements. Ten measurements per day were taken for a total of twenty days. In this example, we create an xbar Shewhart chart to monitor whether the process is staying within control limits. The first five days of observations are treated as calibration data for use in setting the control limits.

1. If you have not done so already, create the `qcc.process` data set with the instructions given on page 220.
2. Open the **Quality Control Charts** (**Continuous Grouped**) dialog.
3. Type `qcc.process` in the **Data Set** field.
4. Select `X` as the **Variable**.
5. Select `Day` as the **Group Column**.
6. Select **Groups** as the **Calibration Type**.
7. CTRL-click to select **1**, **2**, **3**, **4**, **5** from the **Groups** list box.
8. Click **OK**.

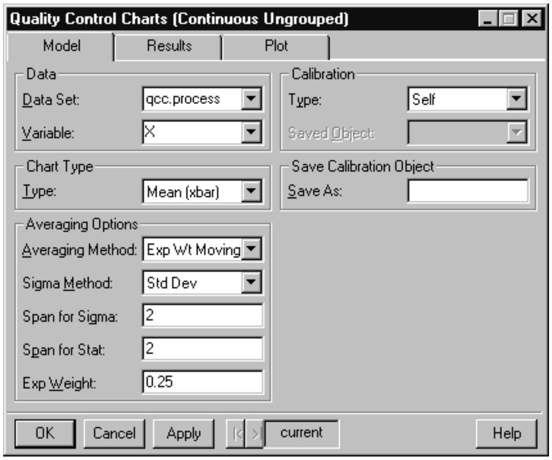
A Shewhart chart of the `X` data grouped by `Day` appears in a **Graph Sheet**.

Continuous Ungrouped

The **Quality Control Charts** (**Continuous Ungrouped**) dialog creates quality control charts of exponentially weighted moving averages (ewma), moving averages (ma), moving standard deviations (ms), and moving ranges (mr). These charts are appropriate when variation is determined using sequential variation rather than group variation.

Creating quality control charts (continuous ungrouped)

From the main menu, choose **Statistics ▶ Quality Control Charts ▶ Continuous Ungrouped**. The **Quality Control Charts** (**Continuous Ungrouped**) dialog opens, as shown in Figure 6.75.



Data Set: qcc.process

Variable: X

Type: Self

Saved Object:

Type: Mean (xbar)

Save As:

Averaging Method: Exp Wt Moving

Sigma Method: Std Dev

Span for Sigma: 2

Span for Stat: 2

Exp Weight: 0.25

Figure 6.75: *The* ***Quality Control Charts (Continuous Ungrouped)*** *dialog.*

Example

For this example, we ignore the fact that `qcc.process` contains grouped data, and instead pretend that the 200 observations are taken at sequential time points. We create an exponentially weighted moving average Shewhart chart to monitor whether the process is staying within control limits.

1. If you have not done so already, create the `qcc.process` data set with the instructions given on page 220.
2. Open the **Quality Control Charts** (**Continuous Ungrouped**) dialog.
3. Type `qcc.process` in the **Data Set** field.
4. Select `X` as the **Variable**.
5. Click **OK**.

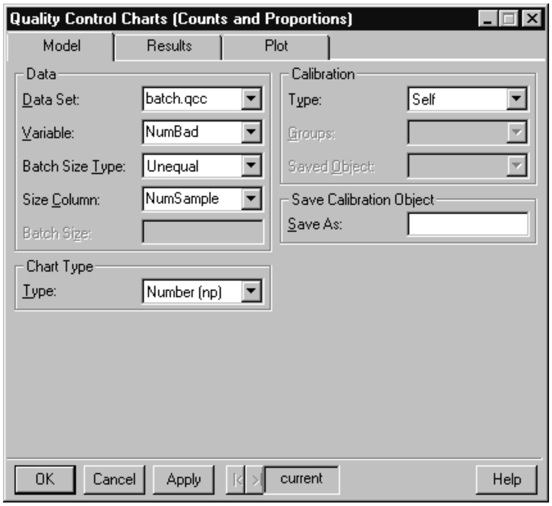
A Shewhart chart appears in a **Graph Sheet**.

Counts and Proportions

The **Quality Control Charts** (**Counts and Proportions**) dialog creates quality control charts for counts (number of defective samples) and proportions (proportion of defective samples).

Creating quality control charts (counts and proportions)

From the main menu, choose **Statistics ▶ Quality Control Charts ▶ Counts and Proportions**. The **Quality Control Charts** (**Counts and Proportions**) dialog opens, as shown in Figure 6.76.



Quality Control Charts (Counts and Proportions)

Data

Data Set: batch.qcc

Variable: NumBad

Batch Size Type: Unequal

Size Column: NumSample

Batch Size:

Chart Type

Type: Number (np)

Calibration

Type: Self

Groups:

Saved Object:

Save Calibration Object

Save As:

Figure 6.76: *The **Quality Control Charts (Counts and Proportions)** dialog.*

Example

We create a Spotfire S+ data set, `batch.qcc`, that contains simulated data representing the number of defective items in daily batches over 40 days. For the first 10 days the batches were of size 20, but for the remaining 30 days batches of 35 were taken.

1. Open an empty data set by clicking the **New Data Set** button on the **Standard** toolbar.
2. Enter the following forty numbers in the first column:

```
3   2   7   4   5   4   4   8   3   4
6   6   6   9  18   9   7  11  11   9
10  10  14   5  15  11  14  15  11  10
14   8  11  13  16  14  19  13  15  23
```

3. The first column represents the number of defective items in the daily samples. Change the column name by double-clicking on `V1` and typing in `NumBad`. Press ENTER or click elsewhere in the **Data** window to accept the change.

4. Select **Data ▶ Transform** from the main menu. Verify that the name of the data set appears in the **Data Set** field, and type `NumSample` in the **Target Column** field. Type the command `c(rep(20,10), rep(35,30))` in the **Expression** field and click **OK**. This step creates a column named `NumSample` containing 10 copies of the integer 20, followed by 30 copies of the integer 35. The `NumSample` column represents the batch size of the simulated observations.
5. Rename the data set by double-clicking in the upper left corner of the **Data** window. In the dialog that appears, type `batch.qcc` in the **Name** field and click **OK**.

We create a Number (np) Shewhart chart for these data.

1. Open the **Quality Control Charts (Counts and Proportions)** dialog.
2. Type `batch.qcc` in the **Data Set** field.
3. Select `NumBad` as the **Variable**.
4. Select `NumSample` as the **Size Column**.
5. Select **Number (np)** as the **Chart Type**.
6. Click **OK**.

A Shewhart chart of the `NumBad` data with group size indicated by `NumSample` appears in a **Graph Sheet**.

RESAMPLE

In statistical analysis, the researcher is usually interested in obtaining not only a point estimate of a statistic, but also the variation in the point estimate, as well as confidence intervals for the true value of the parameter. For example, a researcher may calculate not only a sample mean, but also the standard error of the mean and a confidence interval for the mean.

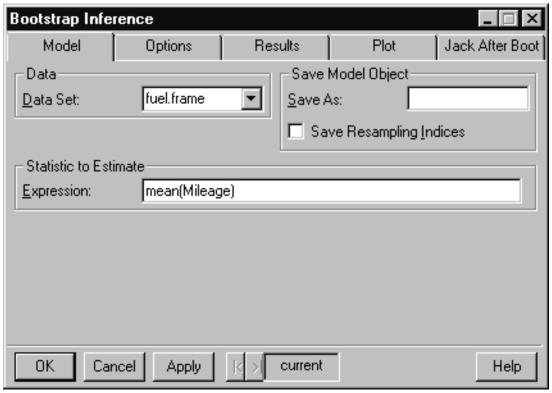
The traditional methods for calculating standard errors and confidence intervals generally rely upon a statistic, or some known transformation of it, being asymptotically normally distributed. If this normality assumption does not hold, the traditional methods may be inaccurate. Resampling techniques such as the bootstrap and jackknife provide estimates of the standard error, confidence intervals, and distributions for any statistic. To use these procedures, you must supply the name of the data set under examination and an S-PLUS function or expression that calculates the statistic of interest.

Bootstrap Inference

In the *bootstrap*, a specified number of new samples are drawn by sampling with replacement from the data set of interest. The statistic of interest is calculated for each set of data, and the resulting set of estimates is used as an empirical distribution for the statistic.

Performing bootstrap inference

From the main menu, choose **Statistics ► Resample ► Bootstrap**. The **Bootstrap Inference** dialog opens, as shown in Figure 6.77.



Data Set: fuel.frame

Save As:

□ Save Resampling Indices

Expression: mean(Mileage)

Figure 6.77: *The* ***Bootstrap Inference*** *dialog.*

Example 1

The data set `fuel.frame` is taken from the April 1990 issue of *Consumer Reports*. It contains 60 observations (rows) and 5 variables (columns). Observations of weight, engine displacement, mileage, type, and fuel were taken for each of sixty cars. We obtain bootstrap estimates of mean and variation for the mean of the `Mileage` variable.

1. Open the **Bootstrap Inference** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type `mean(Mileage)` in the **Expression** field.
4. On the **Options** page, type **250** in the **Number of Resamples** field to perform fewer than the default number of resamples. This speeds up the computations required for this example.
5. Click on the **Plot** page, and notice that the **Distribution of Replicates** plot is selected by default.
6. Click **OK**.

A bootstrap summary appears in the **Report** window, and a histogram with a density line is plotted in a **Graph Sheet**.

Example 2

In this example, we obtain bootstrap estimates of mean and variation for the coefficients of a linear model. The model we use predicts `Mileage` from `Weight` and `Disp.` in the `fuel.frame` data set.

1. Open the **Bootstrap Inference** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type the following in the **Expression** field:

   ```
   coef(lm(Mileage ~ Weight+Disp., data=fuel.frame))
   ```

4. On the **Options** page, type **250** in the **Number of Resamples** field to perform fewer than the default number of resamples. This speeds up the computations required for this example.
5. Click on the **Plot** page, and notice that the **Distribution of Replicates** plot is selected by default.
6. Click **OK**.

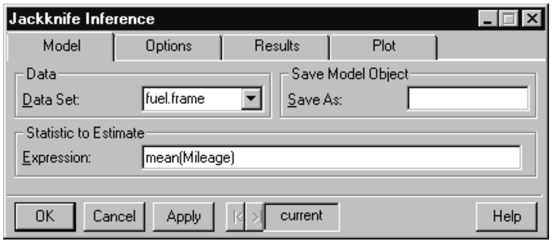
A bootstrap summary appears in the **Report** window. In addition, three histograms with density lines (one for each coefficient) are plotted in a **Graph Sheet**.

Jackknife Inference

In the jackknife, new samples are drawn by replicating the data, leaving out a single observation from each sample. The statistic of interest is calculated for each set of data, and this jackknife distribution is used to construct estimates.

Performing jackknife inference

From the main menu, choose **Statistics ► Resample ► Jackknife**. The **Jackknife Inference** dialog opens, as shown in Figure 6.78.



Data Set: fuel.frame

Save As:

Expression: mean(Mileage)

Figure 6.78: *The* ***Jackknife Inference*** *dialog.*

Example 1

We obtain jackknife estimates of mean and variation for the mean of `Mileage` in the `fuel.frame` data.

1. Open the **Jackknife Inference** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type `mean(Mileage)` in the **Expression** field.
4. Click on the **Plot** page, and notice that the **Distribution of Replicates** plot is selected by default.
5. Click **OK**.

A jackknife summary appears in the **Report** window, and a histogram with a density line is plotted in a **Graph Sheet**.

Example 2

In this example, we obtain jackknife estimates of mean and variation for the coefficients of a linear model. The model we use predicts `Mileage` from `Weight` and `Disp.` in the `fuel.frame` data set.

1. Open the **Jackknife Inference** dialog.
2. Type `fuel.frame` in the **Data Set** field.
3. Type the following in the **Expression** field:

   ```
   coef(lm(Mileage ~ Weight+Disp., data=fuel.frame))
   ```

4. Click on the **Plot** page, and notice that the **Distribution of Replicates** plot is selected by default.
5. Click **OK**.

A jackknife summary appears in the **Report** window. In addition, three histograms with density lines (one for each coefficient) are plotted in a **Graph Sheet**.

SMOOTHING

Smoothing techniques model a univariate response as a smooth function of a univariate predictor. With standard regression techniques, parametric functions are fit to scatter plot data. Frequently, you do not have enough prior information to determine what kind of parametric function to use. In such cases, you can fit a *nonparametric curve*, which does not assume a particular type of relationship.

Nonparametric curve fits are also called *smoothers* since they attempt to create a smooth curve showing the general trend in the data. The simplest smoothers use a *running average*, where the fit at a particular *x* value is calculated as a weighted average of the *y* values for nearby points. The weight given to each point decreases as the distance between its *x* value and the *x* value of interest increases. In the simplest kind of running average smoother, all points within a certain distance (or window) from the point of interest are weighted equally in the average for that point. The window width is called the *bandwidth* of the smoother, and is usually given as a percentage of the total number of data points. Increasing the bandwidth results in a smoother curve fit but may miss rapidly changing features. Decreasing the bandwidth allows the smoother to track rapidly changing features more accurately, but results in a rougher curve fit.

More sophisticated smoothers add variations to the running average approach. For example, smoothly decreasing weights or local linear fits may be used. However, all smoothers have some type of smoothness parameter (bandwidth) controlling the smoothness of the curve. The issue of good bandwidth selection is complicated and has been treated in many statistical research papers. You can, however, gain a good feeling for the practical consequences of varying the bandwidth by experimenting with smoothers on real data.

This section describes how to use four different types of smoothers.

- **Kernel Smoother**: a generalization of running averages in which different weight functions, or *kernels*, may be used. The weight functions provide transitions between points that are smoother than those in the simple running average approach.
- **Loess Smoother**: a noise-reduction approach that is based on local linear or quadratic fits to the data.

- **Spline Smoother**: a technique in which a sequence of polynomials is pieced together to obtain a smooth curve.
- **Supersmoother**: a highly automated variable span smoother. It obtains fitted values by taking weighted combinations of smoothers with varying bandwidths.

Kernel Smoother

A *kernel smoother* is a generalization of running averages in which different weight functions, or *kernels*, may be used. The weight functions provide transitions between points that are smoother than those in the simple running average approach. By default, the bandwidth for the Spotfire S+ kernel smoother is 0.5, which includes roughly half of the data points in each smoothing window.

The default kernel is a *box* or *boxcar smoother*, which weighs each point within the smoothing window equally. Other choices include a triangle, a Parzen kernel, and the Gaussian kernel. With a *triangle kernel*, the weights decrease linearly as the distance from the point of interest increases, so that the points on the edge of the smoothing window have a weight near zero. A *Parzen kernel* is a box convolved with a triangle. With a *normal* or *Gaussian kernel*, the weights decrease with a Gaussian distribution away from the point of interest.

Local Regression (Loess)

Local regression, or *loess*, was developed by W.S. Cleveland and others at Bell Laboratories. It is a clever approach to smoothing that is essentially a noise-reduction algorithm. Loess smoothing is based on local linear or quadratic fits to the data: at each point, a line or parabola is fit to the points within the smoothing window, and the predicted value is taken as the y value for the point of interest. Weighted least squares is used to compute the line or parabola in each window. Connecting the computed y values results in a smooth curve.

For loess smoothers, the bandwidth is referred to as the *span* of the smoother. The span is a number between 0 and 1, representing the percentage of points that should be included in the fit for a particular smoothing window. Smaller values result in less smoothing, and very small values close to 0 are not recommended. If the span is not specified, an appropriate value is computed using cross-validation. For small samples $(n < 50)$, or if there are substantial serial correlations between observations close in x value, a prespecified fixed span smoother should be used.

Spline Smoother

Spline smoothers are computed by piecing together a sequence of polynomials. Cubic splines are the most widely used in this class of smoothers, and involve locally cubic polynomials. The local polynomials are computed by minimizing a penalized residual sum of squares. Smoothness is assured by having the value, slope, and curvature of neighboring polynomials match at the points where they meet. Connecting the polynomials results in a smooth fit to the data. The more accurately a smoothing spline fits the data values, the rougher the curve, and vice versa.

The smoothing parameter for splines is called the *degrees of freedom.* The degrees of freedom controls the amount of curvature in the fit, and corresponds to the degree of the local polynomials. The lower the degrees of freedom, the smoother the curve. The degrees of freedom automatically determines the smoothing window, by governing the trade-off between smoothness of the fit and fidelity to the data values. For n data points, the degrees of freedom should be between 1 and $n-1$. Specifying $n-1$ degrees of freedom results in a curve that passes through each of the data points exactly. Spotfire S+ uses 3 degrees of freedom by default, which corresponds to cubic splines.

Supersmoother

The *supersmoother* is a highly automated variable span smoother. It obtains fitted values by taking a weighted combination of smoothers with varying bandwidths. The smoothing parameter for supersmoothers is called the *span.* The span is a number between 0 and 1, representing the percentage of points that should be included in the fit for a particular smoothing window. Smaller values result in less smoothing, and very small values close to 0 are not recommended. If the span is not specified, an appropriate value is computed using crossvalidation. For small samples $(n < 50)$, or if there are substantial serial correlations between observations close in *x* value, a prespecified fixed span smoother should be used.

Examples

The `air` data set contains 111 observations (rows) and 4 variables (columns). It is taken from an environmental study that measured the four variables ozone, solar radiation, temperature, and wind speed for 111 consecutive days. We create smooth plots of `ozone` versus `radiation`.

1. Choose **Statistics ► Smoothing ► Kernel Smoother**. Type `air` as the **Data Set**. Select `radiation` as the **x Columns**, `ozone` as the **y Columns**, and then click **OK**. A **Graph Sheet** is created containing a plot of `ozone` versus `radiation` with a kernel smooth.
2. Choose **Statistics ► Smoothing ► Loess Smoother**. Type `air` as the **Data Set**. Select `radiation` as the **x Columns**, `ozone` as the **y Columns**, and then click **OK**. A **Graph Sheet** is created containing a plot of `ozone` versus `radiation` with a loess smooth.
3. Choose **Statistics ► Smoothing ► Spline Smoother**. Type `air` as the **Data Set**. Select `radiation` as the **x Columns**, `ozone` as the **y Columns**, and then click **OK**. A **Graph Sheet** is created containing a plot of `ozone` versus `radiation` with a smoothing spline smooth.
4. Choose **Statistics ► Smoothing ► Supersmoother**. Type `air` as the **Data Set**. Select `radiation` as the **x Columns**, `ozone` as the **y Columns**, and then click **OK**. A **Graph Sheet** is created containing a plot of `ozone` versus `radiation` with a supersmoother smooth.

TIME SERIES

Time series techniques are applied to sequential observations, such as daily measurements. In most statistical techniques, such as linear regression, the organization of observations (rows) in the data is irrelevant. In contrast, time series techniques look for correlations between neighboring observations.

This section discusses the time series available from the **Statistics ▶ Time Series** menu:

- **Autocorrelations**: calculates autocorrelations, autocovariances, or partial autocorrelations for sequential observations.
- **ARIMA**: fits autoregressive integrated moving average models to sequential observations. These are very general models that allow inclusion of autoregressive, moving average, and seasonal components.
- **Lag plot:** plots a time series versus lags of the time series.
- **Spectrum plot:** plots the results of a spectrum estimation.

We use these techniques to examine the structure in an environmental data set.

Autocorrelations

The *autocovariance function* is an important tool for describing the serial (or temporal) dependence structure of a univariate time series. It reflects how much correlation is present between lagged observations.

Plotting autocorrelations

From the main menu, choose **Statistics ▶ Time Series ▶ Autocorrelations**. The **Autocorrelations and Autocovariances** dialog opens, as shown in Figure 6.79.

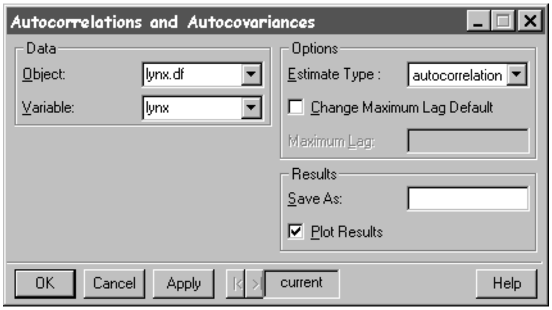


Figure 6.79: *The* ***Autocorrelations and Autocovariances*** *dialog.*

Example

The example data set `lynx.df`, located in the `example5` library, contains the annual number of lynx trappings in the Mackenzie River District of northwest Canada for the period 1821 to 1934. Figure 6.80 displays the data.

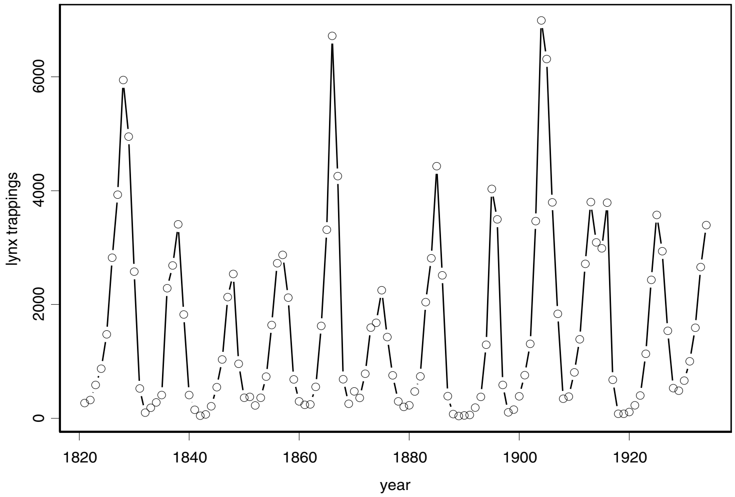


Figure 6.80: *Lynx trappings in the Mackenzie River District of northwest Canada.*

A definite cycle is present in the data. We can use autocorrelations to explore the length of the cycle.

1. Choose **File ▶ Load Library** to load the `example5` library. Highlight `example5` in the **Library Name** list and click **OK**. This library contains a few example data sets that are not in the main Spotfire S+ databases.
2. Open the **Autocorrelations and Autocovariances** dialog.
3. Type `lynx.df` in the **Data Set** field.
4. Select `lynx` as the **Variable**.
5. Click **OK**.

Figure 6.81 displays the resulting autocorrelation plot. The peaks at 10 and troughs at 5 reflect a ten-year cycle.

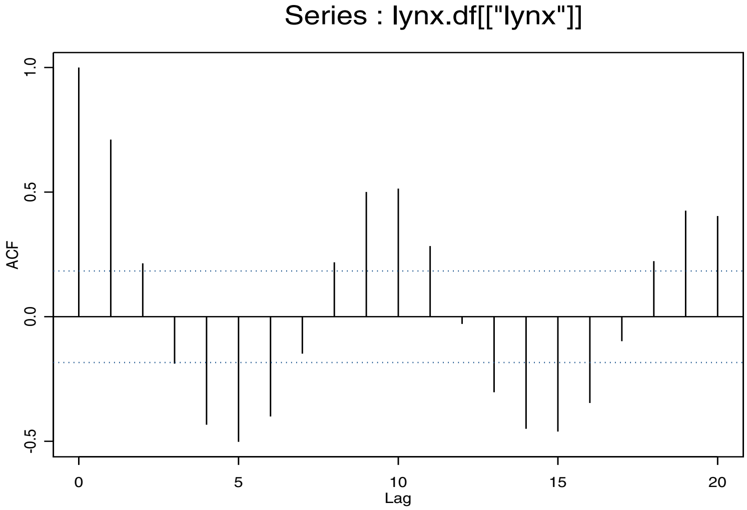


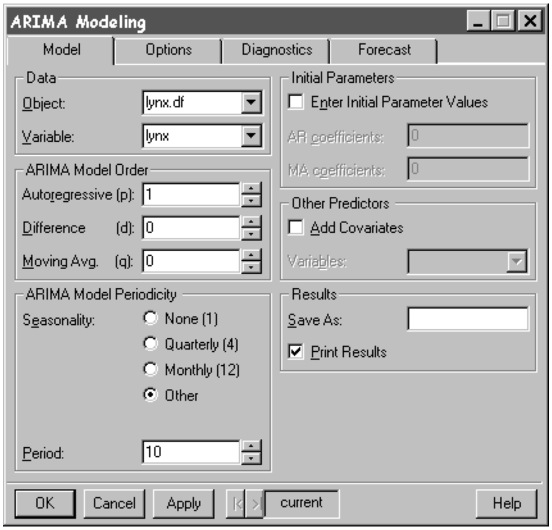
Figure 6.81: *Autocorrelation plot of the `lynx.df` data.*

ARIMA

Autoregressive integrated moving-average (ARIMA) models are useful for a wide variety of time series analyses, including forecasting, quality control, seasonal adjustment, and spectral estimation, as well as providing summaries of the data.

Fitting an ARIMA model

From the main menu, choose **Statistics ▶ Time Series ▶ ARIMA Models**. The **ARIMA Modeling** dialog opens, as shown in Figure 6.82.



Object: lynx.df

Variable: lynx

Autoregressive (p): 1

Difference (d): 0

Moving Avg. (q): 0

Seasonality: ○ None (1) ○ Quarterly (4) ○ Monthly (12) ● Other

Period: 10

☐ Enter Initial Parameter Values

AR coefficients: 0

MA coefficients: 0

☐ Add Covariates

Variables:

Save As:

☑ Print Results

Figure 6.82: *The **ARIMA Modeling** dialog.*

Example

In Autocorrelations on page 359, we computed autocorrelations for the `lynx.df` time series. The autocorrelation plot in Figure 6.81 displays correlations between observations in the `lynx.df` data, with a ten-year cycle to the correlations. We can model this as an autoregressive model with a period of 10.

1. If you have not done so already, choose **File ▶ Load Library** to load the `example5` library. The `example5` library contains the `lynx.df` data.
2. Open the **ARIMA Modeling** dialog.
3. Type `lynx.df` in the **Data Set** field.
4. Select `lynx` as the **Variable**.
5. Specify an **Autoregressive Model Order** of 1.
6. Select **Other** as the **Seasonality**.

7. Specify a **Period** of 10.
8. Click **OK**.

Summaries for the ARIMA model are displayed in the **Report** window:

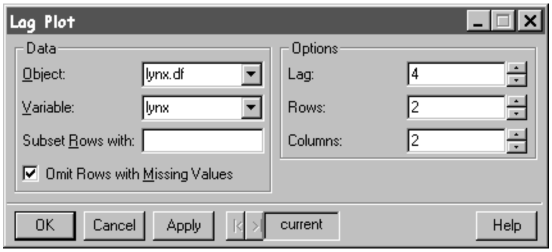
```
  ***  ARIMA Model Fitted to Series lynx.df[["lynx"]] ***

Call: arima.mle(x = lynx.df[["lynx"]], model = model,
  xreg = xreg, max.iter = nlmin.max.iter, max.fcal =
  nlmin.max.fcal)
Method:  Maximum Likelihood
Model :  1 0 0
Period:  10

Coefficients:
  AR : 0.73883

Variance-Covariance Matrix:
            ar(10)
ar(10) 0.004366605

Optimizer has  converged
Convergence Type: relative function convergence
AIC: 1793.16261
```

Lag Plot

The **Lag Plot** dialog plots a time series versus lags of the time series.

Creating a lag plot

From the main menu, choose **Statistics** ► **Time Series** ► **Lag Plot**. The **Lag Plot** dialog opens, as shown in Figure 6.83.



Lag Plot

Data

Object: lynx.df

Variable: lynx

Subset Rows with:

☑ Omit Rows with Missing Values

Options

Lag: 4

Rows: 2

Columns: 2

Figure 6.83: *The **Lag Plot** dialog.*

Example

In Autocorrelations on page 359, we computed autocorrelations for the `lynx.df` time series. In this example, we use a lag plot to example the correlation between observations at different lags.

1. If you have not done so already, choose **File ▶ Load Library** to load the `example5` library. The `example5` library contains the `lynx.df` data.
2. Open the **Lag Plot** dialog.
3. Type `lynx.df` in the **Data Set** field.
4. Select `lynx` as the **Variable**.
5. Select a **Lag** of **4**.
6. Select a layout of **2 Rows** by **2 Columns**.
7. Click **OK**.

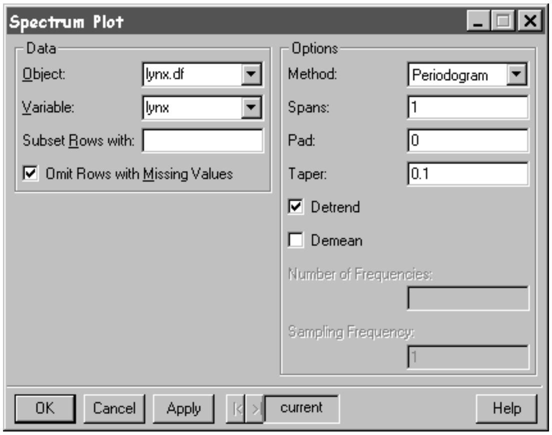
A lag plot of the `lynx.df` data appears in a **Graph Sheet**.

Spectrum Plot

The **Spectrum Plot** dialog plots the results of a spectral estimation. This plot displays the estimated spectrum for a time series using either a smoothed periodogram or autoregressive parameters.

Creating a spectrum plot

From the main menu, choose **Statistics ▶ Time Series ▶ Spectrum Plot**. The **Spectrum Plot** dialog opens, as shown in Figure 6.84.



Object: lynx.df

Variable: lynx

Subset Rows with:

☑ Omit Rows with Missing Values

Method: Periodogram

Spans: 1

Pad: 0

Taper: 0.1

☑ Detrend

□ Demean

Number of Frequencies:

Sampling Frequency: 1

Figure 6.84: *The* ***Spectrum Plot*** *dialog.*

Example

In Autocorrelations on page 359, we computed autocorrelations for the `lynx.df` time series. In this example, we plot a smoothed periodogram of the `lynx.df` data to examine the periodicities in the series.

1. If you have not done so already, choose **File ► Load Library** to load the `example5` library. The `example5` library contains the `lynx.df` data.
2. Open the **Spectrum Plot** dialog.
3. Type `lynx.df` in the **Data Set** field
4. Select `lynx` as the **Variable**.
5. Click **OK**.

A spectrum plot of the `lynx.df` data appears in a **Graph Sheet**.

RANDOM NUMBERS AND DISTRIBUTIONS

The **Data** menu provides tools for generating random numbers and calculating values related to theoretical distributions. These techniques include:

- **Random sample of rows:** sampling from a data set.
- **Distribution functions:** performing calculations regarding a specific distribution.
- **Random numbers:** creating data sets of random numbers from specified distributions.

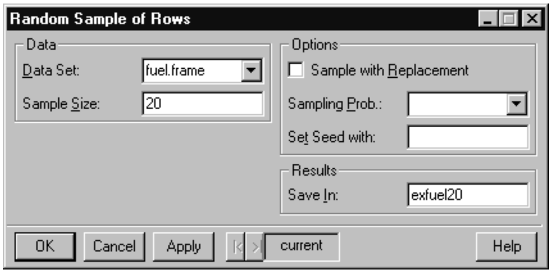
Additional data operations that are less statistical in nature are described in Chapter 2, Working With Data.

Random Sample of Rows

Sometimes we have a data set and we want to randomly select a certain number of rows from that data. The **Random Sample of Rows** dialog does this. It can also be used to randomize (permute) the rows in a data set.

Taking a random sample of rows

Choose **Data** ► **Random Sample**. The **Random Sample of Rows** dialog opens, as shown in Figure 6.85.



Random Sample of Rows

Data

Data Set: fuel.frame

Sample Size: 20

Options

☐ Sample with Replacement

Sampling Prob.:

Set Seed with:

Results

Save In: exfuel20

Figure 6.85: *The **Random Sample of Rows** dialog.*

Example

The data set `fuel.frame` is taken from the April 1990 issue of *Consumer Reports*. It contains 60 observations (rows) and 5 variables (columns). Observations of weight, engine displacement, mileage, type, and fuel were taken for each of sixty cars. In the `fuel.frame` data, we randomly sample 20 of these 60 cars and place them in a new data set named `exfuel20`.

1. Open the **Random Sample of Rows** dialog.
2. Enter `fuel.frame` in the **Data Set** field.
3. Enter a **Sample Size** of 20 and type `exfuel20` in the **Save In** field.
4. Click **OK**.

The data set `exfuel20` containing the new sample is created and displayed in a **Data** window.

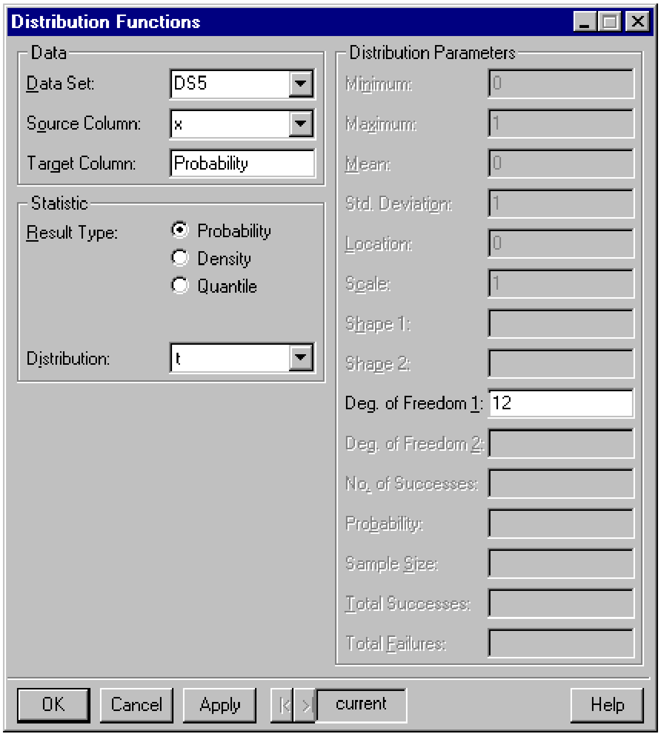
The **Random Sample of Rows** dialog can also be used to randomize (permute) rows. To do this, set the **Sample Size** to be the number of observations in the data set, and check the **Sample with Replacement** option. All rows are included in the new data set, but their order is randomly permuted.

Distribution Functions

The **Distribution Functions** dialog computes density values, cumulative probabilities, or quantiles from a specified distribution. The purpose of this dialog is to generate distributional information from data sets or sequences of numbers. We can use it to calculate *p* values and rejection regions for our tests, or to plot and visualize a variety of distributions.

Computing distribution functions

From the main menu, choose **Data ▶ Distribution Functions**. The **Distribution Functions** dialog opens, as shown in Figure 6.86.



Data Set: DS5

Source Column: x

Target Column: Probability

Result Type: ● Probability ○ Density ○ Quantile

Distribution: t

Minimum: 0

Maximum: 1

Mean: 0

Std. Deviation: 1

Location: 0

Scale: 1

Deg. of Freedom 1: 12

Figure 6.86: *The* ***Distribution Functions*** *dialog.*

Example 1: Calculating p values

The **Distribution Functions** dialog can be used to generate rejection regions and *p* values for statistical tests. For example, suppose we conduct a two-sided, pooled *t* test. Our null and alternative hypotheses are as follows:

$$H_0 \colon \mu_1 = \mu_2$$

$$H_A \colon \mu_1 \neq \mu_2$$

Our *t* statistic is -2.10 with 12 degrees of freedom. What is the *p* value for this test?

1. Open an empty data set by clicking the **New Data Set** button on the **Standard** toolbar.

2. Enter the values -2.10 and 2.10 in the first column. Since the t distribution is symmetric about zero, we calculate probabilities at both -2.10 and 2.10 to obtain values in both tails.
3. Change the name of the first column to `x`.
4. Open the **Distribution Functions** dialog.
5. Verify that the name of the data set appears in the **Data Set** field and select `x` as the **Source Column**.
6. To calculate *p* values, we leave the **Probability** result type selected. Choose **t** from the **Distribution** pull-down menu, and enter **12** in the **Deg. of Freedom 1** field.
7. Click **OK**.

A new column named `Probability` appears in the data set. The column contains the cumulative probabilities 0.02877247 and 0.97122753, corresponding to the values in `x`. To see more decimal places in the display, highlight the `Probability` column and click the **Increase Precision** button +.0 .00 on the **Data** window toolbar.

To convert a computed probability into a *p* value, we calculate:

$$p = 2(1 - F_v(|t|)) .$$

We multiply our result by 2 because our alternative hypothesis is two-sided. How we calculate *p* values from the cumulative probability function always depends on our alternative hypothesis:

$H_A\colon \mu_1 < \mu_2$ *p* value $= F_v(t)$

$H_A\colon \mu_1 > \mu_2$ *p* value $= 1 - F_v(t)$

$H_A\colon \mu_1 \neq \mu_2$ *p* value $= 2(1 - F_v(|t|))$

Here, $F_v(t)$ is the cumulative distribution function of the t distribution with v degrees of freedom. For the t statistic of -2.10, this gives us a *p* value of $2(1 - 0.97122753)\ =\ 0.05754494$.

Example 2: Calculating rejection regions

Calculating a rejection region for a level α test is straightforward. Suppose we are testing if the variance of one population is larger than the variance of a second population. That is, the null and alternative hypotheses are:

$$H_0\text{: } \sigma_1^2 = \sigma_2^2$$

$$H_A\text{: } \sigma_1^2 > \sigma_2^2$$

Suppose we calculate an F statistic of $f = 3.9$ from the sample data, and suppose that the two samples are of sizes $m = 12$ and $n = 10$. For a level 0.05 test, we reject the null hypothesis if $f \geq F_{\alpha,\, m-1,\, n-1} = F_{0.05,\, 11,\, 9}$. To find the rejection region, we must calculate the quantile at $1 - 0.05 = 0.95$ for the F distribution with 11 and 9 degrees of freedom.

1. Open an empty data set by clicking the **New Data Set** button on the **Standard** toolbar.
2. Enter the value 0.95 in the first row of the first column. Change the name of the first column to `x`.
3. Open the **Distribution Functions** dialog.
4. Verify that the name of the data set appears in the **Data Set** field and select `x` as the **Source Column**.
5. To calculate quantiles, check the **Quantile** result type.
6. Select **f** from the **Distribution** pull-down menu. Enter 11 and 9, respectively, in the **Deg. of Freedom 1** and **Deg. of Freedom 2** fields.
7. Click **OK**.

A new column named `Quantile` appears in the data set. The column contains the quantile 3.102485 corresponding to the value in `x`. Thus, the rejection region for the F distribution with 11 and 9 degrees of freedom at the 0.05 level is 3.102485. To see more decimal places in the display, highlight the `Quantile` column and click the **Increase Precision** button on the **Data** window toolbar.

Since our calculated F statistic of 3.9 falls in our rejection region, we reject the null hypothesis and conclude that the variance of population 1 is greater than the variance of population 2. A similar procedure can be used to calculate the rejection region of many common tests.

Example 3: Plotting the normal distribution

The **Distribution Functions** dialog allows us to easily graph a probability distribution, such as the normal distribution shown in Figure 6.87.

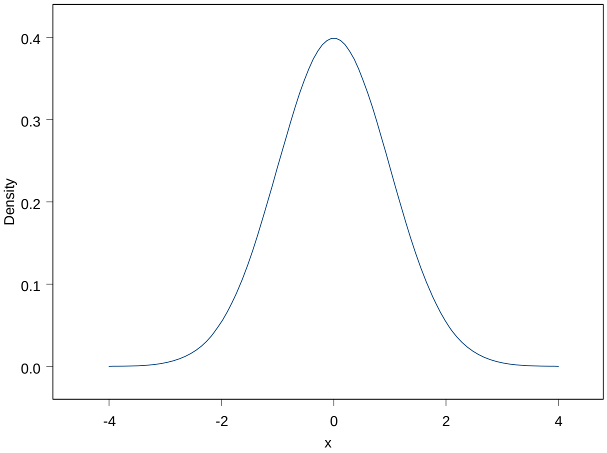


Figure 6.87: *The normal distribution with mean 0 and standard deviation 1.*

The following steps generate the plot of the normal distribution in Figure 6.87:

1. Open an empty data set by clicking the **New Data Set** button ▦ on the **Standard** toolbar.
2. From the main menu, choose **Data ▶ Fill**.
3. Type x in the **Columns** field and 100 as the **Length**. Specify a **Start** value of **-4** and an **Increment** of **0.0808**.
4. Click **OK**. This generates a column named x containing 100 equispaced values between -4 and 4.
5. Open the **Distribution Functions** dialog.

6. Verify that the name of the data set appears in the **Data Set** field and select `x` as the **Source Column**.
7. To calculate density values, check the **Density** option.
8. Select **normal** from the **Distribution** pull-down menu. Note the default values of **0** and **1** for the **Mean** and **Std. Deviation**.
9. Click **OK**. Spotfire S+ generates the density corresponding to each `x` value and places it in a new `Density` column.
10. Highlight the `x` column in the **Data** window, and then CTRL-click to simultaneously highlight the `Density` column.
11. Open the **Plots 2D** palette and click on the **Line** plot button. Spotfire S+ plots `Density` versus `x` in a **Graph Sheet**.

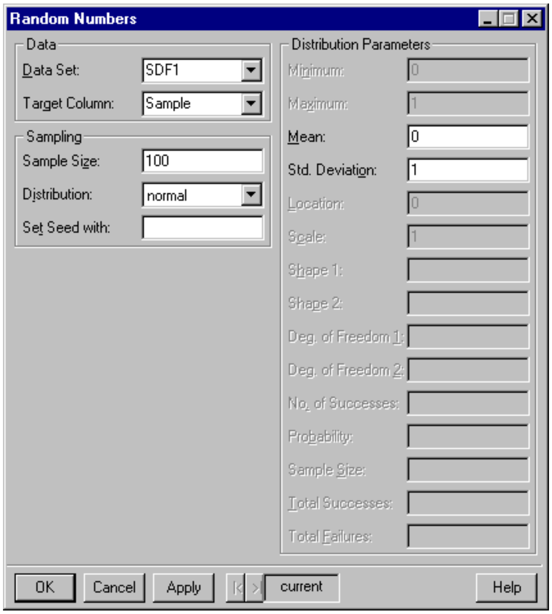
The above procedure can be followed to generate plots of many different distributions.

Random Numbers

You can generate random numbers from a variety of distributions using the **Random Numbers** dialog.

Generating random numbers

From the main menu, choose **Data ► Random Numbers**. The **Random Numbers** dialog opens, as shown in Figure 6.88.



Random Numbers

Data

Data Set: SDF1

Target Column: Sample

Sampling

Sample Size: 100

Distribution: normal

Set Seed with:

Distribution Parameters

Minimum: 0

Maximum: 1

Mean: 0

Std. Deviation: 1

Location: 0

Scale: 1

Shape 1:

Shape 2:

Deg. of Freedom 1:

Deg. of Freedom 2:

No. of Successes:

Probability:

Sample Size:

Total Successes:

Total Failures:

Figure 6.88: *The* ***Random Numbers*** *dialog.*

Example

One way to develop an intuitive sense for the shape of a distribution is to repeatedly plot histograms of sampled data. Consider the shape of the normal density in Figure 6.87. If we state that a population distribution is normal, we are saying that the data have this shape. In other words, if we sample 100 observations from the population and generate a histogram from the data, we would expect the histogram to look similar to Figure 6.89. Let’s test how well this works in practice.

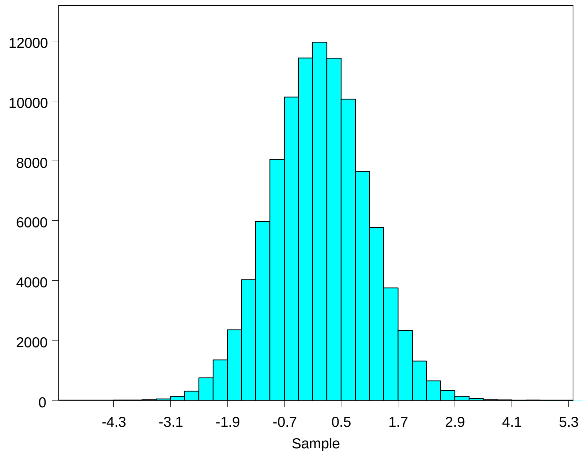


Figure 6.89: *A histogram of normal data.*

1. Open an empty data set by clicking the **New Data Set** button on the **Standard** toolbar.
2. Open the **Random Numbers** dialog.
3. Verify that the name of the data set appears in the **Data Set** field.
4. Type `Sample` in the field for **Target Column**.
5. Enter a **Sample Size** of 100 and select **normal** from the **Distribution** pull-down menu. Note the default values of **0** and **1** for the **Mean** and **Std. Deviation**.
6. Click **Apply**. Spotfire S+ generates the sample of random numbers and places it in a `Sample` column of the data set.
7. Highlight the `Sample` column in the **Data** window.
8. Open the **Plots 2D** palette and click the **Histogram** button . Spotfire S+ plots a histogram of the 100 observations.
9. One aspect that might strike you about the histogram is how much it does *not* look like Figure 6.87 or Figure 6.89. Since the **Random Numbers** dialog is still open, you can generate a new sample of data by simply clicking **Apply** again. A new

data set is generated, and the histogram is automatically redrawn for the new data. Click **Apply** several times and watch the histogram change.

10. Vary the **Sample Size** and notice how the histogram changes.

The larger the sample size, the more likely the histogram is to look like Figure 6.89. However, even for larger data sets, the histogram rarely approaches the almost perfect look of Figure 6.89. For small sample sizes, the shapes you see may not even resemble the normal-shaped histogram we expect. Yet every single data set is normal: we know this because we generated the data from a normal distribution.

The lesson in this example is that we should not be overly concerned if we have a small data set and its histogram does not look exactly normal. If we have reason to believe the data set is normally distributed, the histogram needs to be very skewed for us to change our mind. For large data sets, the normal curve should be more evident in the histogram, but even then, we should not concern ourselves too much by slight variations from the normal curve that we expect to see.

Figure 6.89 was generated using 100,000 observations. Try plotting some different distributions using large sample sizes (say 1,000 or 10,000 observations). Note the shapes of the different distributions.

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WORKING WITH OBJECTS AND DATABASES

7

INTRODUCTION

The Spotfire S+ environment is object-oriented, meaning everything in Spotfire S+ is a distinct, editable object–from data sets, **Graph Sheets**, and functions to menus, dialogs, toolbars, and toolbar buttons. Some of these objects, such as data sets and functions, are automatically stored by Spotfire S+ in internal databases. Other types of objects, like **Graph Sheets** and scripts, exist only in the current session and must be saved to disk to be permanently stored.

We begin this chapter by describing the three types of S-PLUS objects and examine how they relate to databases and files. Next we take a close look at the **Object Explorer**, a powerful interface for manipulating and visually organizing your objects into a meaningful structure. Finally, we end the chapter with a discussion of project folders and chapters and describe how to use these tools to organize your work into projects.

UNDERSTANDING OBJECT TYPES AND DATABASES

S-PLUS Object Types

There are three basic types of objects in S-PLUS:

- *Engine objects*, such as data frames, functions, and lists
- *Interface objects*, such as menu items, toolbars, and dialogs
- *Document objects*, such as **Graph Sheets**, reports, and scripts

Engine Objects

Engine objects are created and used by the Spotfire S+ interpreter during the execution of code. These types of objects are automatically stored by Spotfire S+ in internal databases.

Vectors

A vector is the most basic object in S-PLUS. It is a one-dimensional array of data values of a single *mode*, usually numbers. Vectors may also contain other types of data, such as character strings and logical variables. Some statistical techniques produce vectors, and they are also useful in programming.

Matrices

Another important object in S-PLUS is the matrix, a rectangular, two-dimensional array of data values in which all the elements are of the same mode. Like vectors, matrices are produced by some statistical techniques, and they too are useful in programming.

Data frames

In Spotfire S+, the primary structure for storing two-dimensional data is the data frame.

Note

Throughout this *User's Guide*, we have rather loosely referred to two-dimensional data as *data sets.* However, in Spotfire S+ every object has a particular *class*, and the class of these objects is `data.frame`.

Classes and *methods* play an important part in programming in Spotfire S+. For a thorough treatment of these concepts, see the *Programmer's Guide.*

A data frame can contain columns of differing mode. For example, in a two-column data frame, one column can contain numeric data while the second column can contain character data. In a data frame, each row represents an experimental unit.

Lists

A list is the most general and most flexible object for holding data in Spotfire S+. A list is an ordered collection of *components*. Each component can be any data object, and different components can be of different modes. For example, a list might have three components consisting of a vector of character strings, a matrix of numbers, and another list.

Functions

A function is an object containing Spotfire S+ interpreted code that performs an analytical task using data and other function objects. In addition to accessing the functions built into S-PLUS, you can also write your own functions in the S-PLUS language.

Other engine objects

There are a number of more esoteric objects primarily used in programming, such as expressions, names, and formulas. For more information on these types of objects, consult the *Programmer's Guide*.

Interface Objects

Interface objects reside in memory during the execution of the Spotfire S+ application. They are loaded at startup and archived when the application is closed. These archived files can be found in your preferences (**.Prefs**) folder.

Some types of interface objects, such as menu items and toolbars, can be used to customize the user interface. For more information, see Chapter 8, Extending the User Interface, in the *Application Developer's Guide*.

Document Objects

Document objects are displayed as “child” windows of the Spotfire S+ application. Unlike engine objects, document objects are not saved in databases. To permanently store these types of objects, you must save them in files. Note that the file format of a document object is unique to its particular type.

Graph Sheets

A **Graph Sheet** (***.sgr** file) is a document object containing a graph. Because Spotfire S+ is object-oriented, each element of a **Graph Sheet** is itself an editable object. In the **Object Explorer**, a **Graph Sheet** is displayed in a hierarchical fashion, with the top-most object being the **Graph Sheet** itself.

Scripts

A script (***.ssc** file) is a document object containing S-PLUS scripting code.

Reports

A report (***.rtf** or ***.srp** file) is a document object containing output.

Object Explorer

As we will see in the next section, the **Object Explorer** is the handy interface that makes it easy for you to manipulate and visually organize your S-PLUS objects. The **Object Explorer** (***.sbf** file) is itself a document object that you can save in a file.

Databases

As we noted in the previous section, engine objects are stored in internal *databases*. The *system databases* contain thousands of built-in engine objects, including functions and sample data sets. In addition, as you create your own data sets and functions, Spotfire S+ automatically saves these objects in a special database called the *working data*.

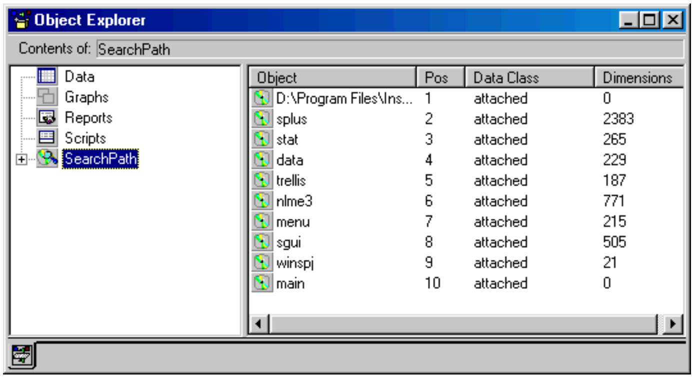
The Search Path

The *search path* displays all the databases that are currently attached, in the order in which Spotfire S+ searches them when you request an object.

To see the databases in the search path, do the following:

1. Open the **Object Explorer** by clicking the **Object Explorer** button on the **Standard** toolbar. (The **Object Explorer** is discussed in detail in the next section.)
2. Click the `SearchPath` object's icon in the left pane of the **Object Explorer**.

As shown in Figure 7.1, the right pane of the **Object Explorer** displays the names (or full pathname, in the case of the working data) and search path positions (in the **Pos** column) of all the attached S-PLUS databases.



Contents of: SearchPath

Object	Pos	Data Class	Dimensions
D:\Program Files\Ins...	1	attached	0
splus	2	attached	2383
stat	3	attached	265
data	4	attached	229
trellis	5	attached	187
nlme3	6	attached	771
menu	7	attached	215
sgui	8	attached	505
winspj	9	attached	21
main	10	attached	0

Figure 7.1: *The search path displayed in the right pane of the* ***Object Explorer****.*

Hint

If the name or pathname of a database is truncated, as in Figure 7.1, simply pause your cursor over it to display a ToolTip containing the full text.

The Working Data

The most important thing to notice in Figure 7.1 is the database in position one (**Pos 1**) of the search path. By definition, the database in position one is the working data, the database in which Spotfire S+ automatically saves all the data and function objects you create or modify.

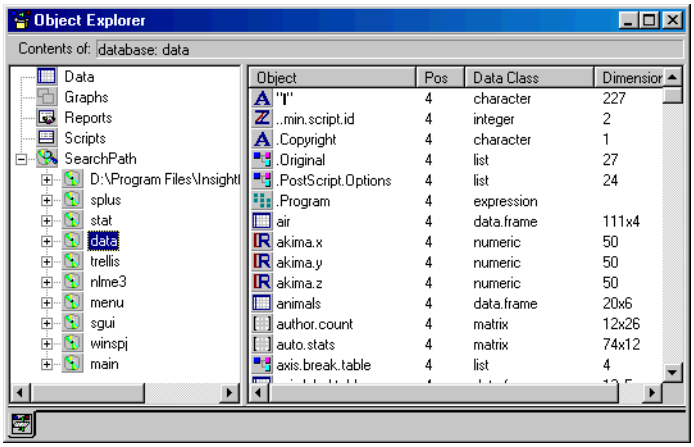
Note

You can find the Windows folder named **.Data** that corresponds to the working data by using the full pathname displayed in the search path.

The remaining databases in the search path in Figure 7.1 are the Spotfire S+ system databases. To see the objects stored in a system database, do the following:

1. Expand the `SearchPath` object in the left pane of the **Object Explorer** by clicking the "+" to the left of its icon.

2. In the left pane, select a database (for example, **data**) by clicking its icon. The contents of that database are displayed in the right pane, as shown in Figure 7.2.



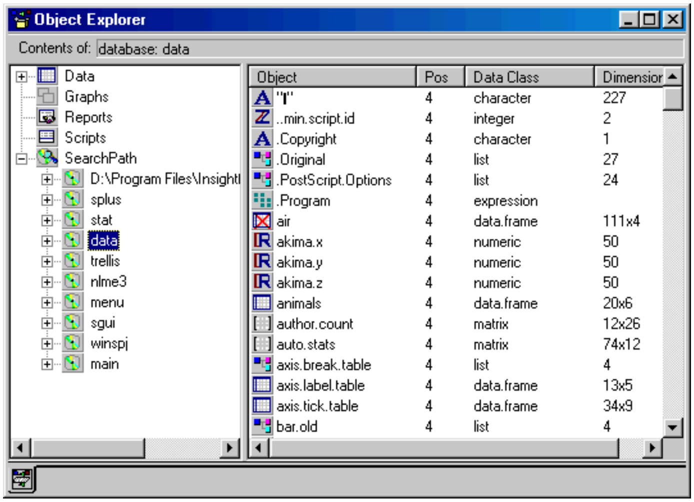
Contents of: database: data

Object	Pos	Data Class	Dimensior
"I"	4	character	227
..min.script.id	4	integer	2
.Copyright	4	character	1
.Original	4	list	27
.PostScript.Options	4	list	24
.Program	4	expression	
air	4	data.frame	111x4
akima.x	4	numeric	50
akima.y	4	numeric	50
akima.z	4	numeric	50
animals	4	data.frame	20x6
author.count	4	matrix	12x26
auto.stats	4	matrix	74x12
axis.break.table	4	list	4

Figure 7.2: *Displaying the contents of a database in the right pane.*

When you request an object (for example, by using the **Select Data** dialog), Spotfire S+ first searches the working data for an object of that name because it is the first database in the search path. If Spotfire S+ cannot find the object in your working data, it next searches the database in position two, and so on. What this means is that if you create an object with the same name as a built-in S-PLUS object stored in a system database, your object will "mask" the system object until you delete or rename it.

When you have the **Object Explorer** set to display object details in the right pane (see page 391) that include more than just the data class and search path position, an object that is masked by another object existing earlier in the search path will be displayed with a red "X" painted through its icon. For example, if you create a new data set named `air`, it is automatically stored in the working data, which occupies position one in the search path. However, there is a built-in-data object named air that is stored in the **data** database in position four of the search path. Therefore, your data object `air` will mask the system data object of the same name, and the system data object `air` will show a red "X" painted through its icon, as shown in Figure 7.3.



Contents of: database: data

- Data
- Graphs
- Reports
- Scripts
- SearchPath
  - D:\Program Files\Insightf
  - splus
  - stat
  - data
  - trellis
  - nlme3
  - menu
  - sgui
  - winspj
  - main

Object	Pos	Data Class	Dimensior
"I"	4	character	227
..min.script.id	4	integer	2
.Copyright	4	character	1
.Original	4	list	27
.PostScript.Options	4	list	24
.Program	4	expression	
air	4	data.frame	111x4
akima.x	4	numeric	50
akima.y	4	numeric	50
akima.z	4	numeric	50
animals	4	data.frame	20x6
author.count	4	matrix	12x26
auto.stats	4	matrix	74x12
axis.break.table	4	list	4
axis.label.table	4	data.frame	13x5
axis.tick.table	4	data.frame	34x9
bar.old	4	list	4

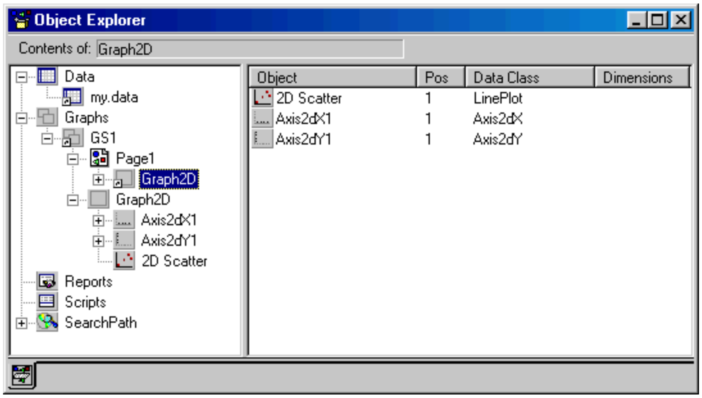
Figure 7.3: *A red "X" painted through an object's icon indicates it is being masked.*

Note also that objects stored in databases other than the working data are, for all practical purposes, read only. While you can modify any object stored in any database in the search path, the modified version of the object will be saved in the working data; the original object remains unchanged in its original location.

INTRODUCING THE OBJECT EXPLORER

The **Object Explorer** is the simple but powerful interface both for manipulating and for visually organizing your S-PLUS objects.

As shown in the example in Figure 7.4, the **Object Explorer** window is split into two panes that provide different views of objects, their components, and attributes.



Contents of: Graph2D

Object	Pos	Data Class	Dimensions
2D Scatter	1	LinePlot	
Axis2dX1	1	Axis2dX	
Axis2dY1	1	Axis2dY	

Figure 7.4: *The **Object Explorer** window.*

The left pane of the **Object Explorer** represents a single **Explorer Page**. The **Object Explorer** can contain any number of **Explorer Pages**, each represented by a tab in the lower left-hand corner of the window. Each **Explorer Page**, in turn, can contain any number of folders, which themselves are used to contain references, or *shortcuts*, to objects of various types.

Note
Unlike in Windows Explorer, **Object Explorer** folders do not reflect the locations where your objects are actually stored. Rather, folders display shortcuts to objects, giving you a way to *visually* organize them.

To open the **Object Explorer**, click the **Object Explorer** button on the **Standard** toolbar. To close the **Object Explorer**, simply click the button again.

The Object Explorer Toolbar

When you open the **Object Explorer** window, the **Object Explorer** toolbar is automatically displayed, as shown in Figure 7.5. The toolbar provides buttons for quickly performing many common tasks, as well as buttons for changing the right-pane display.

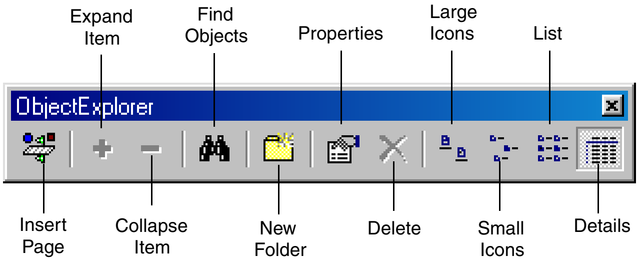


Figure 7.5: *The **Object Explorer** toolbar.*

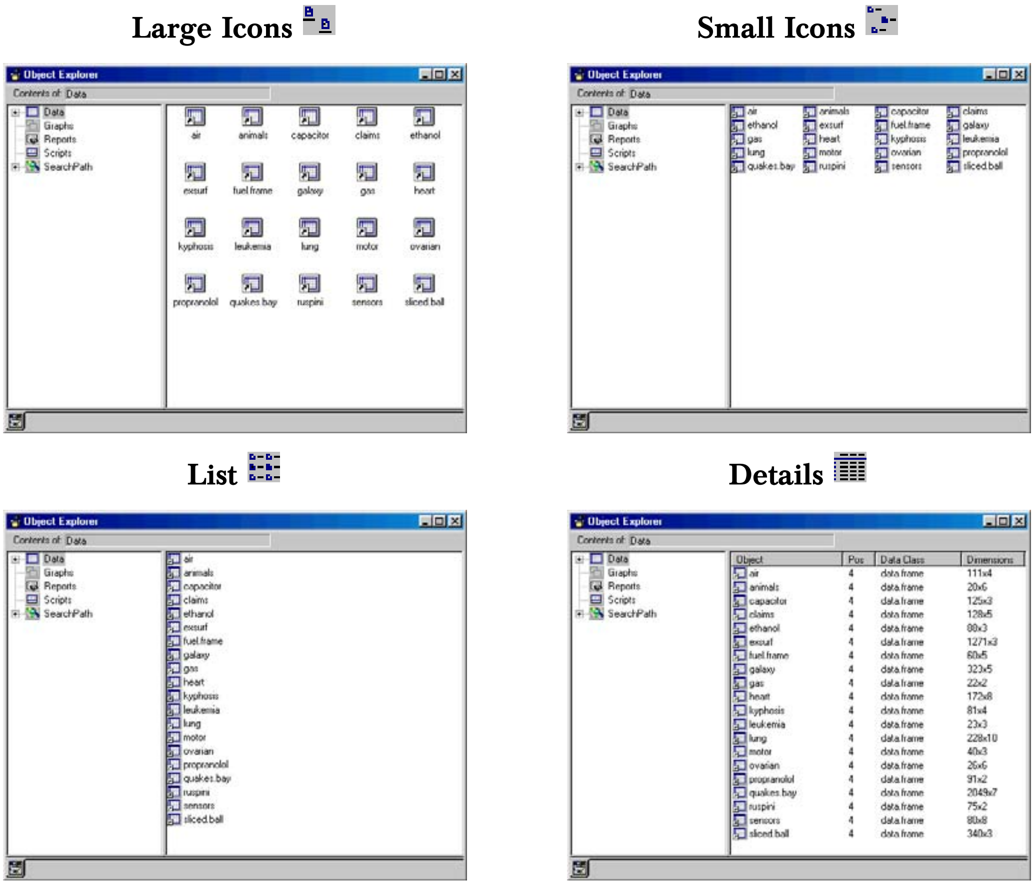
The Left Pane and Right Pane Displays

As you can see in Figure 7.4, the left pane of the **Object Explorer** maps out folders and objects in a hierarchical display. By expanding a folder or an object, you can "drill down" to any level of detail to view its underlying structure.

To expand or collapse a folder or an object, do one of the following:

- Click the plus or minus symbol to the left of the folder or object icon.
- Select the folder or object and click the **Expand Item** button ➕ or the **Collapse Item** button ➖ on the **Object Explorer** toolbar.
- Select the folder or object and choose **View ▶ Expand Selected** or **View ▶ Collapse Selected** from the main menu.

When you select an object in the left pane of the **Object Explorer**, the right pane displays its immediate components. You can choose from among four right-pane views, as shown in Figure 7.6, by clicking the corresponding button on the **Object Explorer** toolbar.



Large Icons

Small Icons

List

Details

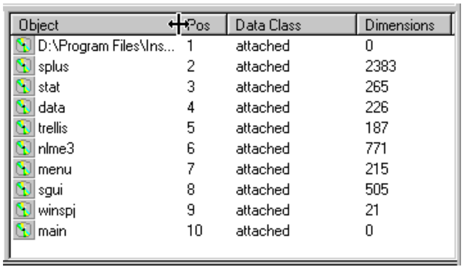
Object	Pos	Data Class	Dimensions
air	4	data.frame	111x4
animals	4	data.frame	20x6
capacitor	4	data.frame	125x3
claims	4	data.frame	128x5
ethanol	4	data.frame	88x3
exsurf	4	data.frame	1271x3
fuel.frame	4	data.frame	60x5
galaxy	4	data.frame	323x5
gas	4	data.frame	22x2
heart	4	data.frame	172x8
kyphosis	4	data.frame	81x4
leukemia	4	data.frame	23x3
lung	4	data.frame	228x10
motor	4	data.frame	40x3
ovarian	4	data.frame	26x6
propranolol	4	data.frame	91x2
quakes.bay	4	data.frame	2049x7
ruspini	4	data.frame	75x2
sensors	4	data.frame	80x8
sliced.ball	4	data.frame	340x3

Figure 7.6: *Optional views in the right pane of the **Object Explorer**.*

If the name of an object is truncated in the right pane display, simply pause your cursor over it to display a ToolTip containing the full text. ToolTips are displayed in both panes of the **Object Explorer** for any object that cannot be fully displayed at the current column or pane width.

In addition, you can resize any column in the right pane of the **Object Explorer** by doing the following:

1. Position your cursor on the vertical line to the right of the column heading you want to resize. The cursor changes to a resize tool.



Object	Pos	Data Class	Dimensions
D:\Program Files\Ins...	1	attached	0
splus	2	attached	2383
stat	3	attached	265
data	4	attached	226
trellis	5	attached	187
nlme3	6	attached	771
menu	7	attached	215
sgui	8	attached	505
winspj	9	attached	21
main	10	attached	0

2. Do one of the following:
   - Double-click to automatically widen the column to the width of its longest entry.
   - Drag the resize tool to the right to increase the column width (or to the left to decrease the width).

To sort any column of information displayed in the right pane, simply click the column's header.

Inserting and Deleting Explorer Pages

As noted earlier, you can add any number of **Explorer Pages** to the **Object Explorer**. To access a specific page, simply click its tab in the lower left-hand corner of the **Object Explorer** window.

To insert an **Explorer Page**, do one of the following:

- Click the **Insert Page** button on the **Object Explorer** toolbar.
- From the main menu, choose **Insert ▶ Explorer Page**.
- Right-click in the white space of either pane of the **Object Explorer** and select **Create Explorer Page** from the shortcut menu.

Doing any of the foregoing opens the **Explorer Page** dialog. You can use this dialog to format your **Explorer Pages**, as discussed on page 393, or click **OK** to accept the defaults and insert the page.

To delete an **Explorer Page**, first click its tab and then do one of the following:

- With no objects selected in the left pane, click the **Delete** button ✕ on the **Object Explorer** toolbar.
- Right-click in the white space of the left pane of the **Object Explorer** and select **Delete Explorer Page** from the shortcut menu.

Inserting and Deleting Folders

By populating your **Explorer Pages** with folders and tailoring each folder's filtering parameters, you can organize and display objects of particular interest to you. Because filtering is such an important tool, we devote a separate section to it later in the chapter–see Filtering on Objects on page 397.

To insert a folder, do one of the following:

- With no objects selected in the left pane, click the **New Folder** button 📁 on the **Object Explorer** toolbar or choose **Insert ▶ Folder** from the main menu.
- Right-click in the white space of the left pane of the **Object Explorer** and select **Insert Folder** from the shortcut menu.

To insert a folder into an existing folder, do one of the following:

- Select the folder into which you want to insert a new folder and then click the **New Folder** button 📁 on the **Object Explorer** toolbar or choose **Insert ▶ Folder** from the main menu.
- Right-click the icon of the folder into which you want to insert a new folder and select **Insert Folder** from the shortcut menu.

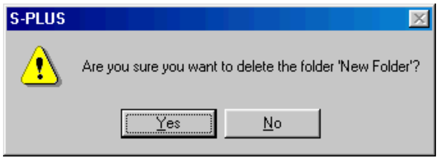
Doing either of the foregoing inserts a new folder with the default name **Folder*x*** (where *x* is a sequential number).

To delete a folder, do one of the following:

- Select the folder and press DELETE.
- Select the folder and click the **Delete** button ✕ on the **Object Explorer** toolbar.

- Right-click the folder's icon and select **Delete** from the shortcut menu.

As a safeguard, Spotfire S+ prompts you to confirm the action. Click **Yes** to delete the folder.



Are you sure you want to delete the folder 'New Folder'?

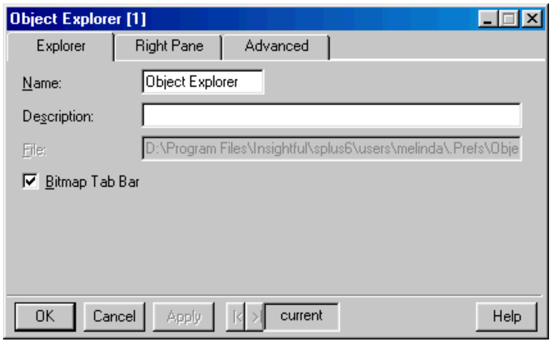
Customizing the Object Explorer

The **Object Explorer** is a fully customizable interface. To set your preferences, open the **Object Explorer** dialog by doing one of the following:

- From the main menu, choose **Format ▶ Object Explorer**.
- Double-click in the white space of the right pane of the **Object Explorer**.
- Right-click in the white space of the right pane of the **Object Explorer** and select **Explorer** from the shortcut menu.

Explorer page

Doing any of the foregoing opens the **Object Explorer** dialog with the **Explorer** page in focus, as shown in Figure 7.7.



Name: Object Explorer

Description:

File: D:\Program Files\Insightful\splus6\users\melinda\.Prefs\Obje

☑ Bitmap Tab Bar

Figure 7.7: *The **Explorer** page of the **Object Explorer** dialog.*

Name As with other document objects, the name of the **Object Explorer** is the name of the file in which it is archived. If you want to rename the **Object Explorer**, for example, to save it in a file, you can type a new name in this field.

Note

When you click the **Object Explorer** button on the **Standard** toolbar, Spotfire S+ looks in the **.Prefs** folder of your Spotfire S+ project folder for a file named **Object Explorer.sbf**. In general, therefore, we advise not changing the name.

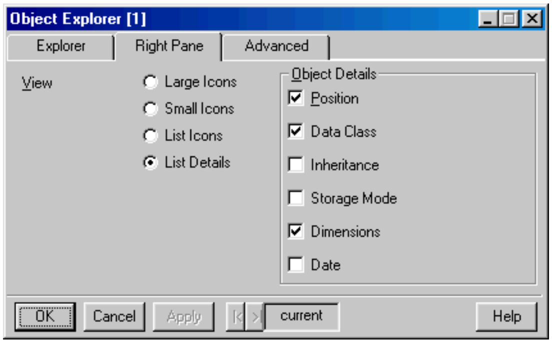
Description Enter a description for the **Object Explorer**, if desired.

File The pathname of the file is displayed if the **Object Explorer** has been saved to a file.

Bitmap Tab Bar When selected, bitmap images are displayed on the tabs for **Explorer Pages** in the lower left-hand corner of the **Object Explorer** window. Clear the check box to label the tabs with the names of the **Explorer Pages** instead. (See page 394 for instructions on how to specify bitmaps and names for **Explorer Pages**.)

Right Pane page

The **Right Pane** page of the **Object Explorer** dialog is shown in Figure 7.8.

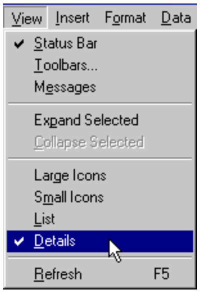


View
○ Large Icons
○ Small Icons
○ List Icons
● List Details

Object Details
☑ Position
☑ Data Class
☐ Inheritance
☐ Storage Mode
☑ Dimensions
☐ Date

Figure 7.8: *The* ***Right Pane*** *page of the* ***Object Explorer*** *dialog.*

View Click one of the radio buttons to select your preferred right-pane display (refer to Figure 7.6). You can also change the view in the right pane by clicking a button on the **Object Explorer** toolbar or by choosing **View** from the main menu and selecting the desired view.



Right Pane page, Object Details group

If you select **List Details** for your right-pane display, this group of options is enabled. Here, you can choose the type of detail you want to view. For each check box you select, a column of information is displayed in the right pane.

Listed below is a brief description of each option. For more information, see the *Programmer's Guide*.

Position Depends on what types of objects are listed in the column. For an engine object, **Pos** shows the position in the search path of the database where the object is stored. For an element of a list or data frame, **Pos** displays its position within the parent object. For a toolbar button or menu item, **Pos** shows its relative position on the toolbar or menu, respectively.

Data Class The class of a data object, such as `data.frame`, `design`, or `lm`.

Inheritance Refers to the data class of an object and any classes from which it inherits.

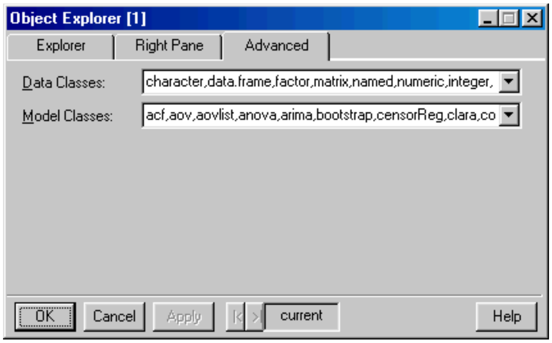
Storage Mode The mode of a data object.

Dimensions The dimensions of an object–in the case of a vector, its length; for a data frame or matrix, the numbers of rows and columns.

Date The date an object was last modified.

Advanced page

The **Advanced** page of the **Object Explorer** dialog is shown in Figure 7.9.



Data Classes: character,data.frame,factor,matrix,named,numeric,integer,

Model Classes: acf,aov,aovlist,anova,arima,bootstrap,censorReg,clara,co

Figure 7.9: *The **Advanced** page of the **Object Explorer** dialog.*

Data Classes Specify which classes of engine objects you want Spotfire S+ to define as data objects.

Model Classes Specify which classes of engine objects you want Spotfire S+ to define as model objects.

Default definitions are provided for both data classes and model classes, but you can modify these definitions to suit your needs. When filtering on database objects, Spotfire S+ uses these definitions to determine what objects to display in a folder.

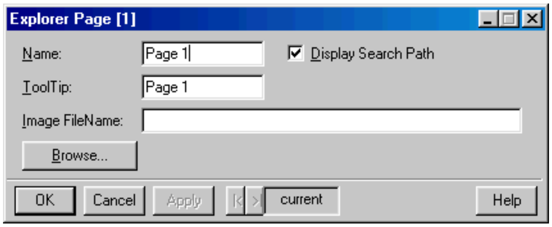
For a complete discussion of the important filtering mechanism of folders, see Filtering on Objects on page 397.

Formatting Explorer Pages

You can use the **Explorer Page** dialog to format your **Explorer Pages**. The dialog is displayed automatically when you insert a new **Explorer Page** (see page 388). To open the dialog for an existing **Explorer Page**, first click its tab and then do one of the following:

- From the main menu, choose **Format ▶ Explorer Page**.
- Double-click in the white space of the left pane of the **Object Explorer**.
- Right-click in the white space of the left pane of the **Object Explorer** and select **Properties** from the shortcut menu.

Doing any of the foregoing opens the **Explorer Page** dialog, as shown in Figure 7.10.



Explorer Page [1]

Name: Page 1

ToolTip: Page 1

Image FileName:

☑ Display Search Path

Figure 7.10: *The **Explorer Page** dialog.*

Name By default, a new **Explorer Page** is named **Page *x*** (where *x* is a sequential number). If you prefer, you can enter a new name in this field. Names are displayed on **Explorer Page** tabs if the **Object Explorer** is set to display names rather than bitmaps or icons. For more information on this option, see page 391.

ToolTip If you pause your mouse cursor over an **Explorer Page** tab, Spotfire S+ displays a ToolTip for that page. By default, the ToolTip text is the name of the page, but if you prefer, you can specify a different ToolTip.

Image FileName If the **Object Explorer** is set to display bitmaps or icons on **Explorer Page** tabs (see page 391), specify the complete file name and path of the bitmap file or icon you want to use. To navigate to the file, click **Browse**. If no file is specified, Spotfire S+ uses a default image.

Display Search Path When selected, a `SearchPath` object is automatically inserted in the **Explorer Page**.

Setting Your Preferred Defaults

When you click the **Object Explorer** button on the **Standard** toolbar, the *default* **Object Explorer** is opened. After customizing the **Object Explorer**, you can save your changes as the new default by doing one of the following:

- With the **Object Explorer** in focus and no objects selected in either pane, choose **Options ► Save Window Size/ Properties as Default** from the main menu.
- Right-click in the white space of the right pane of the **Object Explorer** and select **Save Object Explorer as default** from the shortcut menu.

- Right-click in the white space of the right pane of the **Object Explorer** and select **Save** from the shortcut menu.
- From the main menu, choose **File ▶ Save**.
- Click the close button ☒ in the upper right-hand corner of the **Object Explorer** window. When Spotfire S+ prompts you to save the **Object Explorer** in a file, click **Yes**.

You can also customize a new **Object Explorer** that you created and save it as your new default; simply use the first or second method above.

Note

The **Object Explorer** is a document object, and the name of a document object is the name of the file in which it is saved. Because Spotfire S+ looks for a file named **Object Explorer.sbf** (found in the **.Prefs** folder of your Spotfire S+ project folder) to use as the default, you cannot rename the **Object Explorer** and use your renamed version as the default.

Opening the Object Explorer at Startup

If you want to have Spotfire S+ automatically open the default **Object Explorer** at startup, do the following:

1. From the main menu, choose **Options ▶ General Settings**.
2. Click the **Startup** tab in the **General Settings** dialog.
3. In the **Open at Startup** group, select the **Object Explorer** check box and click **OK**.

WORKING WITH OBJECTS

As we stated in the introduction to this chapter, everything in S-PLUS is an object. The **Object Explorer**, as its name implies, gives you a way to explore the structure of your S-PLUS objects. The **Object Explorer** is also a handy tool for finding objects stored in databases and for organizing your objects by using the filtering mechanism of your **Explorer Page** folders. In addition, you can use the **Object Explorer** to create, select, view, edit, copy, move, and delete objects and object shortcuts.

Finding Objects

The **Find Objects** dialog is a powerful searching tool for finding objects stored in any database in the current search path.

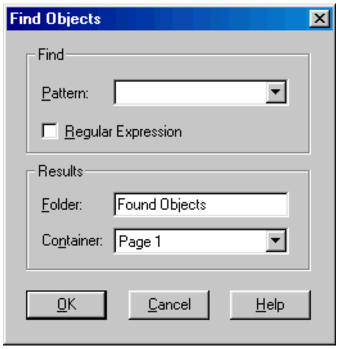
To find an object and place it in the current folder, do one of the following:

- Click the folder's icon to select it and then click the **Find Objects** button on the **Object Explorer** toolbar or choose **Edit ▶ Find** from the main menu.
- Right-click the folder's icon and select **Find** from the shortcut menu.

To find an object and place it in a new folder named **Found Objects**, do one of the following:

- With no objects selected in the left pane, click the **Find Objects** button on the **Object Explorer** toolbar or choose **Edit ▶ Find** from the main menu.
- Right-click in the white space of the left pane of the **Object Explorer** and select **Find** from the shortcut menu.

The **Pattern** field of the **Find Objects** dialog (shown in Figure 7.11) takes as input a pattern. Wildcards are acceptable, and regular expressions can also be used. Patterns from previous searches are saved and can be selected from the dropdown list.



Pattern:

□ Regular Expression

Folder: Found Objects

Container: Page 1

Figure 7.11: *The **Find Objects** dialog.*

Spotfire S+ searches all the attached databases in the search path and places shortcuts to all matching objects in the folder specified in the **Folder** field. The **Container** field reflects the name of the **Explorer Page** containing the results folder.

Note

The **Find Objects** feature only searches for interface objects and objects in attached databases. If the database in which an object is stored is not in the search path, the object will not be found.

Filtering on Objects

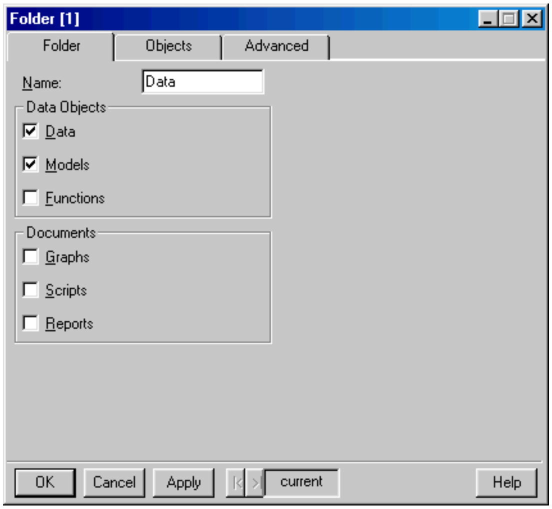
By using the unique *filtering* mechanism provided by folders, you can restrict the types of objects displayed in a folder to those of particular interest. In addition, organizing your objects with folders makes it easier, for example, to perform a data analysis or statistical model-building task.

To set the filtering properties of a folder, do one of the following:

- Click the folder's icon to select the folder and then click the **Properties** button on the **Object Explorer** toolbar.
- Click the folder's icon to select the folder and then choose **Format ▶ Selected Folder** from the main menu.
- Right-click the folder's icon and select **Folder** from the shortcut menu.

Folder page

Doing any of the foregoing opens the **Folder** dialog with the **Folder** page in focus, as shown in Figure 7.12. The **Folder** page allows you to set a very general level of filtering.



Name: Data

Data Objects
☑ Data
☑ Models
☐ Functions

Documents
☐ Graphs
☐ Scripts
☐ Reports

Figure 7.12: *The **Folder** page of the **Folder** dialog.*

Name The name of the folder. To change the folder's name, type a new name in this field.

Folder page, Data Objects group

The **Data Objects** group is for filtering on engine objects stored in the database(s) you select on the **Advanced** page of the dialog (see page 401).

Data If selected, the folder filters on data objects. Most of the data objects you will be interested in are data frames (objects of type `data.frame`) and sometimes matrices (`matrix`) and vectors (`vector`). In general, data objects are, or are derived from, one of these classes of objects.

Models If selected, the folder filters on model objects. Most of the model objects you will be interested in are derived from lists and structures (objects of class `list` and `structure`, respectively).

Note

You can use the **Advanced** page of the **Object Explorer** dialog to explicitly specify what you want Spotfire S+ to define as data and model objects. See page 393 for details.

Functions If selected, the folder filters on function objects. By selecting your working data as the database to filter, you can display functions you have written in the S-PLUS language or those you have created by modifying the built-in functions.

Folder page, Documents group

The **Documents** group is for filtering on **Graphs**, **Scripts**, and **Reports** currently open in your session (document objects are not stored in databases). Select any or all of these check boxes, as desired.

Objects page

The **Objects** page of the **Folder** dialog, shown in Figure 7.13, lists the objects that are exceptions to the folder's filtering properties.

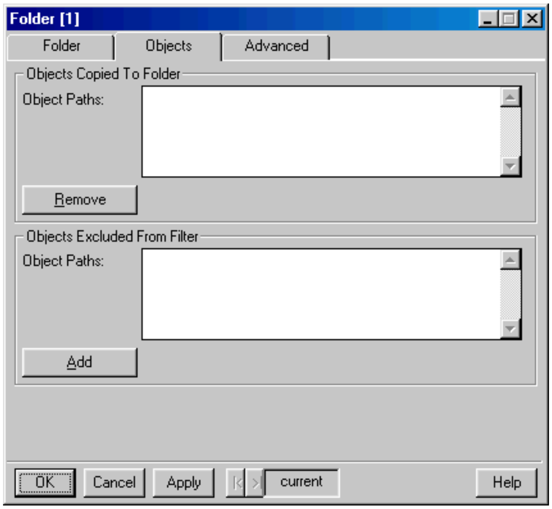


Figure 7.13: *The **Objects** page of the **Folder** dialog.*

Objects page, Objects Copied To Folder group

Object Paths This text box displays references to objects not matching the folder's filtering properties but whose shortcuts you placed in the folder. To remove one of these object shortcuts from the folder, select it and click **Remove**.

Note

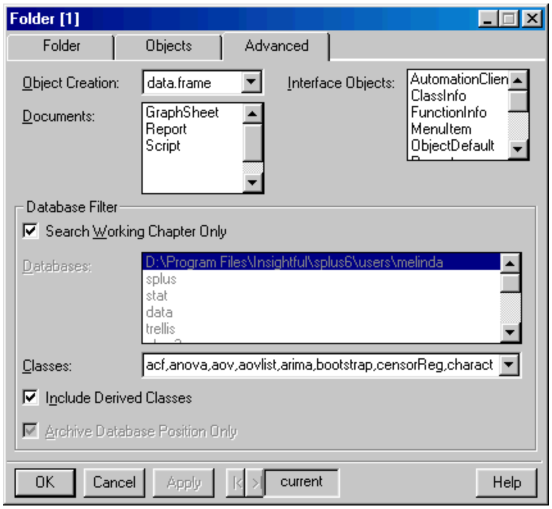
Clicking **Remove** only removes the object's shortcut from the folder; it does not delete the object itself.

Objects page, Objects Excluded From Filter group

Object Paths This text box displays references to objects matching the folder's filtering properties but whose shortcuts you removed from the folder. To add one of these object shortcuts back into the folder, select it and click **Add**.

Advanced page

The **Advanced** page of the **Folder** dialog, shown in Figure 7.14, allows you to refine your filtering criteria.



Object Creation: data.frame

Documents: GraphSheet
Report
Script

Interface Objects: AutomationClien
ClassInfo
FunctionInfo
MenuItem
ObjectDefault

Database Filter

☑ Search Working Chapter Only

Databases: D:\Program Files\Insightful\splus6\users\melinda
splus
stat
data
trellis

Classes: acf,anova,aov,aovlist,arima,bootstrap,censorReg,charact

☑ Include Derived Classes

☑ Archive Database Position Only

Figure 7.14: *The **Advanced** page of the **Folder** dialog.*

Object Creation Select a default class for objects to be created in the folder. Note that selecting a default class here does not restrict you to creating only that class of objects in the folder; it merely provides a handy menu selection on the folder's shortcut menu. When you create an object that does not match the classes of object the folder is filtering on, a reference to it is placed in the **Objects Copied To Folder** box on the **Objects** page of the dialog.

Documents Select the classes of document objects you want to include in the folder.

Interface Objects Select the classes of interface objects you want to include in the folder.

Advanced page, Database Filter group

Search Working Chapter Only If selected, Spotfire S+ filters only the working data and no other databases in the search path. To filter other databases, first clear this check box and then select the databases to filter in the **Databases** field.

Databases Select the databases you want Spotfire S+ to search from among the databases currently in the search path. Only the objects that are found in these databases are displayed in the folder.

Classes Select the classes of objects to display in the folder. In this field, your selections appear as a comma-delimited list. (The selections you make in the **Data Objects** group of the **Folder** page will modify the contents of this field.) To include all objects classes, select the special key word (**All**).

Include Derived Classes If selected, objects that are derived from the classes you specify in the **Classes** field are included. For example, a `design` object is derived from a `data.frame` object. If you select this option and the folder is set to filter on `data.frame` objects, `design` objects are also displayed.

Archive Database Position Only Because database paths can be specific to a particular machine, select this option if you want to be able to share your **Object Explorer** files. If this option is not selected, the paths to the databases that the folder is filtering are archived. In this case, when the database paths are being read from file and a path exists but is not currently in the search path, the user is prompted to attach the database.

Setting Your Preferred Defaults

After customizing a folder's filtering properties, you can save your changes as the new folder default by doing one of the following:

- Click the folder's icon to select it and choose **Options ▶ Save Folder as Default** from the main menu.
- Right-click the folder's icon and select **Save Folder as default** from the shortcut menu.

Manipulating Objects

The **Object Explorer** often provides the most convenient way to manipulate some types of objects. You can use the **Object Explorer** to create, select, view, edit, copy, move, and delete objects and object shortcuts.

Creating Objects

The shortcut menu for each folder in an **Explorer Page** provides options for creating both objects and other folders. If you specify a default class for object creation in a folder, as discussed on page 401, an additional menu selection appears for creating this type of object. When you create an object, a shortcut to the object is placed in the folder while the object itself is always stored in your working data.

To create an object, do the following:

1. Right-click the folder's icon and select **Insert** from the shortcut menu. The **Create Object** dialog opens, as shown in Figure 7.15.

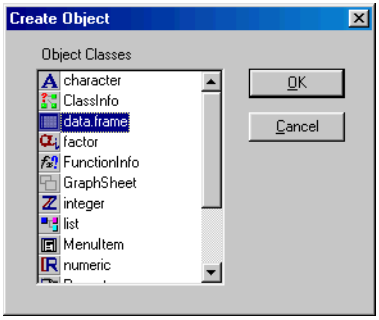


Figure 7.15: *The **Create Object** dialog.*

2. Select the type of object you want to create and click **OK**.

Note

Because the working data is the first database in the search path, if you create an object with the same name as an S-PLUS system object, your object will “mask” the system object. An object that is masked by another object of the same name earlier in the search path is displayed with a red “X” over its icon. To eliminate the conflict, simply rename the masking object.

Selecting Objects

Selecting an object in the **Object Explorer** is easy–simply click its icon. The **Object Explorer** is especially useful for selecting objects that are difficult to select in other views, such as overlaid graphical elements in a **Graph Sheet**.

When you select graph element objects in the right pane of the **Object Explorer**, they are also selected in the **Graph Sheet** in which they reside. Similarly, if a data set is open in a **Data** window, selecting columns in the right pane also selects them in the **Data** window. By selecting your columns in the right pane, you can then graph them using the plot palettes.

Viewing and Editing Objects

Double-clicking objects of different classes yields different behavior in the **Object Explorer**. For example, double-clicking an object of class `data.frame` or `matrix` launches the **Data** window while double-clicking an object of class `lm` (an object constructed by the `lm` function) displays a summary of the object in a **Report** window.

Note

Only certain column objects of class `numeric`, `integer`, `character`, `logical`, `single`, `complex`, `factor`, and `timeDate` may be opened for editing in a **Data** window. Attempting to open objects of certain other classes in a **Data** window causes Spotfire S+ to issue a warning that the object will be opened in read-only mode. (In read-only mode, columns in the **Data** window are slightly shaded.)

To convert such an object into an editable data frame, first open it in read-only mode and then convert it to a data frame by clicking the **Convert to Data Frame** button on the **Data** window toolbar or choosing **Data ▶ Convert to Data Frame** from the main menu.

You can also launch the **Data** window for objects such as data frames and matrices by right-clicking the object and selecting **Edit** from the shortcut menu. To edit other types of objects, use the object's properties dialog. You can open the dialog by right-clicking the object and selecting **Properties** from the shortcut menu. For properties dialogs containing multiple pages, select the page's name from the shortcut menu. Note that any changes you make through the **Object Explorer** are reflected immediately in the object.

Copying and Moving Objects

You can copy and move object shortcuts using CTRL-C and CTRL-V or by selecting the **Cut**, **Copy** and **Paste** commands on the **Edit** or shortcut menu. You can also drag and drop objects between folders.

Hint

When you drag and drop an object within the **Object Explorer** window, the object is moved; to copy the object, press CTRL while dragging.

In general, you can drag and drop just about any S-PLUS object onto any other object and get results. For example:

- Dropping a data object onto a graph changes the data used in the graph.
- Dropping any object onto a **Script** window creates a script that, when run, recreates the object.
- Dropping an object onto a **Report** window produces a summary of the object.
- Dropping a folder or an **Explorer Page** onto a toolbar creates a toolbar button for recreating the folder or **Explorer Page**, respectively.

Deleting Objects and Object Shortcuts

Deleting objects through the **Object Explorer** is particularly useful for deleting multiple objects. For example, if you want to delete all the arrows on a plot, it is much easier to select them in the **Object Explorer** than to select them directly on the graph. It's also easy to delete columns from a data frame. Just select the columns you want to delete in the right pane and press DELETE.

To delete an object from your working data, do one of the following:

- Select the object and press DELETE.

- Select the object and click the **Delete** button ✕ on the **Object Explorer** toolbar.
- Select the object and choose **Edit ▶ Clear** from the main menu.
- Right-click the object and select **Delete** from the shortcut menu.

To delete an object shortcut, do one of the following:

- Select the object and press CTRL-DELETE.
- Select the object and choose **Edit ▶ Delete Short Cut** from the main menu.
- Right-click the object and select **Delete Short Cut** from the shortcut menu.

Note

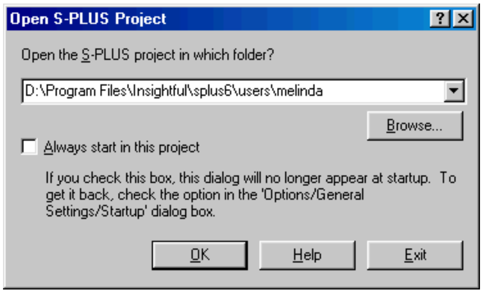
You can delete objects from your working data, but you cannot delete objects stored in system databases. For system objects, only the **Delete Short Cut** selection is available on the shortcut menu.

ORGANIZING YOUR WORK

If you work on several different projects simultaneously, you may find it convenient to keep the data and results of each project separate. Spotfire S+ project folders and chapters give you a way to do that, making it easy to organize your work.

Using Project Folders

You can tell Spotfire S+ to display the dialog shown in Figure 7.16 each time you start the program.



Open S-PLUS Project

Open the S-PLUS project in which folder?

D:\Program Files\Insightful\splus6\users\melinda

□ Always start in this project

If you check this box, this dialog will no longer appear at startup. To get it back, check the option in the 'Options/General Settings/Startup' dialog box.

Figure 7.16: *The* ***Open Spotfire S+ Project*** *dialog.*

If you set this behavior as the default, Spotfire S+ will ask you to specify the *project folder* you want to use for the upcoming session each time you start the program. A Spotfire S+ project folder is the central Windows folder for storing the data and documents you create and modify during a session.

When you specify a Windows folder as a Spotfire S+ project folder, Spotfire S+ automatically creates two important subfolders within it:

- A **.Data** folder, which corresponds to the working data for that particular project
- A **.Prefs** folder in which Spotfire S+ saves your preferences (for example, the selections you make in the **General Settings** dialog) and customizations (for example, when you save a new default **Object Explorer**)

In addition, the project folder becomes the default folder for saving the document objects, such as **Graph Sheets**, reports, and scripts, that you must manually save in files in order to permanently store. Because each project folder has its own **.Data** and **.Prefs** folders and is the default folder for saving your document objects, project folders provide a handy way to organize the work you do in Spotfire S+. By making creative use of multiple project folders, you can structure your work into distinct projects, keeping the data and documents for each project separate.

Specifying a Project Folder

If you choose (see Chapter 11, Customizing Your Spotfire S+ Session), the **Open Spotfire S+ Project** dialog will appear each time you start the program, giving you the opportunity to specify which project folder you want to use for the upcoming session.

Note

If you decide to use the same project folder each time you start Spotfire S+, you can turn off the dialog prompt by selecting the **Always start in this project** check box in the dialog. To turn off the dialog prompt from within Spotfire S+, choose **Options ▶ General Settings** from the main menu, click the **Startup** tab, and clear the **Prompt for project folder** check box.

To specify your project folder, do one of the following and then click **OK** in the dialog:

- Accept the default project folder. The very first time you start Spotfire S+, this is the system default located in the **users** folder of the Spotfire S+ program folder. Thereafter, the default is the project folder you used for the previous session.
- Specify an existing project folder by typing its pathname in the text box or clicking **Browse** and navigating to it.
- Create a new project folder by typing a pathname in the text box.

Note

For a folder to be used as a Spotfire S+ project folder, it must contain a **.Data** folder and a **.Prefs** folder. When you create a new project folder using the **Open Spotfire S+ Project** dialog, these folders are created for you automatically.

Working With Chapters

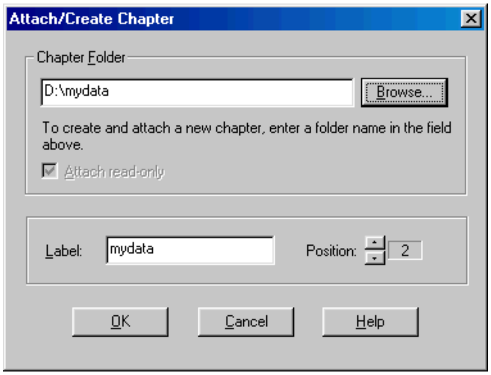
In Spotfire S+, databases are associated with *chapters.* Each *chapter folder* contains its own **.Data** folder for holding the database objects. In addition to the working data (**.Data** folder) associated with a particular project folder, you may have other databases that you would like to access during a session. To access the objects contained in a database, simply attach the database by attaching its chapter.

Attaching a Chapter

To attach a chapter, or to simultaneously create and attach a new chapter, open the **Attach/Create Chapter** dialog by doing one of the following:

- In the left pane of the **Object Explorer**, right-click the `SearchPath` object's icon or a database icon and select **Attach/Create Chapter** from the shortcut menu.
- From the main menu, choose **File** ▶ **Chapters** ▶ **Attach/ Create Chapter**.

The **Attach/Create Chapter** dialog opens, as shown in Figure 7.17.



Attach/Create Chapter

Chapter Folder: D:\mydata

To create and attach a new chapter, enter a folder name in the field above.

☑ Attach read-only

Label: mydata

Position: 2

Figure 7.17: *The **Attach/Create Chapter** dialog.*

1. In the **Chapter Folder** text box, do one of the following:
   - To attach an existing chapter, type the pathname of the chapter folder containing the desired **.Data** folder or click **Browse** and navigate to it.
   - To create and attach a new chapter (that is, a new **.Data** folder within a new chapter folder), type the pathname of a new chapter folder. At the confirmation prompt, click **OK**.
2. To attach the chapter as read-only, select the **Attach read-only** check box.

3. In the **Label** text box, specify a label to use to identify the chapter. This is the name that will appear in the left pane of the **Object Explorer** under **SearchPath**.

4. Click the ▲▼ buttons in the **Position** field to select the search path position in which to attach the chapter. To use the chapter as your working data, set **Position** to **1**.

Important Note

The chapter attached in position one of the search path must be a read-write chapter. Typically, this database is the working data associated with the current project folder.

Note that, as presently implemented, Spotfire S+ does not “remember” the databases you attached in an earlier session when starting the program at a later time. Only the working data associated with a particular project folder and the Spotfire S+ system databases are reinstated in the search path. (To establish a search path for a particular project, create a `.First` function. For details, see Customizing Your Session at Startup and Closing on page 550.)

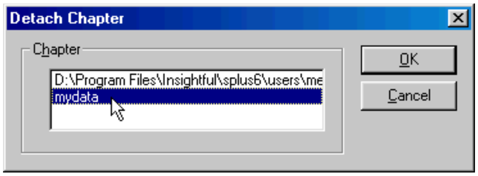
5. Click **OK**.

Detaching a Chapter

When you are finished working with a particular chapter, simply detach it by doing one of the following:

- In the right pane of the **Object Explorer**, right-click the icon of the chapter you want to detach and select **Detach Database** from the shortcut menu. At the confirmation prompt, click **OK**.

- From the main menu, choose **File** ▶ **Chapters** ▶ **Detach Chapter**. In the **Detach Chapter** dialog (see Figure 7.18), select the database you want to detach and click **OK**.



Chapter: D:\Program Files\Insightful\splus6\users\me

mydata

Figure 7.18: *The **Detach Chapter** dialog.*

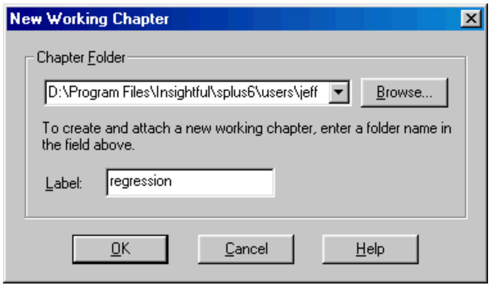
Note
Spotfire S+ prohibits you from detaching any of the system databases.

Selecting a New Working Chapter

To select a new working chapter in a Spotfire S+ session that is already running, open the **New Working Chapter** dialog by doing the following:

- From the main menu, choose **File** ▶ **Chapters** ▶ **New Working Chapter**.

The **New Working Chapter** dialog opens, as shown in Figure 7.19.



Chapter Folder: D:\Program Files\Insightful\splus6\users\jeff

To create and attach a new working chapter, enter a folder name in the field above.

Label: regression

Figure 7.19: *The **New Working Chapter** dialog.*

1. In the **Chapter Folder** text box, do one of the following:
   - To attach an existing working database, type the pathname of the chapter folder containing the desired **.Data** folder or click **Browse** and navigate to it.

- To create and attach a new working database (that is, a new **.Data** folder within a new chapter folder), type the pathname of a new chapter folder. At the confirmation prompt, click **OK**.

2. In the **Label** text box, specify a label to use to identify the database. This is the name that will appear in the **Object Explorer**.
3. Click **OK**.

Note

If another chapter is currently attached in the default position one, the old chapter is moved to position two and detached. The new working chapter is then attached in position one.

USING THE COMMANDS WINDOW

8

INTRODUCTION

S-PLUS is a rich language developed specially for exploratory data analysis and statistics. The **Commands** window is a window on the Spotfire S+ programming environment, giving you direct access to interactive programming in the powerful S-PLUS language.

Note

Throughout this chapter, we use the term “Spotfire S+” to denote the product. We use “S-PLUS” to denote the language.

In this chapter, we can only present a brief introduction to the S-PLUS language. For a thorough treatment of both the language and how to program in it, be sure to consult the *Programmer’s Guide.*

COMMANDS WINDOW BASICS

To open the **Commands** window, do one of the following:

- From the main menu, choose **Window** ▶ **Commands Window**.
- Click the **Commands Window** button on the **Standard** toolbar.

Entering Expressions

You use the **Commands** window by typing expressions at the prompt and then pressing the RETURN key. Spotfire S+ responds, typically with a *value*, although sometimes, as when creating graphics, by simply returning a new prompt in the **Commands** window while creating the graphic in a Spotfire S+ **Graph Sheet**.

Among the simplest S-PLUS expressions are arithmetic expressions, such as the following:

```
> 3+7
[1] 10
> 3*21
[1] 63
```

The symbols "+" and "*" represent S-PLUS operators for addition and multiplication, respectively. In addition to the usual arithmetic and logical operators, S-PLUS also has special operators for special purposes. For example, the colon operator (:) is used to obtain sequences:

```
> 1:7
[1] 1 2 3 4 5 6 7
```

The `[1]` in each of the output lines is the *index* of the first element in the S-PLUS return value. If S-PLUS is responding with a long vector of results, each line is preceded by the index of the first response of that line.

```
> 1:30
 [1]  1  2  3  4  5  6  7  8  9 10 11 12 13 14 15 16 17 18
[19] 19 20 21 22 23 24 25 26 27 28 29 30
```

The most common S-PLUS expression is the *function call*. An example of a *function* in S-PLUS is the `c` function, used for "combining" comma-separated lists of items into a single item. Functions calls are always followed by a pair of parentheses, with or without any *arguments* in the parentheses.

```
> c(3,4,1,6)
[1] 3 4 1 6
```

In all of our examples to this point, S-PLUS has simply returned a value, which is printed in your **Commands** window. To reuse the value of a S-PLUS expression, you must *assign* it with the `<-` operator. For example, to assign the above expression to an S-PLUS object named `newvec`, you'd type the following:

```
> newvec <- c(3, 4, 1, 6)
```

S-PLUS creates the object `newvec` and returns a prompt. To view the contents of the newly created object, just type its name:

```
> newvec
[1] 3 4 1 6
```

Basic Syntax

This section introduces basic typing syntax and conventions in Spotfire S+.

Spaces

S-PLUS ignores most spaces. For example:

```
> 3+     7
[1] 10
```

However, do not put spaces in the middle of numbers or names. Also, you should always put spaces around the two-character assignment operator `<-`; otherwise, you may perform a comparison instead of an assignment.

Uppercase and Lowercase

Unlike Windows and DOS, S-PLUS is *case sensitive*. All S-PLUS objects, arguments, names, etc. are case sensitive. You will get an error message if you do not type the name of an S-PLUS object exactly, being careful to match all uppercase and lowercase letters. For example:

```
> newvec
[1] 3 4 1 6
```

```
> NEWvec
Problem: Object "NEWvec" not found
Use traceback() to see the call stack
Dumped
```

Special Characters

Table 8.1 lists some special characters for carriage control, obtaining characters that are not represented on the keyboard, or delimiting character strings.

Table 8.1: *Special characters.*

Character	Description
`\t`	Tab
`\n`	New line
`\"`	" (double quotes)
`\'`	' (apostrophe)
`\\`	\ (backslash)
\###	ASCII character as an octal number (that is, # is in the range 0-7)

Any ASCII character may be represented as a three-digit octal number. The character can be specified in S-PLUS by preceding the octal representation with a backslash (\). So, for example, if you didn't have the vertical bar on your keyboard, you could specify it using `"\174"`. The ASCII character set with the octal representation can be found in standard programming texts.

Continuation

When you press the Return key and it is clear to Spotfire S+ that an expression is incomplete (for example, the last character is an operator or there is a missing parenthesis), Spotfire S+ provides a *continuation* prompt to remind you to complete the expression. The default continuation prompt is +.

Here are two examples of incomplete expressions that cause Spotfire S+ to respond with a continuation prompt:

```
> 3*
+ 21
[1] 63
> c(3,4,1,6
+ )
[1] 3 4 1 6
```

In the first example, Spotfire S+ determined that the expression was not complete because the multiplication operator `*` must be followed by a data object. In the second example, Spotfire S+ determined that `c(3,4,1,6` was not complete because a right parenthesis is needed.

In each of the above cases, the user completed the expression after the continuation prompt (+) and then Spotfire S+ responded with the result of the evaluation of the complete expression.

Interrupting Evaluation of an Expression

Sometimes you may want to stop the evaluation of an S-PLUS expression. For example, you may suddenly realize you want to use a different command, or the output display of data on the screen is extremely long and you don't want to look at all of it.

To interrupt Spotfire S+, simply press the ESC key.

Error Messages

Don't be afraid of making mistakes when typing commands in the **Commands** window; you will not break anything by making a mistake. Usually you get some sort of error message, after which you can try again.

Here is an example of a mistake made by typing an "improper" expression:

```
> .5(2,4)
Problem: Invalid object supplied as function
Use traceback() to see the call stack
Dumped
```

In this example, we typed something that Spotfire S+ tried to interpret as a function because of the parentheses. However, there is no function named ".5."

Quitting Spotfire S+

To quit Spotfire S+ from the **Commands** window, use the q function:

```
> q()
```

The () are required with the q command to quit Spotfire S+ because q is an S-PLUS function and parentheses are required with all S-PLUS functions.

Command Line Editing

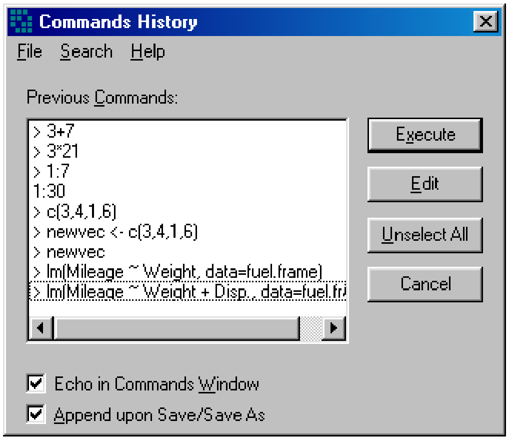
The **Commands** window allows you to recall and edit previously issued S-PLUS commands. The up and down arrows can be used to scroll backward and forward through the list of commands typed during the session. Typing errors can be easily corrected using standard Windows editing commands, and new commands can be constructed based on previously issued commands. For example, type the following expression and press ENTER:

```
> lm(Mileage ~ Weight, data=fuel.frame)
```

If you now decide that you want to add another predictor, you can press the up arrow to recall the command and then edit it to read:

```
> lm(Mileage ~ Weight + Disp., data=fuel.frame)
```

Now click the **Commands History** button on the **Standard** toolbar. The **Commands History** dialog, shown in Figure 8.1, displays a list of your previously issued commands and gives you another way to edit them. Note that you can also use the **Commands History** dialog for searching and executing your commands.



```
> 3+7
> 3*21
> 1:7
1:30
> c(3,4,1,6)
> newvec <- c(3,4,1,6)
> newvec
> lm(Mileage ~ Weight, data=fuel.frame)
> lm(Mileage ~ Weight + Disp., data=fuel.fr
```

☑ Echo in Commands Window

☑ Append upon Save/Save As

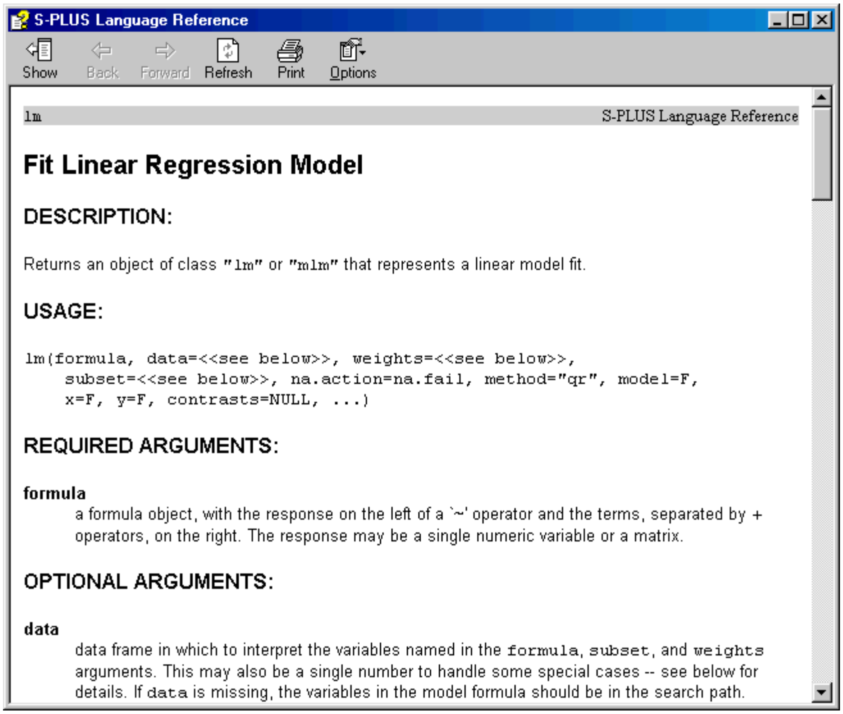
Figure 8.1: *The **Commands History** dialog.*

Getting Help in Spotfire S+

If you need help at any time during a Spotfire S+ session, you can obtain it easily with the `?` and `help` functions. The `?` function has simpler syntax–it requires no parentheses in most instances. For example:

```
> ?lm
```

opens the `lm` help file shown in Figure 8.2 below. Both `?` and `help` display help files in HTML format.



lm S-PLUS Language Reference

Fit Linear Regression Model

DESCRIPTION:

Returns an object of class `"lm"` or `"mlm"` that represents a linear model fit.

USAGE:

```
lm(formula, data=<<see below>>, weights=<<see below>>,
    subset=<<see below>>, na.action=na.fail, method="qr", model=F,
    x=F, y=F, contrasts=NULL, ...)
```

REQUIRED ARGUMENTS:

formula
a formula object, with the response on the left of a `~' operator and the terms, separated by + operators, on the right. The response may be a single numeric variable or a matrix.

OPTIONAL ARGUMENTS:

data
data frame in which to interpret the variables named in the `formula`, `subset`, and `weights` arguments. This may also be a single number to handle some special cases -- see below for details. If `data` is missing, the variables in the model formula should be in the search path.

Figure 8.2: *Help file for the* `lm` *function.*

The `?` command is particularly useful for obtaining information on classes and methods. If you use `?` with a function call, Spotfire S+ offers documentation on the function name itself and on all methods that might be used with the function if evaluated. In particular, if the function call is `methods(`*`name`*`)`, where *`name`* is a function name, Spotfire S+ offers documentation on all methods for *`name`* available in the current search list. For example:

```
> ?methods(summary)
```

```
The following are possible methods for summary
  Select any for which you want to see documentation:
1: summary()
2: summary(<Default>)
3: summary(object=groupVecVirtual)
4: summary(object=numericSequence)
5: summary(object=seriesVirtual)
6: summary(object=timeDate)
7: summary(object=timeEvent)
8: summary(object=timeRelative)
9: summary(object=timeSequence)
10: summary(object=timeSpan)
11: summary(object=timeZoneC)
12: summary(object=timeZoneS)
Selection:
```

You enter the number of the desired method and Spotfire S+ displays the associated help file, if it exists, in the Windows help system—the ? command does not check for the existence of the help files before constructing the menu. After each menu selection, Spotfire S+ presents an updated menu showing the remaining choices.

To get back to the Spotfire S+ prompt from within a ? menu, enter 0.

You call help with the name of an S-PLUS function, operator, or data set as an argument. For instance, the following command displays the help file for the c function:

```
> help("c")
```

(The quote marks are optional for most functions but are required for functions and operators containing special characters, such as <-.)

Reading Spotfire S+ Help Files

To get the most information from the Spotfire S+ help system, you should become familiar with the general arrangement of the help files, which are organized as follows (not all files contain all sections):

- **DESCRIPTION**: A short description of the function.
- **USAGE**: The function call with all of its arguments.
- **REQUIRED ARGUMENTS**: Descriptions of arguments that are required by the function.
- **OPTIONAL ARGUMENTS**: Descriptions of arguments that are optional.

- **VALUE**: The return value from the function.
- **SIDE EFFECTS**: Side effects from the function.
- **GRAPHICAL INTERACTION**: A description of graphical interactions expected of the user.
- **CLASSES**: A description of the classes the function is applicable to, if it is a default method.
- **WARNING**: Anything the user should be warned about when using the function.
- **DETAILS**: Descriptions of algorithmic details and implementation issues.
- **BACKGROUND**: Background information on the function or method.
- **NOTE**: Any information that does not fit into the above categories.
- **REFERENCES**: Available texts and papers the user can refer to for additional information.
- **BUGS**: Descriptions of known bugs in the function.
- **SEE ALSO**: Links to related S-PLUS functions.
- **EXAMPLES**: Coded Spotfire S+ examples.
- **Keywords**: A list of keywords that place the help file in the **Contents** topics of the help system.

S-PLUS LANGUAGE BASICS

This section introduces the most basic concepts you need in using the S-PLUS language: expressions, operators, assignments, data objects, and function calls.

Data Objects

When using Spotfire S+, you should think of your data sets as *data objects* belonging to a certain *class*. Each class has a particular *representation*, often defined as a named list of *slots*. Each slot, in turn, contains an object of some other class. Among the most common classes are `numeric`, `character`, `factor`, `list`, and `data.frame`. This chapter introduces the most fundamental data objects; for more information, see the *Programmer's Guide*.

The simplest type of data object is a one-way array of values, all of which are numbers, logical values, or character strings, but not a combination of those. For example, you can have an array of numbers: `-2.0 3.1 5.7 7.3`. Or you can have an array of logical values: `T T F T F T F F`, where `T` stands for `TRUE` and `F` stands for `FALSE`. Or you can have an ordered set of character strings: `"sharp claws"`, `"COLD PAWS"`. These simple one-way arrays are called *vectors* when stored in Spotfire S+. The class `"vector"` is a *virtual class* encompassing all basic classes whose objects can be characterized as one-way arrays. In a vector, any individual value can be extracted and replaced by referring to its *index*, or position in the array. The *length* of a vector is the number of values in the array; valid indices for a vector object `x` are in the range `1:length(x)`. Most vectors belong to one of the following classes: `numeric`, `integer`, `logical`, or `character`. For example, the vectors described above have length 4, 8, and 2 and class `numeric`, `logical`, and `character`, respectively.

Spotfire S+ assigns the class of a vector containing different kinds of values in a way that preserves the maximum amount of information: character strings contain the most information, numbers contain somewhat less, and logical values contain still less. Spotfire S+ coerces less informative values to equivalent values of the more informative type:

```
> c(17, TRUE, FALSE)
[1] 17  1  0
> c(17, TRUE, "hello")
```

```
[1] "17"    "TRUE"  "hello"
```

Data Object Names

Object names must begin with a letter and may include any combinations of uppercase and lowercase letters, numbers, and periods. For example, the following are all valid object names:

```
mydata
data.ozone
RandomNumbers
lottery.ohio.1.28.90
```

The use of periods often enhances the readability of similar data set names, as in the following:

```
data.1
data.2
data.3
```

Objects and methods created with S-PLUS 6 and later often follow a naming scheme that omits periods but adds capital letters to enhance readability:

```
setMethod
signalSeries
```

Warning

You should not choose names that coincide with the names of S-PLUS functions. If you store a function with the same name as a built-in S-PLUS function, access to the S-PLUS function is temporarily prevented until you remove or rename the object you created. Spotfire S+ warns you when you have masked access to a function with a newly created function. To obtain a list of objects that mask other objects, use the `masked` function.

At least seven S-PLUS functions have single-character names: `C`, `D`, `c`, `I`, `q`, `s`, and `t`. You should be especially careful not to name one of your own functions `c` or `t`, as these are functions used frequently in Spotfire S+.

Vector Data Objects

By now you are familiar with the most basic object in S-PLUS, the vector, which is a set of numbers, character values, logical values, etc. *Vectors must be of a single mode*: you cannot have a vector consisting of the values `T, -2.3`. If you try to create such a vector, S-PLUS coerces the elements to a common mode. For example:

```
> c(T,-2.3)
[1]  1.0 -2.3
```

Vectors are characterized by their *length* and *mode*. Length can be displayed with the `length` function, and mode can be displayed with the `mode` function.

Matrix Data Objects

An important data object type in Spotfire S+ is the *two-way array*, or *matrix* object. For example:

```
-3.0    2.1    7.6
 2.5    -.5   -2.6
 7.0   10.0   16.1
 5.3  -21.0   -6.5
```

Matrices and their higher-dimensional analogues, *arrays*, are related to vectors but have an extra structure imposed on them. Spotfire S+ treats these objects similarly by having the matrix and array classes inherit from another virtual class, the `structure` class.

To create a matrix, use the `matrix` function. The `matrix` function takes as arguments a vector and two numbers which specify the number of rows and columns. For example:

```
> matrix(1:12, nrow=3, ncol=4)
     [,1] [,2] [,3] [,4]
[1,]    1    4    7   10
[2,]    2    5    8   11
[3,]    3    6    9   12
```

In this example, the first argument to `matrix` is a vector of integers from 1 through 12. The second and third arguments are the number of rows and columns, respectively. Each row and column is labeled: the row labels are `[1,]`, `[2,]`, `[3,]` and the column labels are `[,1]`, `[,2]`, `[,3]`, `[,4]`. This notation for row and column numbers is derived from mathematical matrix notation.

In the above example, the vector `1:12` fills the first column first, then the second column, and so on. This is called filling the matrix "by columns." If you want to fill the matrix "by rows," use the optional argument `byrow=T` to `matrix`.

For a vector of given length used to fill the matrix, the number of rows determines the number of columns and vice versa. Thus, you need not provide both the number of rows and the number of columns as arguments to matrix; it is sufficient that you provide only one or the other. The following command produces the same matrix as above:

```
> matrix(1:12, 3)
```

You can also create this matrix by specifying the number of columns only. To do this, type:

```
> matrix(1:12, ncol=4)
```

You have to provide the optional argument ncol=4 in *name*=*value* form because, by default, the second argument is taken to be the number of rows. When you use the "by name" form ncol=4 as the second argument, you override the default. See Optional Arguments to Functions on page 436 for further information on using optional arguments in function calls.

The array classes generally have three slots: a .Data slot to hold the actual values, a .Dim slot to hold the dimensions vector, and an optional .Dimnames slot to hold the row and column names. The most important slot for a matrix data object is the dimension slot .Dim. You can use the dim function to display the dimensions of an object:

```
> my.mat <- matrix(1:8,4,2)
> dim(my.mat)
[1] 4 2
```

This shows that the dimension of the matrix my.mat is 4 rows by 2 columns. Matrix objects also have length and mode, which correspond to the length and mode of the vector in the .Data slot. You can use the length and mode functions to view these characteristics of a matrix. Like vectors, a matrix object has a single mode. This means that you cannot create, for example, a two-column matrix with one column of numeric data and one column of character data. For that, you must use a data frame.

Data Frame Objects

S-PLUS contains an object called a *data frame* which is very similar to a matrix object. A data frame object consists of rows and columns of data, just like a matrix object, except that the columns can be of different modes. The following object, baseball.df, is a data frame consisting of some baseball data from the 1988 season. The first two columns are factor objects (codes for names of players), the next two columns are numeric, and the last column is logical.

```
> baseball.df
     bat.ID pitch.ID event.typ outs.play err.play
r1 pettg001 clemr001         2         1        F
r2 whitl001 clemr001        14         0        F
r3 evand001 clemr001         3         1        F
r4 trama001 clemr001         2         1        F
r5 andeb001 morrj001         3         1        F
r6 barrm001 morrj001         2         1        F
r7 boggw001 morrj001        21         0        F
r8 ricej001 morrj001         3         1        F
```

List Objects

The *list* object is the most general and most flexible object for holding data in Spotfire S+. A list is an ordered collection of *components*. Each list component can be any data object, and different components can be of different modes. For example, a list might have three components consisting of a vector of character strings, a matrix of numbers, and another list. Hence, lists are more general than vectors or matrices because they can have components of different types or modes, and they are more general than data frames because they are not restricted to having a rectangular (row by column) nature.

You can create lists with the `list` function. To create a list with two components, one a vector of mode `numeric` and one a vector of character strings, type the following:

```
> list(101:119,c("char string 1","char string 2"))
[[1]]:
 [1] 101 102 103 104 105 106 107 108 109 110 111 112 113
[14] 114 115 116 117 118 119

[[2]]:
[1] "char string 1" "char string 2"
```

The components of the list are labeled by double square-bracketed numbers, here `[[1]]` and `[[2]]`. This notation distinguishes the numbering of list components from vector and matrix numbering. After each component label, Spotfire S+ displays the contents of that component.

For greater ease in referring to list components, it is often useful to name the components. You do this by giving each argument in the list function its own name. For instance, you can create the same list as above, but name the components “a” and “b” and save the list data object with the name xyz:

```
> xyz <- list(a = 101:119,
+ b = c("char string 1", "char string 2"))
```

To take advantage of the component names from the list command, use the name of the list, followed by a $ sign, followed by the name of the component. For example, the following two commands display components a and b, respectively, of the list xyz.

```
> xyz$a
 [1] 101 102 103 104 105 106 107 108 109 110 111 112 113
[14] 114 115 116 117 118 119
> xyz$b
[1] "char string 1" "char string 2"
```

Managing Data Objects

In S-PLUS any object you create at the command line is permanently stored on disk until you remove it. This section describes how to name, store, list, and remove your data objects.

Assigning Data Objects

To name and store data in S-PLUS, use one of the *assignment* operators <- or _. (Do *not* use the _ character in names!) For example, to create a vector consisting of the numbers 4, 3, 2, 1 and store it with the name x, use the c function and type:

```
> x <- c(4,3,2,1)
```

You type <- by typing two keys on your keyboard: the “less than” key (<) followed by the minus (-) character, with no intervening space.

To store the vector containing the integers 1 through 10 in y, type:

```
> y <- 1:10
```

The following assignment expressions use the operator _ and are identical to the two previous assignments above:

```
> x _ c(4,3,2,1)
> y_1:10
```

The <- form of the assignment operator is highly suggestive and readable, so the examples in this manual use the arrow.

Storing Data Objects

Data objects in your working directory are permanent. They remain even if you quit Spotfire S+ and start Spotfire S+ again later.

You can also change the directory location where S-PLUS objects are stored by using the `attach` function (or by using the **Object Explorer**). See the `attach` help file for further information.

Listing Data Objects

To display a list of the names of the data objects in your working directory, use the `objects` function as follows:

```
> objects()
```

If you created the vectors `x` and `y` as described on page 429, you see these listed in your working directory.

The S-PLUS `objects` function also searches for objects whose names match a character string given to it as an argument. The pattern may include wildcard characters. For instance, the following expression displays all of your objects that start with the letter `d`:

```
> objects("d*")
```

See the help file for `grep` for information on wildcards and how they work.

Removing Data Objects

Because S-PLUS objects are permanent, from time to time you should remove objects you no longer need. Use the `rm` function to remove objects. The `rm` function takes any number of objects as its arguments and removes each one. For instance, to remove two objects named `a` and `b`, use the following expression:

```
> rm(a,b)
```

Displaying Data Objects

To look at the contents of a stored data object, just type its name:

```
> x
[1] 4 3 2 1
> y
[1] 1 2 3 4 5 6 7 8 9 10
```

Functions

A *function* is an S-PLUS expression that returns a value, usually after performing some operation on one or more *arguments*. For example, the c function returns a vector formed by combining the arguments to c. You *call* a function by typing an expression consisting of the name of the function followed by a pair of parentheses, which may enclose some arguments separated by commas. For example, runif is a function that produces random numbers uniformly distributed between 0 and 1. To get Spotfire S+ to compute 10 such numbers, type runif(10):

```
> runif(10)
 [1] 0.6033770 0.4216952 0.7445955 0.9896273 0.6072029
 [6] 0.1293078 0.2624331 0.3428861 0.2866012 0.6368730
```

Spotfire S+ displays the results computed by the function, followed by a new prompt. In this case, the result is a vector object consisting of 10 random numbers generated by a uniform random number generator. The square-bracketed numbers, here [1] and [6], help you keep track of how many numbers are displayed on each line and help you locate particular numbers.

One of the functions in S-PLUS that you will use frequently is the function c, which allows you to combine data values into a vector. For example:

```
> c(3,7,100,103)
[1] 3 7 100 103
> c(T,F,F,F,T,T)
[1] T F F F T T
> c("sharp teeth", "COLD PAWS")
[1] "sharp teeth" "COLD PAWS"
> c("sharp teeth", 'COLD PAWS')
[1] "sharp teeth" "COLD PAWS"
```

The last example illustrates that either the double-quote character (") or the single-quote character (') can be used to delimit character strings.

Usually, you want to assign the result of the c function to an object with another name that is permanently saved (until you remove it). For example:

```
> weather <- c("hot day","COLD NIGHT")
> weather
[1] "hot day" "COLD NIGHT"
```

Some functions in S-PLUS are commonly used with no arguments. For example, recall that you quit Spotfire S+ by typing `q()`. The parentheses are still required so that Spotfire S+ can recognize that the expression is a function.

When you accidentally leave off the `()` when typing a function name, the function text is displayed on the screen. (Typing any object's name causes Spotfire S+ to print that object; a function object is simply the definition of the function.) To call the function, you need to retype the function name with parentheses.

For instance, if you accidentally type `q` instead of `q()` when you want to quit Spotfire S+, the body of the function `q` is displayed. In this case, the body of the function is only two lines long.

```
> q
function(...)
.Internal(q(...), "S_dummy", T, 33)
>
```

No harm has been done. All you need to do now is correctly type `q()` and you will exit Spotfire S+.

```
> q()
```

Operators

An *operator* is a function with at most two arguments that can be represented by one or more special symbols appearing between the arguments.

For example, the usual arithmetic operations of addition, subtraction, multiplication, and division are represented by the operators `+`, `-`, `*`, and `/`, respectively. Here are some simple calculations using the arithmetic operators:

```
> 3+71
[1] 74
> 3*121
[1] 363
> (6.5 - 4)/5
[1] .5
```

The exponentiation operator is ^, which can be used as follows:

```
> 2 ^ 3
[1] 8
```

Some operators work with only one argument and hence are called *unary* operators. For example, the subtraction operator - can act as a unary operator:

```
> -3
[1] -3
```

The colon (:) is an important operator for generating sequences of integers:

```
> 1:10
 [1]  1  2  3  4  5  6  7  8  9 10
```

Table 8.2 lists the S-PLUS operators for comparison and logic. Comparisons are among the most common sources for logical data:

```
> (1:10) > 5
 [1] F F F F F T T T T T
```

Comparisons and logical operations are frequently convenient for extracting subsets of data, and conditionals using logical comparisons play an important role in flow of control in functions.

Table 8.2: *Logical and comparison operators.*

Operator	**Explanation**	**Operator**	**Explanation**
==	Equal to	!=	Not equal to
>	Greater than	<	Less than
>=	Greater than or equal to	<=	Less than or equal to
&	Vectorized And	|	Vectorized Or
&&	Control And	||	Control Or
!	Not		

Expressions

An *expression* is any combination of functions, operators, and data objects. For example:

```
x <- c(4,3,2,1)
```

is an expression that involves an operator (the assignment operator) and a function (the combine function).

Here are a few more examples to give you an indication of the variety of expressions you will be using in S-PLUS:

```
> 3 * runif(10)
[1] 1.6006757 2.2312820 0.8554818 2.4478138 2.3561580
[6] 1.1359854 2.4615688 1.0220507 2.8043721 2.5683608
> 3*c(2,11)-1
[1]  5 32
> c(2*runif(5),10,20)
[1] 0.6010921  0.3322045  1.0886723  0.3510106
[5] 0.9838003 10.0000000 20.0000000
> 3*c(2*x,5)-1
[1] 23 17 11  5 14
```

The last two examples above illustrate a general feature of Spotfire S+ functions: arguments to functions can themselves be S-PLUS expressions.

Here are three examples of expressions that are important because they show how arithmetic works in Spotfire S+ when you use expressions involving both vectors and numbers. If x consists of the numbers 4, 3, 2, 1, then the following operations work on each element of x:

```
> x-1
[1] 3 2 1 0
> 2*(x-1)
[1] 6 4 2 0
> x ^ 2
[1] 16 9 4 1
```

Any time you use an operator with a vector as one argument and a number as the other argument, the operation is performed on each component of the vector.

Precedence Hierarchy

The evaluation of S-PLUS expressions follows a *precedence hierarchy*, shown below in Table 8.3. Operators appearing higher in the table have higher precedence than those appearing lower; operators on the same line have equal precedence.

Table 8.3: *Precedence of operators.*

Operator	Use
`$`	Component selection
`[   [[`	Subscripts, elements
`^`	Exponentiation
`-`	Unary minus
`:`	Sequence operator
`%%   %/%   %*%`	Modulus, integer divide, matrix multiply
`*   /`	Multiply, divide
`+   -`	Add, subtract
`<>   <=   >=   ==   !=`	Comparison
`!`	Not
`&   |   &&   ||`	And, or
`~`	Formulas
`<<-   ->   <-  _`	Assignments

Note

When using the ^ operator, if the base is a negative number, the exponent must be an integer.

Among operators of equal precedence, evaluation proceeds from left to right within an expression. Whenever you are uncertain about the precedence hierarchy for evaluating an expression, you should use parentheses to make the hierarchy explicit. S-PLUS shares a common feature with many computer languages in that the innermost parentheses are evaluated first and so on until the outermost parentheses are evaluated. For example, let's assign the value 5 to a vector (of length 1) called x:

```
> x <- 5
```

and use the *sequence* operator : to show the difference between how the expression is evaluated with and without parentheses. In the expression 1:(x-1), (x-1) is evaluated first with 4 being the result, so Spotfire S+ displays the integers from 1 to 4:

```
> 1:(x-1)
[1] 1 2 3 4
```

With the parentheses left off, the expression becomes 1:x-1. Because the : operator has greater precedence than the - operator, 1:x-1 is interpreted by Spotfire S+ as meaning "take the integers from 1 to 5 and then subtract 1 from each integer." Hence, the output is of length 5 instead of length 4 and starts at 0 instead of 1, as follows:

```
> 1:x-1
[1] 0 1 2 3 4
```

When using Spotfire S+, keep in mind the effect of parentheses and of the default operator hierarchy.

Optional Arguments to Functions

One powerful feature of S-PLUS functions is considerable flexibility through the use of *optional* arguments. At the same time, simplicity is maintained because sensible *defaults* for optional arguments have been built in and the number of *required* arguments is kept to a minimum.

You can determine which arguments are required and which are optional by looking in the help file in the **REQUIRED ARGUMENTS** and **OPTIONAL ARGUMENTS** sections.

For example, to produce 50 random normal numbers with mean 0 and standard deviation 1, use the following:

```
> rnorm(50)
```

If you want to produce 50 random normal numbers with mean 3 and standard deviation 5, you can use any of the following:

```
> rnorm(50, 3, 5)
> rnorm(50, sd=5, mean=3)
> rnorm(50, m=3, s=5)
> rnorm(m=3, s=5, 50)
```

In the first expression, you are supplying the optional arguments *by value*. When supplying optional arguments by value, you must supply all the arguments in the order they are given in the help file **USAGE** statement.

In the second through fourth expressions above, you are supplying the optional arguments *by name*. When supplying arguments by name, order is not important. However, we recommend that for consistency of style, you supply optional arguments after required arguments.

The third and fourth expressions illustrate that you can abbreviate the formal argument names of optional arguments for convenience so long as the names are uniquely identified. You will find that supplying arguments by name is convenient because you can then supply them in any order.

Of course, you do not need to specify *all* of the optional arguments. For instance, the following are two equivalent ways to produce 50 random normal numbers with mean 0 (the default) and standard deviation 5:

```
> rnorm(50, m=0, s=5)
> rnorm(50, s=5)
```

IMPORTING AND EDITING DATA

There are many kinds and sizes of data sets that you may want to work on in Spotfire S+. The first step is to get your data into Spotfire S+ in appropriate data object form. In this section, we show you how to import data sets that exist as files and how to enter small data sets from your keyboard.

Reading a Data File

The data you are interested in may have been created in Spotfire S+ but more likely it came to you in some other form, perhaps as an ASCII file or perhaps from someone else's work in another software package, such as SAS. You can read data from a variety of sources using the S-PLUS function `importData`.

For example, say you have a SAS file named **test.sd2** in your Spotfire S+ working directory. To import that file using the `importData` function, you must supply that function's two required arguments: `file` (the name of the file to read) and `type` (the type of file to read):

```
> myData <- importData(file="test.sd2", type="SAS")
```

When Spotfire S+ reads the data file, it creates the `myData` data frame and displays it in a **Data** window.

Entering Data From the Keyboard

To get a small data set into Spotfire S+, create an S-PLUS data object using the function `scan()` with no argument:

```
mydata <- scan()
```

where *`mydata`* is any legal data object name. Spotfire S+ prompts you for input, as described in the following example. We enter 14 data values and assign them to the object `diff.hs`. At the Spotfire S+ prompt, type the name `diff.hs` and assign to it the results of the `scan` command. Spotfire S+ responds with the prompt `1:`, which means that you should enter the first value.

You can enter as many values per line as you like, separated by spaces. When you press RETURN, Spotfire S+ prompts with the index of the next value it is waiting for. In the following example, Spotfire S+ responds with `6:` because you entered 5 values on the first line.

When you finish entering data, press RETURN in response to the : prompt, and Spotfire S+ returns to the Spotfire S+ command prompt >.

The complete example appears on your screen as follows:

```
> diff.hs <- scan()
1: .06 .13 .14 -.07 -.05
6: -.31 .12 .23 -.05 -.03
11: .62 .29 -.32 -.71
15:
>
```

Reading an ASCII File

Entering data from the keyboard is a relatively uncommon task in Spotfire S+. More typically, you have a vector data set stored as an ASCII file, which you want to read into Spotfire S+. An ASCII file usually consists of numbers separated by spaces, tabs, newlines, or other delimiters.

Let's say you have a file called **vec.dat** in your working directory, containing the following data:

```
62 60 63 59
63 67 71 64 65 66
88 66 71 67 68 68
56 62 60 61 63 64 63 59
```

You read the file **vec.dat** into Spotfire S+ by using the `scan` command with `"vec.dat"` as an argument:

```
> x <- scan("vec.dat")
```

The quotation marks around the `vec.dat` argument to scan are required. You can now type `x` to display the data object named `x` that you have read into Spotfire S+ from the file **vec.dat**.

If the file you want to read is not in your working directory, you must use the entire path name. So if the file **vec.dat** is in a directory with path name **c:\mabel\test\vec.dat**, then type:

```
> vec.data <- scan("c:\\mabel\\test\\vec.dat")
```

(Note that you have to double the backslashes because Spotfire S+ treats the backslash as an escape character.)

Other data objects can be read from ASCII files as well, particularly tables of data that can be used to create data frames. For example, suppose you have a data file, **auto.dat**, containing the following information:

```
Model             Price  Country  Reliab  Mileage  Type
AcuraIntegra4     11950  Japan    5       NA       Small
Audi1005          26900  Germany  NA      NA       Medium
BMW325i6          24650  Germany  94      NA       Compact
ChevLumina4       12140  USA      NA      NA       Medium
FordFestiva4      6319   Korea    4       37       Small
Mazda929V6        23300  Japan    5       21       Medium
MazdaMX-5Miata    13800  Japan    NA      NA       Sporty
Nissan300ZXV6     27900  Japan    NA      NA       Sporty
OldsCalais4       9995   USA      2       23       Compact
ToyotaCressida6   21498  Japan    3       23       Medium
```

You can read this into an S-PLUS data frame using the `read.table` function as follows:

```
> auto <- read.table("auto.dat", header=T)
```

The optional argument `header=T` tells Spotfire S+ to use the first line of the file for variable names.

You can also read ASCII files with the `importData` function using type `"ASCII"`.

Editing Data

After you have created an S-PLUS data object, you may want to change some of the data you have entered. For editing data objects, use the `Edit.data` function, which opens the data in a Spotfire S+ **Data** window. To edit S-PLUS functions, the easiest way to modify the data is to use the `Edit` function, which dumps the function into a Spotfire S+ **Script** window for editing. To use a more full-featured text editor, use the `fix` function, which uses the editor specified in your Spotfire S+ session options (by default, **notepad**).

With `fix`, you create a copy of the original data object, edit it, and then reassign the result under its original name. If you already have a favorite editor, you can use it by specifying it with the `options` function. For example, if you prefer to use Microsoft Word as your editor, you can set this up easily as follows:

```
> options(editor="c:\\Program Files\\Microsoft Office\\
+ Office\\winword")
```

Built-In Data Sets

Spotfire S+ comes with a large number of *built-in* data sets. These data sets provide examples for illustrating the use of Spotfire S+ without forcing you to take the time to enter your own data. When Spotfire S+ is used as a teaching aid, the built-in data sets provide a useful basis for problem assignments in data analysis.

To get Spotfire S+ to display a built-in data set, just type its name at the > prompt. The built-in data sets in Spotfire S+ include data objects of various types.

To find these built-in data sets, use the `search` function. It will return a list of currently attached object databases:

```
> search()
 [1] "C:\\DOCUME~1\\MYDOCU~1\\Spotfi~1\\Project1"
 [2] "splus"
 [3] "stat"
 [4] "data"
 [5] "trellis"
 [6] "nlme3"
 [7] "menu"
 [8] "sgui"
 [9] "winjava"
[10] "SPXML"
[11] "main"
```

EXTRACTING SUBSETS OF DATA

Another powerful feature of the S-PLUS language is the capability to extract subsets of data for viewing or for further manipulation. The examples in this section illustrate subset extraction for vectors and matrices; similar techniques can be used to extract subsets of data from other S-PLUS data objects.

Subsetting From Vectors

Suppose you create a vector of length 5, consisting of the integers 5, 14, 8, 9, 5, as follows:

```
> x <- c(5,14,8,9,5)
> x
[1]  5 14  8  9  5
```

To display a single element of this vector, just type the vector's name followed by the element's index within `[]` characters. For example, type `x[1]` to display the first element and `x[4]` to display the fourth element:

```
> x[1]
[1] 5
> x[4]
[1] 9
```

To display more than one element at a time, use the `c` function within the `[]` characters. The following displays the second and fifth elements of `x`.

```
> x[c(2,5)]
[1] 14  5
```

Use negation to display all elements *except* a specified element or list of elements. For instance, `x[-4]` displays all elements except the fourth:

```
> x[-4]
[1]  5 14  8  5
```

Similarly, `x[-c(1,3)]` displays all elements except the first and third:

```
> x[-c(1,3)]
[1] 14  9  5
```

A more advanced use of subsetting uses a logical expression within the [] characters. Logical expressions divide a vector into two subsets–one for which a given condition is true and one for which the condition is false. When used as a subscript, the expression returns the subset for which the condition is true.

For instance, the following expression selects all elements with values greater than 8:

```
> x[x>8]
[1] 14  9
```

In this case, the second and fourth elements of x, with values 14 and 9, meet the requirements of the logical expression x > 8 and so are displayed.

As usual in Spotfire S+, you can assign the result of the operation to another object. For example, you could assign the above selected subset to an object named y and then display y or use y in subsequent calculations:

```
> y <- x[x>8]
> y
[1] 14  9
```

In the next section, you will see that the same principles also apply to matrix data objects, although the syntax is a little more complicated because there are two dimensions from which selections may be made.

Subsetting From Matrices

A single element of a matrix can be selected by typing its coordinates inside the square brackets as an ordered pair, separated by commas. We use the built-in dataset state.x77 to illustrate. The first index inside the [] operator is the row index, and the second index is the column index. The following command displays the value in the third row, eighth column of state.x77:

```
> state.x77[3,8]
[1] 113417
```

You can also display an element using row and column dimnames, if such labels have been defined. So, to display the above value, which happens to be in the row named Arizona and the column named Area, use the following command:

```
> state.x77["Arizona","Area"]
[1] 113417
```

To select sequential rows and/or columns from a matrix object, use the : operator for both the row and/or the column index. The following expression selects the first 4 rows and columns 3 through 5 for assignment to object x:

```
> x <- state.x77[1:4,3:5]
> x
         Illiteracy Life Exp Murder
 Alabama        2.1    69.05   15.1
  Alaska        1.5    69.31   11.3
 Arizona        1.8    70.55    7.8
Arkansas        1.9    70.66   10.1
```

The c function can be used to select rows and/or columns of matrices, just as it was used for vectors, above. For instance, the following expression selects rows 5, 22, and 44, and columns 1, 4, and 7 of state.x77:

```
> state.x77[c(5,22,44),c(1,4,7)]
           Population Life Exp Frost
California      21198     71.71    20
  Michigan       9111     70.63   125
      Utah       1203     72.90   137
```

As before, if row or column names have been defined, they can be used in place of the index numbers:

```
> state.x77[c("California","Michigan","Utah"),
+ c("Population","Life Exp","Frost")]
           Population Life Exp Frost
California      21198     71.71    20
  Michigan       9111     70.63   125
      Utah       1203     72.90   137
```

To select all rows, leave the expression before the comma blank; to select all columns, leave the expression after the comma blank. The following expression selects all columns for the rows `California`, `Michigan`, and `Utah`. Notice that the closing bracket appears immediately after the comma, meaning that all columns are selected:

```
> state.x77[c("California","Michigan","Utah"),]
           Population Income Illiteracy Life Exp Murder
California      21198   5114        1.1    71.71   10.3
  Michigan       9111   4751        0.9    70.63   11.1
      Utah       1203   4022        0.6    72.90    4.5

           HS Grad Frost   Area
California    62.6    20 156361
  Michigan    52.8   125  56817
      Utah    67.3   137  82096
```

GRAPHICS IN Spotfire S+

Graphics are central to the Spotfire S+ philosophy of looking at your data visually as a first and last step in any data analysis. With its broad range of built-in graphics functions and its programmability, Spotfire S+ lets you look at your data from many angles. This section describes how to use Spotfire S+ to create simple plots. To put Spotfire S+ to work creating the many other types of plots, see the *Guide to Graphics*, available from the **Help ▶ Online Manuals** menu item.

Making Plots

Plotting engineering, scientific, financial, or marketing data, including the preparation of camera-ready copy on a laser printer, is one of the most powerful and frequently used features of Spotfire S+. Spotfire S+ has a wide variety of plotting and graphics functions for you to use.

The most frequently used S-PLUS plotting function is `plot`. When you call a plotting function, a Spotfire S+ graphics window displays the requested plot:

```
> plot(car.miles)
```

The argument `car.miles` is a built-in S-PLUS vector data object. Since there is no other argument to `plot`, the data are plotted against their natural index or observation numbers, 1 through 120.

Since you may be interested in gas mileage, you may want to plot `car.miles` against `car.gals`. This is also easy to do with `plot`:

```
> plot(car.gals, car.miles)
```

The result is shown in Figure 8.3.

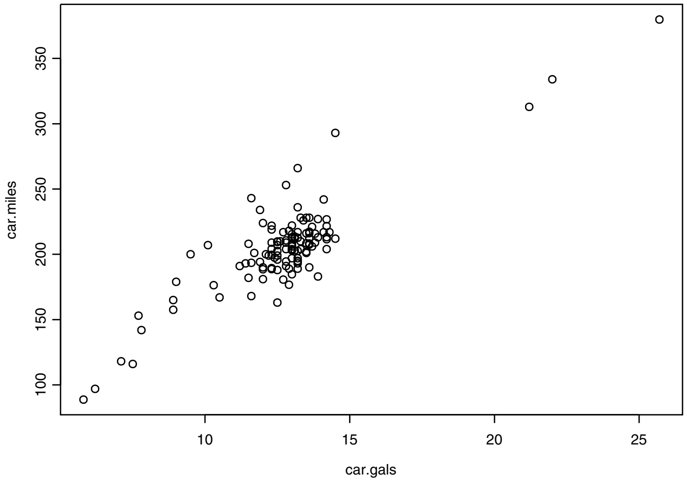


Figure 8.3: *A Spotfire S+ plot.*

You can use many S-PLUS functions besides `plot` to display graphical results in a Spotfire S+ graphics window. Many of these functions are listed in Table 8.4 and Table 8.5, which display, respectively, high-level and low-level plotting functions. High-level plotting functions create a new plot, complete with axes, while low-level plotting functions typically add to an existing plot.

Table 8.4: *Common high-level plotting functions.*

`barplot, hist`	Bar graph, histogram
`boxplot`	Boxplot
`brush`	Brush pair-wise scatter plots; spin 3D axes
`contour, image, persp, symbols`	3D plots
`coplot`	Conditioning plot
`dotchart`	Dotchart
`faces, stars`	Display multivariate data

Table 8.4: *Common high-level plotting functions. (Continued)*

`map`	Plot all or part of the U.S. (part of the maps library)
`pairs`	Plot all pair-wise scatter plots
`pie`	Pie chart
`plot`	Generic plotting
`qqnorm, qqplot`	Normal and general QQ-plots
`scatter.smooth`	Scatter plot with a smooth curve
`tsplot`	Plot a time series
`usa`	Plot the boundary of the U.S.

Table 8.5: *Common low-level plotting functions.*

`abline`	Add line in intercept-slope form
`axis`	Add axis
`box`	Add a box around plot
`contour, image, persp, symbols`	Add 3D information to plot
`identify`	Use mouse to identify points on a graph
`legend`	Add a legend to the plot
`lines, points`	Add lines or points to a plot
`mtext, text`	Add text in the margin or in the plot

Table 8.5: *Common low-level plotting functions. (Continued)*

`stamp`	Add date and time information to the plot
`title`	Add title, *x*-axis labels, *y*-axis labels, and/or subtitle to plot

Multiple Plot Layout

It is often desirable to display more than one plot in a window or on a single page of hard copy. To do so, you use the S-PLUS function `par` to control the layout of the plots. The following example shows you how to use `par` for this purpose. The `par` command is used to control and customize many aspects of Spotfire S+ plots.

In this example, you use `par` to set up a window or a page to have four plots in two rows of two each. Following the `par` command, we issue four plot commands. Each creates a simple plot with a main title.

```
> par(mfrow=c(2,2))
> plot(1:10,1:10,main="Straight Line")
> hist(rnorm(50),main="Histogram of Normal")
> qqnorm(rt(100,5),main="Samples from t(5)")
> plot(density(rnorm(50)),main="Normal Density", type="l")
```

The result is shown in Figure 8.4.

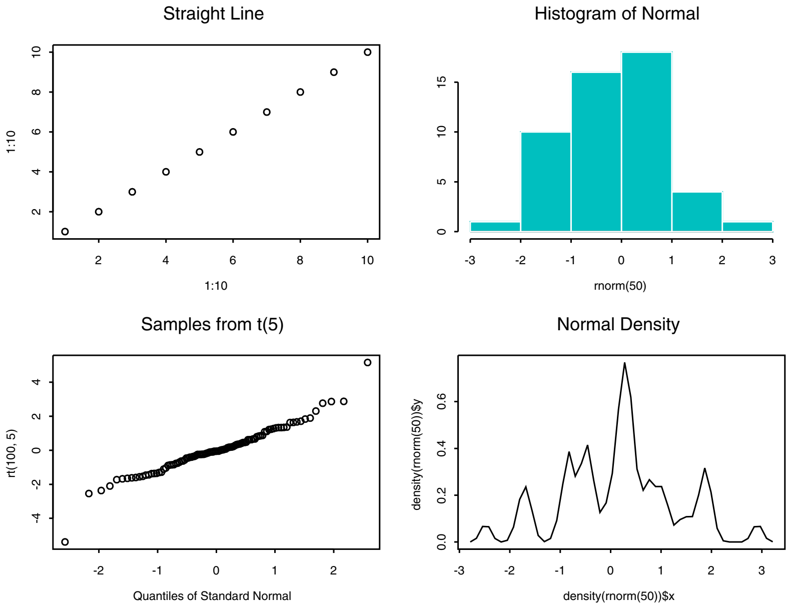


Figure 8.4: *A multiple-plot layout.*

STATISTICS

S-PLUS includes functions for doing all kinds of statistical analysis, including hypothesis testing, linear regression, analysis of variance, contingency tables, factor analysis, survival analysis, and time series analysis.

This section gives overviews of the functions that produce summary statistics, perform hypothesis tests, and fit statistical models.

Summary Statistics

S-PLUS includes functions for calculating all the standard summary statistics for a data set, together with a variety of robust and/or resistant estimators of location and scale. Table 8.6 gives a list of the most common functions for summary statistics.

Table 8.6: *Common functions for summary statistics.*

`cor`	Correlation coefficient

`cummax, cummin,`
`cumprod, cumsum`
	Cumulative maximum, minimum, product, and sum

`diff`	Create sequential differences
`max, min`	Maximum and minimum
`pmax, pmin`	Maxima and minima of several vectors
`mean`	Arithmetic mean
`median`	50th percentile
`prod`	Product of elements of a vector
`quantile`	Compute empirical quantiles
`range`	Returns minimum and maximum of a vector
`sample`	Random sample or permutation of a vector

Table 8.6: *Common functions for summary statistics. (Continued)*

sum	Sum elements of a vector
summary	Summarize an object
var	Variance and covariance

The summary function is a generic function, providing appropriate summaries for different types of data. For example, for an object of class `lm` created by fitting a linear model, the returned summary includes the table of estimated coefficients, their standard errors, and t-values, along with other information. The summary for a standard vector is a six-number summary of the minimum, maximum, mean, median, and first and third quartiles:

```
> summary(stack.loss)
 Min. 1st Qu. Median  Mean 3rd Qu. Max.
    7      11     15 17.52      19   42
```

Hypothesis Testing

S-PLUS contains functions for doing classical hypothesis testing, as shown in Table 8.7.

Table 8.7: *S-PLUS functions for hypothesis testing.*

Test	Description
t.test	Student's one- or two-sample t-test
wilcox.test	Wilcoxon rank sum and signed-rank sum tests
chisq.test	Pearson's chi square test for 2D contingency table
var.test	F test to compare two variances
kruskal.test	Kruskal-Wallis rank sum test
fisher.test	Fisher's exact test for 2D contingency table

Table 8.7: *S-PLUS functions for hypothesis testing. (Continued)*

Test	**Description**
`binom.test`	Exact binomial test
`friedman.test`	Friedman rank sum test
`mcnemar.test`	McNemar's chi square test
`prop.test`	Proportions test
`cor.test`	Test for zero correlation
`mantelhaen.test`	Mantel-Haenszel chi square test

The following example illustrates how to use `t.test` to perform a two-sample t-test to detect a difference in means. This example uses two random samples generated from N(0,1) and N(1,1) distributions. We set the random number seed with the function `set.seed`, so this example is reproducible:

```
> set.seed(19)
> x <- rnorm(10)
> y <- rnorm(5, mean=1)
> t.test(x,y)
  Standard Two-Sample t-Test

data:  x and y
t = -1.4312, df = 13, p-value = 0.176
alternative hypothesis: true difference in means is not
  equal to 0
95 percent confidence interval:
 -1.7254080  0.3502894
sample estimates:
  mean of x mean of y
 -0.4269014 0.2606579
```

Statistical Models

Most of the statistical modeling functions in S-PLUS follow a unified modeling paradigm in which the input data are represented as a data frame and the model to be fit is represented as a formula. Formulas can be saved as separate S-PLUS objects and supplied as arguments to the modeling functions.

A partial listing of S-PLUS modeling functions is given in Table 8.8.

Table 8.8: *S-PLUS modeling functions.*

Function	Description
`aov, manova`	Analysis of variance models
`lm`	Linear model (regression)
`glm`	Generalized linear model (including logistic and Poisson regression)
`gam`	Generalized additive model
`loess`	Local regression model
`tree`	Classification and regression tree models
`nls, ms`	Nonlinear models
`lme, nlme`	Mixed-effects models
`factanal`	Factor analysis
`princomp`	Principal components analysis
`pam, fanny, diana, agnes, daisy, clara`	Cluster analysis

In a formula, you specify the response variable first, followed by a tilde (~) and the terms to be included in the model. Variables in formulas can be any expression that evaluates to a numeric vector, a factor or ordered factor, or a matrix. Table 8.9 gives a summary of the formula syntax.

Table 8.9: *Summary of the S-PLUS formula syntax.*

Expression	Meaning
`A ~ B`	`A` is modeled as `B`
`B + C`	Include both `B` and `C` in the model
`B - C`	Include all of `B` except what is in `C` in the model
`B:C`	The interaction between `B` and `C`
`B*C`	Include `B`, `C`, and their interaction in the model
`C %in% B`	`C` is nested within `B`
`B/C`	Include `B` and `C %in% B` in the model

The following sample Spotfire S+ session illustrates some steps to fit a regression model to the `fuel.frame` data containing five variables for 60 cars. We do not show the output; type these commands in your **Commands** window and you'll get a good feel for doing data analysis with the S-PLUS language:

```
> names(fuel.frame)
> par(mfrow=c(3,2))
> plot(fuel.frame)
> pairs(fuel.frame)
> attach(fuel.frame)
> par(mfrow=c(2,1))
> scatter.smooth(Mileage ~ Weight)
> scatter.smooth(Fuel ~ Weight)
> lm.fit1 <- lm(Fuel ~ Weight)
> lm.fit1
> names(lm.fit1)
> summary(lm.fit1)
> qqnorm(residuals(lm.fit1))
> plot(lm.influence(lm.fit1)$hat, type="h",
+ xlab = "Case Number", ylab = "Hat Matrix Diagonal")
> o.type <- ordered(Type, c("Small", "Sporty", "Compact",
+ "Medium", "Large", "Van"))
> par(mfrow=c(1,1))
> coplot(Fuel ~ Weight | o.type,
+ given.values=sort(unique(o.type)))
> lm.fit2 <- update(lm.fit1, . ~ . + Type)
> lm.fit3 <- update(lm.fit2, . ~ . + Weight:Type)
> anova(lm.fit1, lm.fit2, lm.fit3)
> summary(lm.fit3)
```

DEFINING FUNCTIONS

S-PLUS is a powerful programming language that can be used to design large, complex systems. As with any programming language, the more you learn about the S-PLUS language, the more of its power you'll be able to harness. Unlike most programming languages, however, Spotfire S+ lets you use many of its features right away. In this chapter, we've seen a variety of functions for data generation, data manipulation, and statistics. You may find yourself using some combination of these functions repeatedly, sometimes typing a long list of options over and over again. You can increase your productivity and avoid typographical errors by incorporating these repetitive tasks into a single function.

To define a new function, you type an expression of the following form:

```
newfunction <- function(arguments){
                    body of definition
                    }
```

where `newfunction` is the name you've chosen for your new function, `arguments` are the names of the arguments, if any, and `body of definition` contains one or more valid S-PLUS expressions, separated by semicolons or newlines.

For example, suppose you are obtaining weather information from volunteer reporters. Each reporter sends you, once a month, a listing of the daily high and low temperatures in his or her town. Since the reporters are volunteers, they are less than perfect in making and recording their observations. So most of your listings contain missing values. You patiently enter all their observations, including the missing values using the value `NA`, and then want to analyze the data. You'd like to obtain mean temperatures for each location, and you find that the `mean` function has an argument, `na.rm`, that you can use to remove the `NA`s before computing the various means. But you have twenty locations for which you want to compute the means; this can quickly become tedious.

The following function supposes you will supply as the `location` argument a data set containing one variable for each location. When run, this function returns the mean temperature for each location.

```
temp.means <- function(location)
{
    apply(location, 2, mean, na.rm=T)
}
```

The `apply` function here *applies* the function `mean` to the columns of the data set provided as the argument `location`. (If we had used a "1" instead of a "2" in the call, the function would be applied to the *rows* instead.) The last argument to `apply` is the argument we want to supply to `mean`, namely, `na.rm`.

USING SPOTFIRE S+ IN BATCH MODE

Once you've created a function to do a complicated analysis and verified that it works, you may want to set it to work on a very large data set. Complicated analyses on very large data sets can take a long time, however. Detailed information on using the batch commands for Windows and Unix can be found in Chapter 13, Verbose Logging, of the *Application Developer's Guide.*

Batch mode provides a way to perform intensive computations without your constant attention. The **SBATCH** command has the following form from a Command Prompt (sometimes called a DOS Prompt):

```
Splus SBATCH [args] inputfile
```

where `inputfile` is the input file you create for use in the batch job. Note that you must specify the command in uppercase letters.

To run the**SBATCH** command, do one of the following:

- From within Windows, choose **Run** from the **Start** menu, type your S-PLUS **SBATCH** command line in the dialog, and click **OK**.
- From a DOS prompt, type your S-PLUS **SBATCH** command line and press ENTER.

For example, suppose you are studying the effects of a cancer treatment on white blood count over time and each month you receive a report in the form of an ASCII file from each of 14 hospitals. The ASCII file contains, for each patient in the study, the name, age, gender, treatment type, white blood count, and other information. You've developed a function, `update.data`, to read in one of the reports and update the data for each patient listed. You use this function exactly 14 times each month, when you read in each of the monthly reports. It will save you time in the long run, and be more convenient to use, if you create an input file **update.dat** containing the following:

```
update.data("hospital.1")
update.data("hospital.2")
...
update.data("hospital.14")
```

Then, each month, copy each hospital's report to the appropriately numbered file (**hospital.*x***). When all the reports are in, type

```
Splus SBATCH --logfile update.slg update.dat
```

The command reads input from the file **update.dat** (the last argument entered) and writes output and errors to the logfile **update.slg**.

If you want to save error messages in a separate file, you can specify an error file. For example, to store errors from the update job in the file **update.txt**, use the following command:

```
Splus SBATCH --logfile update.slg --output update.txt
update.dat
```

You can type your batch commands directly from the keyboard if you specify `stdin` as the *`inputfile`*, as follows:

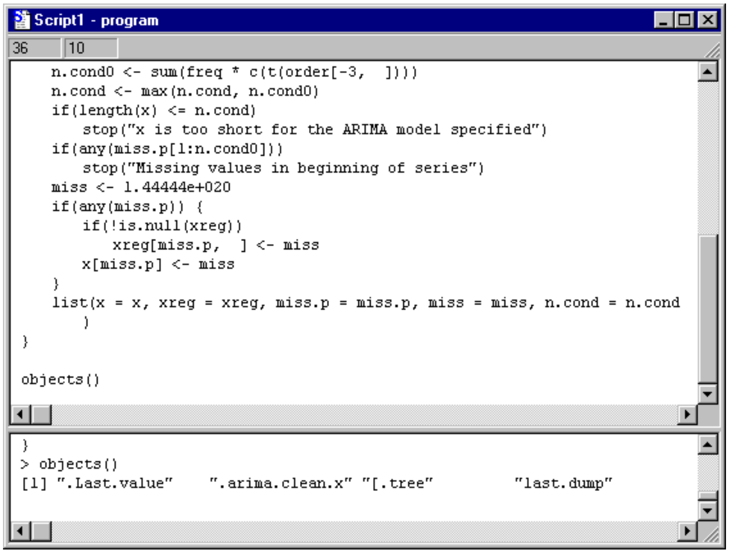
```
Splus SBATCH --output update.txt update.dat
```

USING THE SCRIPT AND REPORT WINDOWS

9

INTRODUCTION

With the **Script** window, you can write scripts (programs) to automate the more repetitive aspects of analyzing data and creating graphs. You use a **Script** window to edit your scripts. Each **Script** window has an output pane that displays output from the running script and a program pane that is used to type in the commands that make up the script. Scripts give you access to the S-PLUS programming language. You can write commands to be executed to import or export data, transform data, run analyses, and create, modify, or print graphs, etc.



```
    n.cond0 <- sum(freq * c(t(order[-3,  ])))
    n.cond <- max(n.cond, n.cond0)
    if(length(x) <= n.cond)
        stop("x is too short for the ARIMA model specified")
    if(any(miss.p[1:n.cond0]))
        stop("Missing values in beginning of series")
    miss <- 1.44444e+020
    if(any(miss.p)) {
        if(!is.null(xreg))
            xreg[miss.p,  ] <- miss
        x[miss.p] <- miss
    }
    list(x = x, xreg = xreg, miss.p = miss.p, miss = miss, n.cond = n.cond
        )
}

objects()
```

```
}
> objects()
[1] ".Last.value"    ".arima.clean.x" "[.tree"         "last.dump"
```

Figure 9.1: *A **Script** window, showing the program pane (above) and output pane (below).*

You can execute scripts from within Spotfire S+ or from another application (via DDE or by calling Spotfire S+ and passing the script name on the command line).

When using the S-PLUS language, the **Script** window is an alternative to the **Commands** window. The **Commands** window is interactive–commands typed in the **Commands** window are evaluated immediately through the interpreter with the output shown below each command. The **Script** window, on the other hand, lets you type a set of commands and functions and evaluates them only on demand. The script can be executed by clicking the **Run** button ▶ on the **Script** window toolbar. If a section of the script is selected (highlighted), only that selection will be executed. The output is shown in the output pane and not below each command. The **Commands** window is preferable for doing interactive exploratory data analysis at the prompt, while the **Script** window is useful for writing longer functions.

THE SCRIPT WINDOW

Any executable statements or commands can be entered into a **Script** window and executed. For example, you could enter the following S-PLUS language expression in a **Script** window:

```
objects()
```

All **Script** windows have an output pane, which contains output from print statements and information about warnings and error messages that occur when running your script. The **Script** window program pane contains a line and column number indicator in the upper left of the window that helps you locate lines in your script when you are editing.

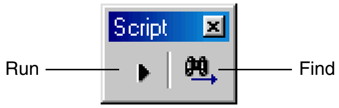


Figure 9.2: *The* ***Script*** *window toolbar.*

Working With Scripts

Scripts can be created or opened, edited, run, saved, and printed.

To create a new script, do the following:

1. From the main menu, choose **File** ▶ **New** or click the **New** button on the **Standard** toolbar. A list of window types pops up.
2. Select **Script File** and click **OK**.

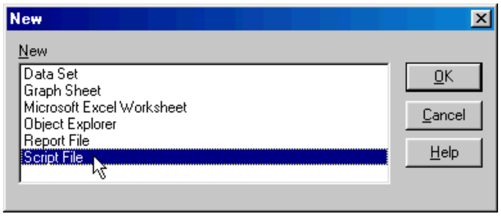


Figure 9.3: *The* ***New*** *dialog can be used to create many file types, including scripts.*

A new script is created and displayed in a window. New scripts are given temporary default names.

You can type commands directly into a **Script** window program pane using commands and expressions in the S-PLUS language. The **Script** window, by default, sends commands to the Spotfire S+ interpreter.

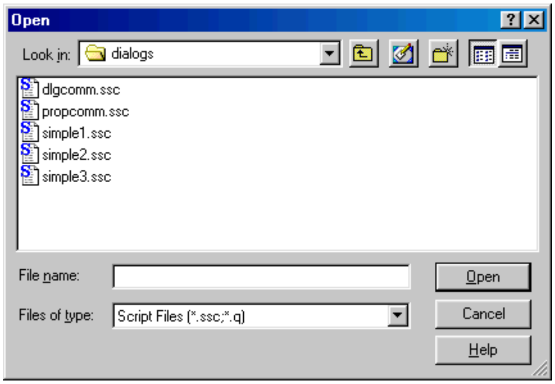
When you click the mouse in the upper pane of the **Script** window, the caption (or title) of the window changes to the name of the script followed by **- program**. As you type in this pane, the line and column number indicators change to reflect where you are editing.

The lower pane is used for script output. When you run your script, all output, such as that from the `print` function, calls commands in your script, and any warnings or errors, normally appears in this output pane (this can be changed through the **Options ▶ Text Output Routing** dialog). When you click the mouse in this pane, the caption of the **Script** window changes to the name of the script followed by **- output**. You can copy text from the output pane into the clipboard, but you cannot enter text.

To open an existing script file, do one of the following:

- Click the **Open** button on the **Standard** toolbar.
- From the main menu, choose **File ▶ Open**.

In the **Open** dialog, select the **Files of type** to be Spotfire S+ **Script Files (*.ssc; *.q)**. Navigate to the folder of your choice, select your script file, and click **Open** to open your script in a new **Script** window.



Look in: dialogs

dlgcomm.ssc
propcomm.ssc
simple1.ssc
simple2.ssc
simple3.ssc

File name:

Files of type: Script Files (*.ssc;*.q)

Figure 9.4: *Opening a script file.*

Running a Script From a Script Window

You can use the **Run** button ▶ or the **Run** menu option to execute your scripts.

To run a script, do one of the following:

- Click the **Run** button ▶ on the **Script** window toolbar.
- From the main menu, choose **Script** ▶ **Run**.

To run a portion of a script, do the following:

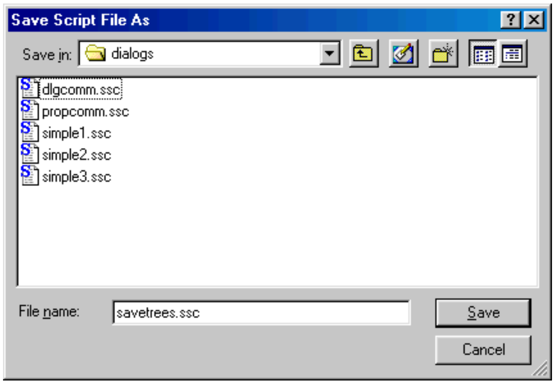
1. Select the lines in the script that you want to run.
2. From the main menu, choose **Script** ▶ **Run** or click the **Run** button ▶ on the **Script** window toolbar.

When you run your script, the **Script** window title changes to the name of the script followed by **running**. When the script is stopped or has ended execution, the title changes back to **program**.

To save a script in a script file, do the following:

1. Click the **Save** button 💾 on the **Standard** toolbar or, from the **File** menu, choose the **Save** or **Save As** menu item, or type CTRL-S.
2. If you choose **Save As**, or if the **Script** window has never been saved before, a browser window will appear.
3. Navigate to the folder of your choice and change the **File name** text field to the file name of your choice, for instance, **savetrees.ssc**.

4. Click **Save** to create a new script file named **savetrees.ssc**.



Save in: dialogs

dlgcomm.ssc
propcomm.ssc
simple1.ssc
simple2.ssc
simple3.ssc

File name: savetrees.ssc

Figure 9.5: *Saving a script file.*

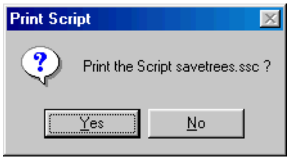
Printing a Script File

To print the contents of a **Script** window, do the following:

1. Select the **Script** window to print.
2. From the **File** menu, choose **Print Script**.
3. Use the common **Print** dialog to specify your print options and click **OK** (the actual **Print** dialog you see will depend on which platform you use and which default printer is currently in use).

You can also print a script as follows:

1. Click the **Print** button 🖨 on the **Standard** toolbar.
2. A dialog will pop up to confirm which **Script** window you want to print:



Print the Script savetrees.ssc ?

3. Click **Yes** to print (using the default printer and default settings) or **No** to abort printing.

Stopping a Script

While running a script or a selected portion of a script, you can usually stop it using the Esc key. This will prevent the script from being evaluated any further.

Interpreting Errors and Warnings

If the interpreter encounters a problem with an expression or a command you enter in a script file, it will display an error or warning in the output pane of the **Script** window. The warning or error message explains the problem and, in some cases, likely causes of the problem. You can then move to this line and edit the script to correct the problem and rerun the script.

Warnings are not considered as serious as errors. Typically, warnings will not stop script execution, whereas errors will.

Selecting Text in a Script Window

You can select all the text in the **Script** window by choosing **Select All** from the **Edit** menu or by pressing CTRL-A.

Clearing, Cutting, Copying, and Pasting Text in a Script Window

You can move text within a **Script** window using the **Cut**, **Copy**, and **Paste** commands in the **Edit** menu, or the **Cut**, **Copy**, and **Paste** buttons on the **Standard** toolbar, or CTRL-X, CTRL-C, and CTRL-V. You can use these commands to move and copy text within the same **Script** window, to another open **Script** window, or between Spotfire S+ and other applications.

Text that you cut or copy is placed on the clipboard. An item placed on the clipboard will remain there until either the **Cut** or **Copy** command is chosen. You can paste text from the clipboard into a **Script** window as many times as you want.

The same techniques used to move and copy text are used to move and copy any item or character.

You can use the **Clear** command in the **Edit** menu (or the DELETE key) to delete text from the **Script** window without keeping a copy of the text on the clipboard.

To move or copy text in a script, do the following:

1. Select the text.
2. Click the **Cut** button ✂ or the **Copy** button ⎘ on the **Standard** toolbar, or choose **Cut** (CTRL-X) or **Copy** (CTRL-C) from the **Edit** menu. This places the text on the clipboard.
3. Position the insertion point in a new location in the **Script** window. Click the **Paste** button 📋 on the **Standard** toolbar or choose **Paste** from the **Edit** menu (CTRL-V).

Using Undo in a Script Window

The **Script** window has its own **Undo** capability, which is separate from the **Undo** used when working with **Graph Sheets** and **Data** windows. While you edit a script, you cannot undo or redo any actions for **Graph Sheets** and data objects. While editing scripts, you can undo your typing changes by choosing **Edit ▶ Undo** from the menus. As soon as you leave the **Script** window, your **Undo** queue for **Graph Sheets** or **Data** windows is restored.

To undo the last change made in a **Script** window, click the **Undo** button on the **Standard** toolbar, or choose **Undo** from the **Edit** menu, or type CTRL-Z.

The last change you made will be undone. If you need to restore the **Script** window to its previous state before your last undo, you can **Undo** again and the change you just undid will be restored.

Using Find and Replace

To review or change text in a **Script** window, use the **Find** or **Replace** options. You can use **Find** to locate specific occurrences of text in your script. You can use **Replace** to locate the text and replace it throughout your script. **Find** and **Replace** can be used for certain words, phrases, or sequences of characters, such as whole commands.

Spotfire S+ will replace specified text throughout a script unless you select a part of the script. It is a good idea to save your script before you use **Replace** so that if you do not like the results, you can close the **Script** window without saving the changes. You can also use **Undo** to undo the last replacement made to the script.

To find text, do the following:

1. Click the **Find** button on the **Script** window toolbar, or choose **Find** from the **Edit** menu, or press CTRL-F. The **Find** dialog will pop up.
2. In the **Find what** box, type the text you're searching for.

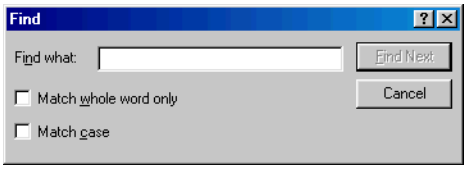


Figure 9.6: *The **Find** dialog will find a string of up to 255 characters; the text will scroll horizontally as you type.*

If you used **Find** or **Replace** in your current work session, the text you last searched for is selected in the **Find what** box. Type over the text to find different text.

3. Choose **Find Next** to begin searching.

The **Find** dialog has the options in Table 9.1.

Table 9.1: *Check box options in the* ***Find*** *and* ***Replace*** *dialogs.*

Option	Purpose
Match whole word only	Choose this option to find whole words, not substrings.
Match case	Choose this option to find only words having the specified pattern of uppercase and lowercase letters.

To find and replace text, do the following:

1. From the **Edit** menu, choose **Replace**, or type CTRL-H. The **Replace** dialog will pop up.
2. In the **Find what** box, type the text you're searching for.
3. If you used **Find** or **Replace** in your current work session, the text you last searched for is selected in the **Find what** box. Type over the text to find different text.

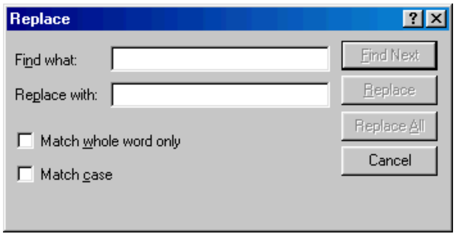


Figure 9.7: *The* ***Replace*** *dialog has the same text length limits as the* ***Find*** *dialog.*

4. In the **Replace with** box, type the replacement text.

   As with the **Find what** box, if you used **Replace with** in your current work session, the replacement characters you last specified are selected in the **Replace with** box. Type over the text to specify different replacement characters.

- Choose **Find Next** to move the cursor to the next occurrence of the word in **Find what**.
- Choose **Replace** to replace the current occurrence of the word in **Find what** with the word in **Replace with**.
- Choose **Replace All** to replace all occurrences of the word in **Find what** with the word in **Replace with**, with no confirmation dialog.

You can also delete text with the **Replace** option. Follow the steps above, but leave the **Replace with** box blank.

Context Sensitive Help

If the cursor is at the beginning, in the middle, or at the end of a word in a **Script** window, pressing the F1 key will pop up help for this word. Specifically, if the word is the name of an S-PLUS function, help will be shown for this function.

SCRIPT WINDOW FEATURES

The **Script** window provides several features designed to simplify typing S-PLUS functions. Each of these features can be enabled or disabled independently of the others.

Automatic Matching of Delimiters

The **Script** window automatically matches braces (`{}`), parentheses (`()`), brackets (`[]`), and single and double quotation marks (`''` and `""`). For example, whenever you type a right parenthesis, the editor automatically highlights the matching left parenthesis. This behavior is the same for braces, brackets, and quotation marks. Delimiter matching helps you ensure that the matches are as you intended.

After you type, say, a right parenthesis, the cursor moves automatically to the matching left parenthesis and highlights it for a predetermined length of time (by default, 0.5 seconds or 500 milliseconds). The cursor then moves to the space following the right parenthesis. Any intervening keystrokes are buffered so that no keystrokes are lost if you keep typing while the matching parenthesis is being highlighted. The length of time for highlighting can be changed.

By default, the **Script** window searches through the entire script to find an automatic match. Since this can be very time consuming for large scripts, you can restrict the search to a specified number of characters.

Automatic Insertion of Right Braces

When automatic insertion of right braces is enabled, pressing ENTER after typing a left brace will result in the automatic insertion of a matching right brace two lines below, and the cursor will be placed on the intervening line.

Automatic Indentation

When automatic indentation is enabled, the editor automatically indents the bodies of function definitions, `if` statements, `for` statements, and `while` statements. By default, the amount of indentation is 4 spaces, but this value can be changed.

The following sample function illustrates the indentation style that is supported:

```
"test1"<-
function(x)
{
    if(x > 0) {
        for(i in 1:x) {
            cat(i, "\n")
            }
        }
    else {
        i <-  - x
        while(i > 0) {
            cat(i, "\n")
            i <- i - 1
        }
    }
}
```

Modifying Script Window Settings

The default settings of the **Script** window can be changed by means of the **Script** dialog, accessed by right-clicking in a **Script** window and selecting **Properties** from the pop-up menu.

To disable any of the following properties, deselect the appropriate check box:

- **Output Pane Word Wrap**
- **Auto Match : {}, (), [], " " and ' '**
- **Auto Indent**
- **Auto Insert Right Brace**

To change the **Tab Size**, enter the number of spaces desired in the corresponding text box.

To change the amount of time that matching delimiters are highlighted, change the value (shown in milliseconds) in the **Match Time (msec)** text box.

To change the number of characters searched for an automatic match, enter a value in the **Match CharLimit** text box. The default value **-1** means to search from the cursor to the top of the file.

The properties of a **Script** window can also be accessed from the **Object Explorer**. To do this, right-click the appropriate script in the right pane and select **Properties** from the pop-up menu.

To save the desired settings as defaults for future **Script** window sessions, select **Options ► Save Window Size/Properties as Default**.

TIME-SAVING TIPS FOR USING SCRIPTS

Spotfire S+ provides several methods for writing scripts. The easiest is to open a new **Script** window and type in commands and execute them. Other ways to generate scripts include using the **History Log** and the menus or dragging objects into a **Script** window to record the commands that create or modify these objects. This section discusses how to view the **History Log**, how to generate a given plot using S-PLUS language commands, and how to edit an S-PLUS function's definition using a **Script** window. You can drag-and-drop other object types from the **Object Explorer** into a **Script** window, including toolbars, menu items, `ClassInfo` objects, and `FunctionInfo` objects.

History Log

Spotfire S+ keeps a continuous record, or history, of menu, toolbar, and dialog operations. Visual edits, such as changing cells in **Data** windows or repositioning an object on a **Graph Sheet**, are also recorded, as are commands issued in the **Commands** window. The S-PLUS programming language equivalents of these operations are recorded in the **History Log**.

You can view the **History Log** in a **Script** window.

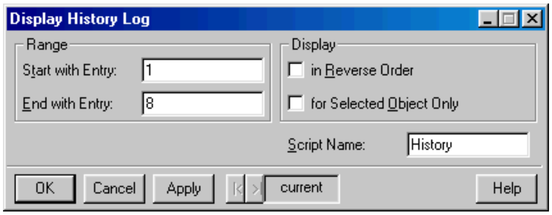
In order to record dialog operations in the **History Log**, you must use the **OK** or **Apply** buttons in the dialog to accept your changes. If you choose **Cancel** or press ESC from the dialog, the command that corresponds to the dialog is not recorded in the **History Log**.

You can edit lines in the **History Log** just as you would any other script. These edits do not modify the **History Log** itself; they only modify the copy in this **Script** window. You can cut and paste parts of the script into other scripts, execute portions of the script, execute the entire script, and save the script to a file.

The maximum size of the **History Log** (the total number of operations recorded) can be specified in the **History Entries** field of the **Undo & History** dialog available through the **Options** menu.

To view the current **History Log** in a **Script** window, do the following:

1. Click the **History Log** button on the **Standard** toolbar to display the **History Log** with default settings or, from the **Window** menu, choose **History**, then **Display**. The **Display History Log** dialog appears.



Display History Log

Range

Start with Entry: 1

End with Entry: 8

Display

□ in Reverse Order

□ for Selected Object Only

Script Name: History

Figure 9.8: *The **Display History Log** dialog.*

2. Specify any desired display options.
3. Click **OK** to display the **History Log**.

Table 9.2: *Options in the **Display History Log** dialog.*

Field	Description
Start with Entry **End with Entry**	Specify the starting and ending entry numbers to be displayed in the **History Log**. This lets you control the number of **History Entries** and which ones get placed in the **History Log**.
Display in Reverse Order	Choose to display the **History Entries** in the reverse order in which they were generated. You will see the command executed most recently at the top of the script.
Display for Selected Object Only	Choose to have the script contain **History Entries** for the selected object only. This is useful when you want to focus on the commands for a specific object. For example, if you select a symbol, the script will contain all the entries related to creating and modifying the symbol.

Table 9.2: *Options in the* ***Display History Log*** *dialog. (Continued)*

Field	**Description**
Script Name	Specify a name for the script that will contain the **History Log**. This is optional; the default script name is **History**.

To execute recorded commands in the **History Log**:

1. Use the mouse to highlight the **History Entries** you want to execute.
2. Click the **Run** button ▶ on the **Script** window toolbar or choose **Run** from the **Script** menu.

You can also cut, paste, and save these commands to another script file.

You should clear the **History Log** before you start recording steps. This will save editing time later and make it clearer what commands were generated by the actions you made in the menus and dialogs. To clear the **History Log,** from the **Window** menu, choose **History**, then choose **Clear** from the submenu.

Condensed vs. Full

By default, the **History Log** is written in a condensed form that shows the main commands with required inputs and only those optional inputs that differ from their default values. You can ask Spotfire S+ to show a full history with each command and all its parameters, including defaults. The full history is useful, for example, if you want a record of exactly which options were used to create a specific plot. If you are using the **History Log** to learn how to create Spotfire S+ graphics from a script or in the **Commands** window, the condensed form will be more useful to you.

To choose the type of **History Log**, do the following:

1. From the main menu, choose **Options ▶ Undo & History**.
2. Select **Condensed** or **Full** from the **History Type** dropdown list.

Dragging Graph Objects Into a Script Window

Another way to create scripts is to drag objects from a graph, such as plots or extra symbols, into a **Script** window. If you want to know which S-PLUS language commands are used to create or modify a particular editable plot, you can drag it into a **Script** window, and the S-PLUS command to create it will be written there automatically. You can then run the generated script to create or modify the plot. This is an alternative to using menu options and dialogs to create or modify.

To drag a graph object into a **Script** window, do the following:

1. Click the **New** button 🗋 on the **Standard** toolbar and select **Graph Sheet** from the list.
2. Open the **Annotation** palette and drag a filled rectangle onto your **Graph Sheet**.
3. Create a new **Script** window by clicking on the **New** button 🗋 on the **Standard** toolbar, this time selecting **Script File** from the list.
4. You may want to vertically tile the **Script** window and the **Graph Sheet**–this makes it easier to select and drag objects between the two. To tile the windows, choose **Window** ▶ **Tile Vertical** from the main menu.
5. Select the rectangle from the graph and drag it into the upper pane (the program pane) of the **Script** window.

Note

As you drag the mouse, the cursor changes into a "drop" cursor. When the mouse is inside the program pane, you will see a gray vertical marker line at the left-most edge of the line you are over. This indicates where the commands will be inserted in the script when you release the mouse. When you release the mouse, the commands will be written into the **Script** window, starting at the line where you dropped the objects.

6. Delete the rectangle on your **Graph Sheet**.
7. In your script, change the `FillColor` from `"Red"` to `"Blue"`.
8. Press the **Run** button ▶ on the **Script** toolbar. A rectangle appears in your **Graph Sheet**, this time blue.

For more information on programming editable graphics, see Chapter 6, Editable Graphics Commands, in the *Guide to Graphics*.

Dragging Function Objects Into a Script Window

If you drag an S-PLUS function object from an **Object Explorer** window onto a **Script** window, the function definition is expanded in the **Script** window. This is a very convenient shortcut to edit a function's body. If you want to test your changes, select **Run** in the **Script** menu, or click the **Run** button ▶, and the new function definition is automatically sent to the Spotfire S+ interpreter.

THE REPORT WINDOW

The **Report** window is similar to the **Script** window. They both are primarily text windows that can be opened and saved via the **File** menu, and both are editable. Unlike the **Script** window, the **Report** window does not deal with programs or scripts. The **Report** window is a placeholder for the text output resulting from any operation in Spotfire S+. (You must select the **Report** window as your preference for text output. See the sections below on redirecting text output for how to set this option.)

Text in the **Report** window is editable. The **Report** window toolbar, shown in Figure 9.9, allows you to modify the size, font, and style of text that appears in a Spotfire S+ report.

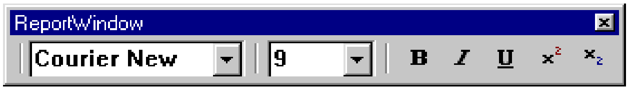


Figure 9.9: *The **Report** window toolbar.*

In addition to basic editing features such as cut, copy, and paste, the **Report** window supports the following operations.

- Typing from the keyboard, point-and-click, highlight-drag-and-drop, etc.
- **Undo**, **Cut**, **Copy**, **Paste**, **Find**, **Replace**, and so on are supported via the **Edit** menu and context sensitive menu (right-click).
- Pasting from the clipboard (including graphics and other OLE objects) is supported for RTF files only. In particular, if you attempt to save the **Report** window as a text file and have graphical images pasted in it, the graphics will not be saved and you will not get an error message.
- Fonts are supported via the context sensitive menu (right-click) and the **Format** menu. Fonts are supported in RTF mode only.
- User input via the keyboard may go through the **Report** window (trickling input).

The **Report** window is saved by default in Rich Text Format (**.rtf**). Reports may also be saved in plain-text (**.txt**) format or with a **.srp** extension (the extension that was used in earlier versions of Spotfire S+).

Plain text can be used with the widest variety of programs and is relatively fast; RTF has more capability, but RTF files are bigger and slower than their plain-text counterparts.

- To save a **Report** window, choose **File** ▶ **Save** or **Save As** from the main menu.
- To create a new **Report** window, choose **File** ▶ **New** from the main menu, select **Report File**, and click **OK**. A new **Report** window will appear.
- To open an RTF file in a **Report** window, choose **File** ▶ **Open** from the main menu, select the desired file, and click **OK**.

PRINTING A SCRIPT OR REPORT

To print a **Script** or **Report** in Spotfire S+, you can use the Windows-standard **Print** button 🖨 or the **Print Script** or **Print Report** option in the **File** menu.

To print using the **Print** button, click the **Print** button 🖨 on the **Standard** toolbar. A dialog appears asking you to confirm your print choice.

To print using the **Print** dialog, do the following:

1. From the main menu, choose **File ▶ Print Script** or **File ▶ Print Report**. The **Print** dialog appears.
2. In the **Print** dialog, choose the options that you want. See the online help for a description of the options.
3. Click **OK** to start printing.

USING SPOTFIRE S+ WITH OTHER APPLICATIONS

10

USING SPOTFIRE S+ WITH MICROSOFT EXCEL

There are two different ways in which you can use Spotfire S+ with Microsoft Excel:

- The Excel Link Wizards give you the ability to plot or analyze data stored in an Excel worksheet from within Spotfire S+ by establishing a *link* between the worksheet and an S-PLUS data frame.
- The Excel add-in application allows you to create and modify Spotfire S+ graphs from within Excel.

Linking Data Between Excel and Spotfire S+

If you have Microsoft Excel 2000 or later installed on your computer, you can create, open, and save Excel worksheets from within Spotfire S+. Then, by creating a link between a specific cell range in Excel and a data frame in Spotfire S+, you can use the data stored in the Excel worksheet to create graphics or perform statistical analyses in Spotfire S+.

Creating or Opening an Excel Worksheet

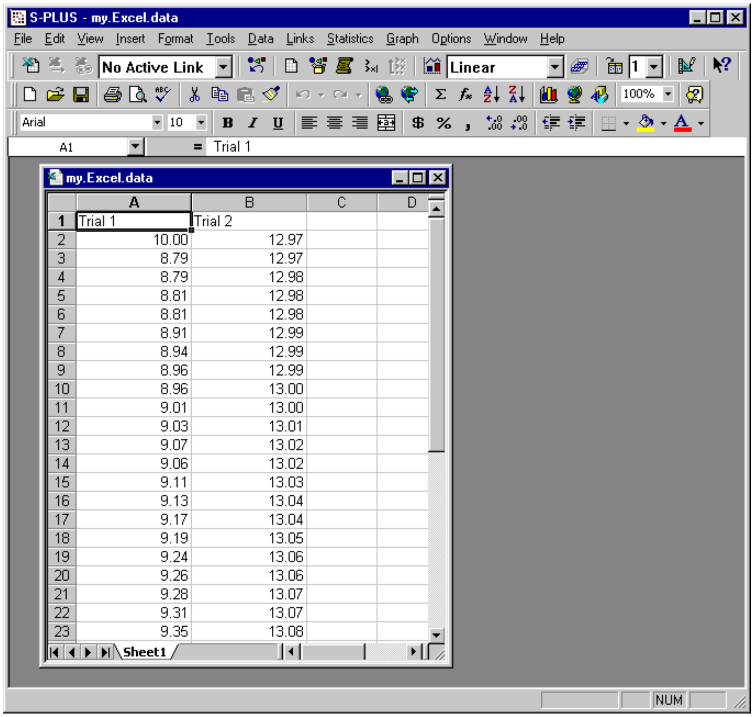
To create an Excel worksheet from within Spotfire S+, do the following:

1. Click the **New** button 🗋 on the **Standard** toolbar or choose **File ▶ New** from the main menu.
2. In the **New** dialog, select **Microsoft Excel Worksheet** and click **OK**.

To open an Excel worksheet from within Spotfire S+, do the following:

1. Click the **Open** button 📂 on the **Standard** toolbar or choose **File ▶ Open** from the main menu.
2. In the **Open** dialog, select **Excel WorkSheets** (***.xls or *.xlsx**) from the **Files of type** dropdown list, navigate to the desired Excel file, and click **Open**.

When you create or open an Excel worksheet, it is displayed in a window inside Spotfire S+, as shown in Figure 10.1. Because this window is actually Excel embedded inside Spotfire S+, it gives you all the functionality you expect in Excel.



	A	B	C	D
1	Trial 1	Trial 2		
2	10.00	12.97		
3	8.79	12.97		
4	8.79	12.98		
5	8.81	12.98		
6	8.81	12.98		
7	8.91	12.99		
8	8.94	12.99		
9	8.96	12.99		
10	8.96	13.00		
11	9.01	13.00		
12	9.03	13.01		
13	9.07	13.02		
14	9.06	13.02		
15	9.11	13.03		
16	9.13	13.04		
17	9.17	13.04		
18	9.19	13.05		
19	9.24	13.06		
20	9.26	13.06		
21	9.28	13.07		
22	9.31	13.07		
23	9.35	13.08		

Figure 10.1: *A sample Excel worksheet opened in Spotfire S+.*

When an Excel worksheet is in focus, the Spotfire S+ **Standard** toolbar is replaced by the **Excel Sheet** toolbar, which contains most of the buttons available on the **Standard** toolbar plus a new section dedicated to Excel, as shown in Figure 10.2. The familiar Excel toolbar appears beneath the new **Excel Sheet** toolbar. Note also that the **View**, **Insert**, **Format**, **Tools**, and **Data** menus are provided by Excel.

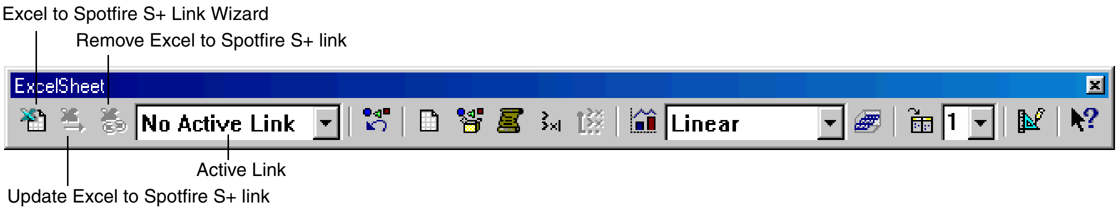

Excel to Spotfire S+ Link Wizard
Remove Excel to Spotfire S+ link
ExcelSheet
No Active Link
Linear
1
Active Link
Update Excel to Spotfire S+ link

Figure 10.2: *The* ***Excel Sheet*** *toolbar.*

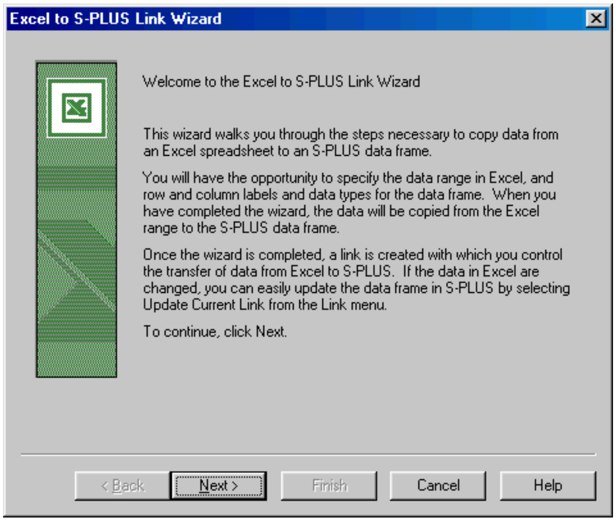
Using the Excel to Spotfire S+ Link Wizard

Before you can use Spotfire S+ to plot or analyze data stored in an Excel worksheet, you must first get the data into an S-PLUS data frame. This is done by using the **Excel to Spotfire S+ Link Wizard** to establish a link from a region in an Excel worksheet to a data frame in Spotfire S+.

To create a link from Excel to Spotfire S+, do the following:

1. Select the region in your Excel worksheet that you want to plot or analyze in Spotfire S+. This region can contain data only or can include column and/or row labels.

2. Click the **Excel to Spotfire S+ Link Wizard** button on the **Excel Sheet** toolbar or choose **Links ▶ Link Wizard** from the main menu. The **Excel to Spotfire S+ Link Wizard** opens, as shown in Figure 10.3.



Excel to S-PLUS Link Wizard

Welcome to the Excel to S-PLUS Link Wizard

This wizard walks you through the steps necessary to copy data from an Excel spreadsheet to an S-PLUS data frame.

You will have the opportunity to specify the data range in Excel, and row and column labels and data types for the data frame. When you have completed the wizard, the data will be copied from the Excel range to the S-PLUS data frame.

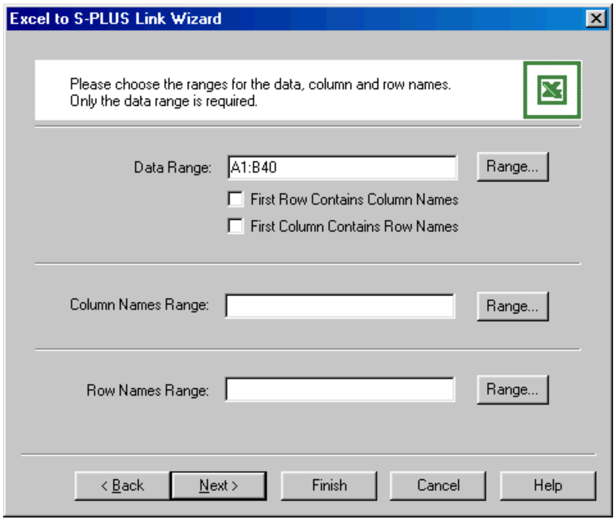
Once the wizard is completed, a link is created with which you control the transfer of data from Excel to S-PLUS. If the data in Excel are changed, you can easily update the data frame in S-PLUS by selecting Update Current Link from the Link menu.

To continue, click Next.

Figure 10.3: *The **Excel to Spotfire S+ Link Wizard**.*

3. Click **Next**.

4. As you can see in Figure 10.4, the range you selected in the Excel worksheet before starting the wizard automatically appears in the **Data Range** field.



Please choose the ranges for the data, column and row names.
Only the data range is required.

Data Range: A1:B40

☐ First Row Contains Column Names

☐ First Column Contains Row Names

Column Names Range:

Row Names Range:

Figure 10.4: *Specifying a data range in the wizard.*

Hint

When your selection includes data only, Spotfire S+ tries to find suitable column and row labels near the data region you select in your worksheet; you can modify or delete these if you wish. Alternatively, if you use the CTRL key to select two or three noncontiguous regions in your worksheet prior to starting the wizard, Spotfire S+ uses these additional regions for column and/or row names. Finally, you can tell Spotfire S+ that all your selections will include column and/or row names by specifying this as the default behavior. For details, see Chapter 11, Customizing Your Spotfire S+ Session.

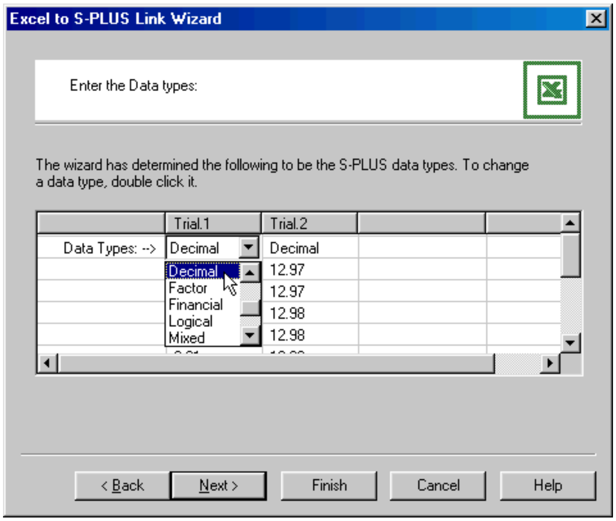
- If you want to change your selection, click the **Range** button to the right of the **Data Range** field, select a different range, and click **OK** in the dialog prompt.
- If the range you selected includes column and/or row names, select the **First Row Contains Column Names** check box and/or the **First Column Contains Row Names** check box, as appropriate.

- If the range you selected includes only data but you would now like to specify column (or row) names, click the **Range** button to the right of the **Column Names Range** (or **Row Names Range**) field, select a different range, and click **OK** in the dialog prompt.

Note

The wizard converts column labels to legal Spotfire S+ variable names. Row labels are used for annotations in Spotfire S+ plots.

5. Click **Next**.
6. The second page of the wizard gives you an idea of what the S-PLUS data frame will look like (see Figure 10.5).



Enter the Data types:

The wizard has determined the following to be the S-PLUS data types. To change a data type, double click it.

	Trial.1	Trial.2		
Data Types: -->	Decimal	Decimal		
		12.97		
		12.97		
		12.98		
		12.98		

Figure 10.5: *Selecting a different column type.*

The wizard attempts to "guess" what the column types in the data frame should be. If a guess is incorrect, you can change it by clicking the cell containing the incorrect column type and selecting a different type from the dropdown list that appears.

Note

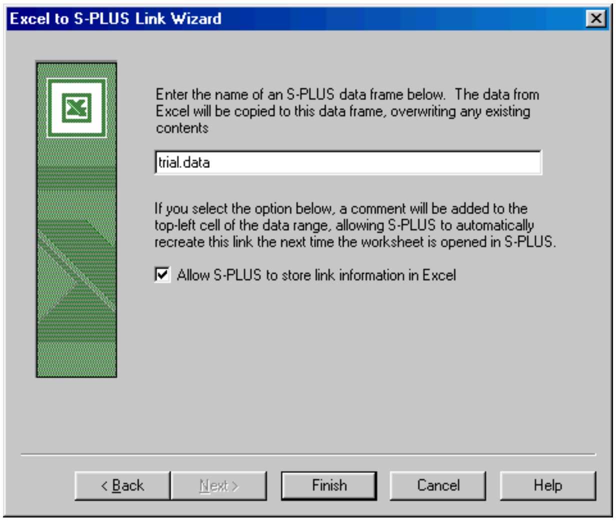
The wizard examines the first cell in a column to determine that column's data type. If the first cell in the column is #N/A or is empty, the wizard then loops over the rest of the column looking for a real value. If such a value is found, its type becomes the data type for the column. If only #N/A or empty cells are found, the wizard sets the column type to character.

Table 10.1 below lists the Excel data types alongside their equivalents in S-PLUS.

Table 10.1: *Excel data types and S-PLUS equivalents.*

Excel Data Type	S-PLUS Equivalent
General	Character
Number	Complex
Currency	Currency
Accounting	Date
Date	Date & Time
Time	Decimal
Percent	Factor
Fraction	Financial
Scientific	Logical
Text	Mixed
Special	Number
Custom	Scientific
	Time

7. Click **Next**.
8. As shown in Figure 10.6, the final page of the wizard asks you to specify a name for the new S-PLUS data frame. Type the name of your choice in the text box and click **Finish** to close the wizard and create the link from Excel to Spotfire S+.



Enter the name of an S-PLUS data frame below. The data from Excel will be copied to this data frame, overwriting any existing contents

trial.data

If you select the option below, a comment will be added to the top-left cell of the data range, allowing S-PLUS to automatically recreate this link the next time the worksheet is opened in S-PLUS.

☑ Allow S-PLUS to store link information in Excel

Figure 10.6: *Naming the new data frame in Spotfire S+.*

Hint

If you are working with the same Excel worksheet regularly and do not want to go through the process of creating a link using the wizard each time, you can allow Spotfire S+ to store information in Excel that will allow the link to be recreated automatically each time you open the Excel worksheet in Spotfire S+. This works by adding a comment to the top left cell of your region (shown as a little red triangle in the upper right corner of the cell) and will not harm your data. If you do not want Spotfire S+ to modify the Excel file in any way, clear the **Allow Spotfire S+ to store link information in Excel** check box on this page. To turn off this default behavior, choose **Options ▶ General Settings** from the main menu, click the **Data** tab, and clear the **Save link information** check box in the **Excel Link** group.

The following two things have just occurred:

- The data region you selected in Excel has been *copied* to an S-PLUS data frame.

- A *link* has been created, enabling you to easily update the data frame in Spotfire S+ when the data in Excel change.

Hint

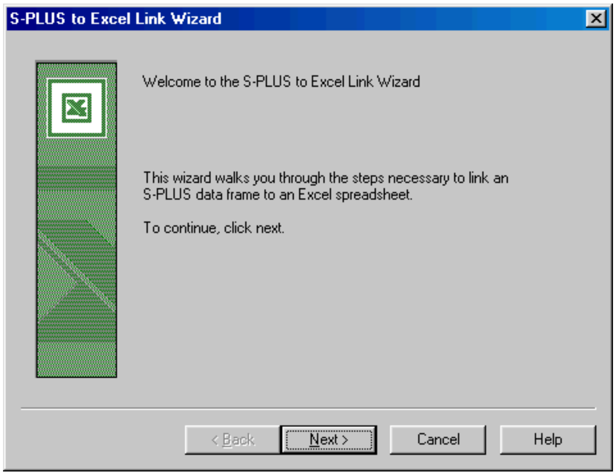
You can create a “quick link” without explicitly establishing a link using the **Excel to Spotfire S+ Link Wizard**. To do so, simply click a button on a plot palette or choose an option from the **Statistics** menu while your Excel worksheet is the active document and a range is selected. Spotfire S+ automatically creates the link for you with a default name and default column and row labels.

Using the Spotfire S+ to Excel Link Wizard

If you have data stored in an S-PLUS data frame that you would prefer to store in an Excel worksheet but still be able to plot or analyze in Spotfire S+, you can use the **Spotfire S+ to Excel Link Wizard** to establish a link from the data frame in Spotfire S+ to an Excel worksheet.

To create a link from Spotfire S+ to Excel, do the following:

1. Create a new Excel worksheet from within Spotfire S+.
2. With the **Data** window displaying your S-PLUS data frame in focus, click the **Spotfire S+ to Excel Link Wizard** button on the **Data** window toolbar or choose **Link Wizard** from the **Edit** or shortcut menu. The **Spotfire S+ to Excel Link Wizard** opens, as shown in Figure 10.3.



S-PLUS to Excel Link Wizard

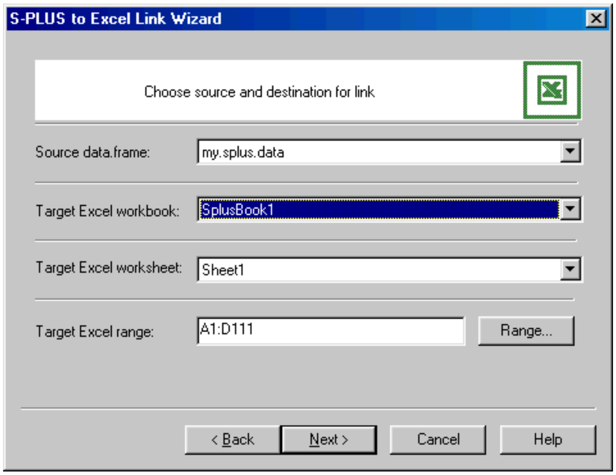
Welcome to the S-PLUS to Excel Link Wizard

This wizard walks you through the steps necessary to link an S-PLUS data frame to an Excel spreadsheet.

To continue, click next.

Figure 10.7: *The **Spotfire S+ to Excel Link Wizard**.*

3. Click **Next**.
4. As you can see in Figure 10.8, the **Source data.frame** field is automatically filled in with the name of the active data frame. Select your newly created Excel workbook from the **Target Excel Workbook** dropdown list; notice that the **Target Excel worksheet** and **Target Excel range** fields are automatically filled in.


S-PLUS to Excel Link Wizard
Choose source and destination for link
Range...
< Back
Next >
Cancel
Help

Source data.frame: my.splus.data

Target Excel workbook: SplusBook1

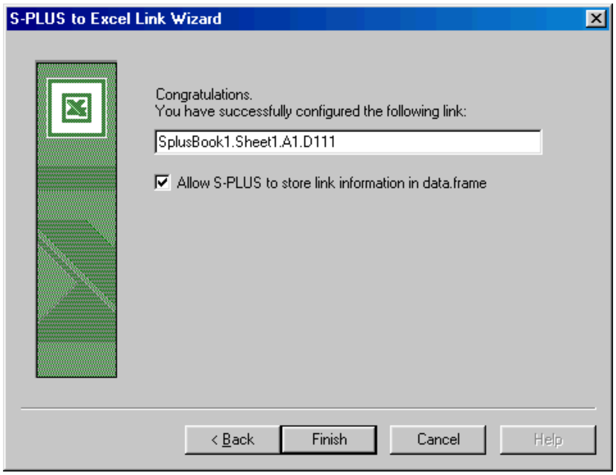
Target Excel worksheet: Sheet1

Target Excel range: A1:D111

Figure 10.8: *Specifying an Excel target in the wizard.*

- If you want to change your selection, click the **Range** button to the right of the **Target Excel range** field, select a different range, and click **OK** in the dialog prompt.

5. Click **Next**.
6. Figure 10.9 shows the last page of the wizard. Spotfire S+ automatically generates a default name of the form **SplusBook1.Sheet1.A1.D111** for the link. If you prefer, you can type a different name for the new link in the text box.
7. Click **Finish** to close the wizard and create the link from Spotfire S+ to Excel.



Congratulations.
You have successfully configured the following link:

SplusBook1.Sheet1.A1.D111

☑ Allow S-PLUS to store link information in data.frame

Figure 10.9: *The final page of the wizard.*

Hint

If you are working with the same S-PLUS data frame regularly and do not want to go through the process of creating a link using the wizard each time, you can allow Spotfire S+ to store information in the data frame that will allow the link to be recreated automatically each time you open it. This works by adding an attribute to the data frame and will not harm your data. If you do not want Spotfire S+ to modify the data frame in any way, clear the **Allow Spotfire S+ to store link information in data.frame** check box on this page. To turn off this default behavior, choose **Options ▶ General Settings** from the main menu, click the **Data** tab, and clear the **Save link information** check box in the **Excel Link** group.

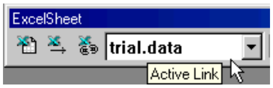
The following two things have just occurred:

- The active S-PLUS data frame has been *copied* to the newly created Excel worksheet.
- A *link* has been created, enabling you to easily update the Excel worksheet when the data in Spotfire S+ change.

Analyzing Excel Data in Spotfire S+

To analyze a region of Excel data that has been linked to a data frame in Spotfire S+, do the following:

1. Select the Excel region you want to work with by selecting the name of the S-PLUS data frame from the **Active Link** dropdown list on the **Excel Sheet** toolbar.



2. Create a graph of the data by clicking a button on a plot palette or perform a statistical analysis by choosing an option from the **Statistics** menu.

Updating Linked Data

Updating an S-PLUS data frame linked to an Excel worksheet

If the data in Excel change, the corresponding S-PLUS data frame is not automatically updated to reflect those changes. You can force the data to be recopied from Excel to Spotfire S+ by doing the following:

1. Select the name of the S-PLUS data frame from the **Active Link** dropdown list on the **Excel Sheet** toolbar.

2. Click the **Update Excel to Spotfire S+ Link** button on the **Excel Sheet** toolbar.

Note

When you click the **Update Excel to Spotfire S+ Link** button, the Excel data are copied to the S-PLUS data frame you specified, using the same data range, column headings, and data types as you specified in the wizard. Note that if you change the dimensions of the Excel region (for example, by adding extra columns and/or rows), you must update the link.

Updating an Excel worksheet linked to an S-PLUS data frame

If the data in Spotfire S+ change, the corresponding Excel worksheet is not automatically updated to reflect those changes. You can force the data to be recopied from Spotfire S+ to Excel by doing the following:

1. Select the name of the Excel link from the **Active Link** dropdown list on the **Data** window toolbar.

2. Click the **Update Current Link** button on the **Data** window toolbar.

Saving Data

When you close an Excel worksheet, Spotfire S+ prompts you to save your Excel data in a file. In the case of Excel data linked to an S-PLUS data frame, the data frame will be deleted automatically by default, although it will be recreated when you next open the Excel worksheet in Spotfire S+. If you prefer, you can change this default behavior through the **Data** tab of the **Options ▶ General Settings** dialog. For details, see Chapter 11, Customizing Your Spotfire S+ Session.

Removing Links

Removing an Excel to Spotfire S+ link

To remove the link from an Excel region to its corresponding S-PLUS data frame, do the following:

1. Select the name of the S-PLUS data frame from the **Active Link** dropdown list on the **Excel Sheet** toolbar.

2. Click the **Remove Excel to Spotfire S+ Link** button on the **Excel Sheet** toolbar.

Note that removing a link also removes the corresponding comment in Excel.

Removing a Spotfire S+ to Excel link

To remove the link from an S-PLUS data frame to its corresponding Excel worksheet, do the following:

1. Select the name of the Excel link from the **Active Link** dropdown list on the **Data** window toolbar.

2. Click the **Remove Current Link** button on the **Data** window toolbar.

Note that removing a link also removes the corresponding attribute in the S-PLUS data frame.

Using the Excel Add-In Application

The Microsoft Excel add-in application makes it easy to create and modify Spotfire S+ graphs from within Excel. This add-in includes the ability to create Spotfire S+ graphs from selected data, to modify the layout of a Spotfire S+ graph embedded in Excel, and to modify the properties of a plot in an embedded Spotfire S+ graph in Excel. A helpful wizard guides you through the process of selecting data, choosing a Spotfire S+ graph and plot type, and creating the graph in Excel, much like Excel's Chart Wizard.

Installing the Excel Add-In

During a **Typical** installation of Spotfire S+, Setup examines your system for the necessary version of Microsoft Excel and, if detected, automatically installs the Excel add-in.

Note

To disable the automatic installation of the Excel add-in during Setup, choose the **Custom** install option and clear **Excel Add-in** from the list of components to install.

Note

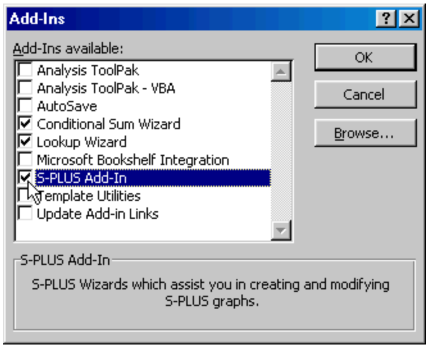
The menu options and user interface you see in Microsoft Excel will be determined by the version of that application you are running.

If you choose not to install the Excel add-in during the installation of Spotfire S+, you can install it at any later time by running Setup, choosing the **Custom** install option, and selecting **Excel Add-in** from the list of components to install.

If the Excel add-in is installed on your computer but the **Spotfire S+** menu and toolbar do not appear in Excel, you can enable the add-in from within Excel. To do so, follow these steps:

1. Start Excel.
2. Create a new worksheet if one does not already exist.
3. From the **Tools** menu, choose **Add-Ins**.

4. In the **Add-Ins** dialog, select the **Spotfire S+ Add-In** check box, as shown in Figure 10.10, and click **OK**.



Add-Ins available:

□ Analysis ToolPak
□ Analysis ToolPak - VBA
□ AutoSave
☑ Conditional Sum Wizard
☑ Lookup Wizard
□ Microsoft Bookshelf Integration
☑ S-PLUS Add-In
□ Template Utilities
□ Update Add-in Links

S-PLUS Add-In

S-PLUS Wizards which assist you in creating and modifying S-PLUS graphs.

Figure 10.10: *The **Add-Ins** dialog in Excel with the **Spotfire S+ Add-In** checked.*

Removing the Excel Add-In

If you choose to remove the Excel add-in, you can do so either by running Spotfire S+ Setup or by removing the add-in from within Excel.

To remove the Excel add-in using Spotfire S+ Setup, do the following:

1. Run Spotfire S+ Setup, choosing the **Modify** option.
2. Select **Excel Add-in** from the list of components.
3. Follow the on-screen instructions.

Note

If you install the Excel add-in during the installation of Spotfire S+ and later remove Spotfire S+, the Excel add-in is removed automatically.

To disable the Excel add-in from within Excel, do the following:

1. Start Excel.
2. Create a new worksheet if one does not already exist.
3. From the **Tools** menu, choose **Add-Ins**.
4. In the **Add-Ins** dialog, clear the **Spotfire S+ Add-In** check box (see Figure 10.10.) and click **OK**.

Using the Excel Add-In

With the Excel add-in installed, whenever you have a worksheet in focus in Excel, a **Spotfire S+** menu and toolbar appear, as shown in Figure 10.11.

The menu and toolbar give you the following options:

- **Create Graph**
- **Modify Graph Layout**
- **Modify Plots**

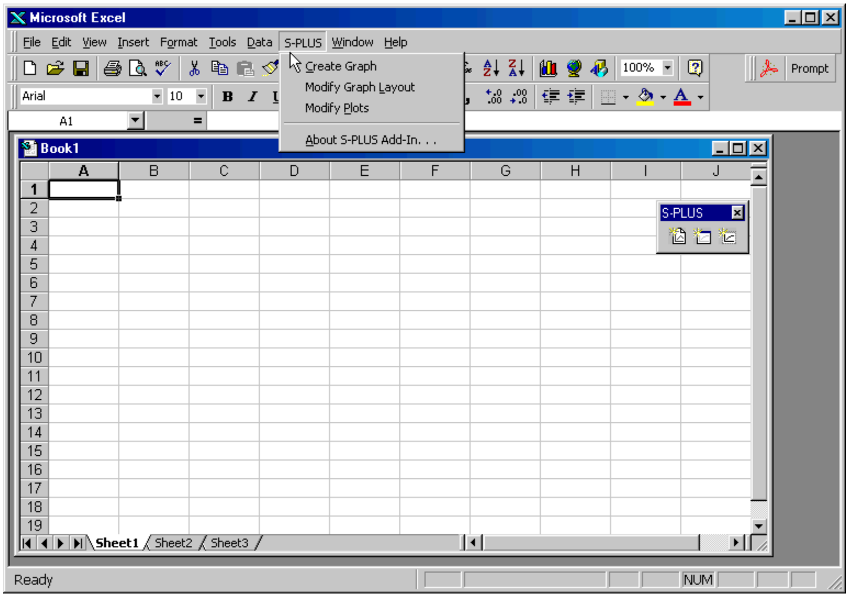


Figure 10.11: *The **Spotfire S+** menu and toolbar for the Excel add-in.*

Creating a graph

To create a new Spotfire S+ graph with the currently selected data in the current worksheet, do the following:

1. Select blocks of data in the current worksheet you want to graph.
2. Click the **Create Graph** button on the **Spotfire S+** toolbar or choose **Spotfire S+ ▶ Create Graph** from the Excel main menu.

3. Follow the instructions in the **Create Spotfire S+ Graph** wizard to create the graph.

Modifying a graph layout

To modify the layout properties of the currently selected Spotfire S+ graph, do the following:

1. Select a Spotfire S+ graph in your worksheet by clicking once on it. (If you double-click on a graph, you will activate it and start editing in place.)
2. Click the **Modify Graph Layout** button on the **Spotfire S+** toolbar or choose **Spotfire S+ ▶ Modify Graph Layout** from the Excel main menu.
3. A Spotfire S+ **Graph Sheet** dialog opens in Excel, allowing you to modify the layout properties of this graph.

Modifying a plot

To modify the properties of a plot in the currently selected Spotfire S+ graph, do the following:

1. Select a Spotfire S+ graph in your worksheet by clicking once on it.
2. Click the **Modify Plots** button on the **Spotfire S+** toolbar or choose **Spotfire S+ ▶ Modify Plots** from the Excel main menu.
3. A dialog opens, showing you a list of the graph areas in this graph (you can have multiple graph areas in a graph, that is, one graph area might be 2D and another might be 3D in the same graph) and, for each graph area, a list showing all the plots in this graph area.
4. Select the graph area and the plot in this area that you want to edit and then click **Next**.
5. A Spotfire S+ plot properties dialog opens in Excel, allowing you to modify the properties of this plot.

Selecting data for graphs

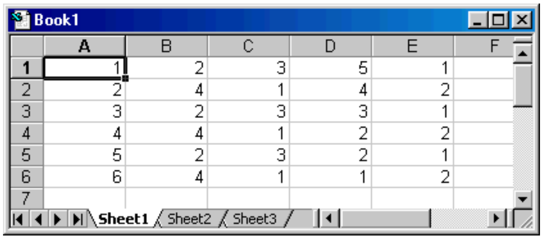
Before you can create a graph, you must first select some data in your current worksheet. You must select a block of data that is greater than one cell in width or length before you can continue with the **Create Spotfire S+ Graph** wizard.

Spotfire S+ plots accept data in a variety of formats. Some plots require at least three columns of data, with the three columns being interpreted as *x*, *y*, and *z* data values. Other plots require at least four columns of data, with the four columns being interpreted as *x*, *y*, *z*, and *w* data values. The list of plot types on the last page of the **Create Spotfire S+ Graph** wizard indicates what kind of data specification is required. If no *x*, *y*, *z*, or *w* specification is shown for a plot type in the list, that means it accepts *x* single or multiple columns or *x* and *y* data with single or multiple columns.

Warning

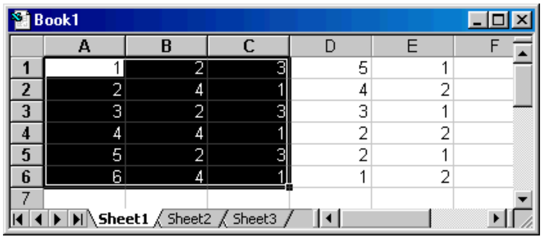
Typically you should not select an entire column in Excel as part of a data specification for a Spotfire S+ graph because Excel sends all rows of this column to Spotfire S+ for graphing, even if the rows are empty. This may cause errors in Spotfire S+ or a failure to create the graph.

The Excel add-in fully supports multiple column and row selections and noncontiguous block selections in Excel to specify data for a Spotfire S+ graph. For example, consider the following data in Excel:



	A	B	C	D	E	F
1	1	2	3	5	1	
2	2	4	1	4	2	
3	3	2	3	3	1	
4	4	4	1	2	2	
5	5	2	3	2	1	
6	6	4	1	1	2	
7						

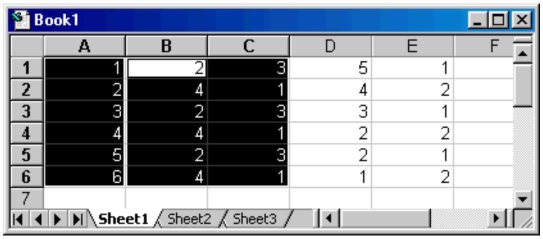
If you want to create two line plots in a graph, you can select the data:



	A	B	C	D	E	F
1	1	2	3	5	1	
2	2	4	1	4	2	
3	3	2	3	3	1	
4	4	4	1	2	2	
5	5	2	3	2	1	
6	6	4	1	1	2	
7						

The **Create Spotfire S+ Graph** wizard treats the **A** column in this selection as the *x* data and the **B** and **C** columns as the *y* data. In this case, two line plots are created, the first with *x* data as the **A** column and *y* data as the **B** column and the second with *x* data as the **A** column and *y* data as the **C** column.

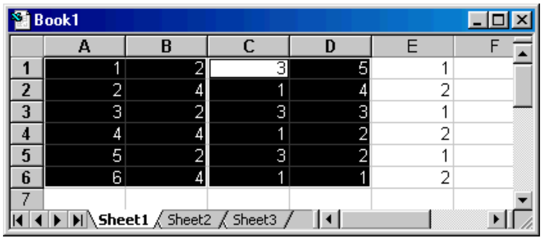
You can also select the same data using noncontiguous column selection:



	A	B	C	D	E	F
1	1	2	3	5	1	
2	2	4	1	4	2	
3	3	2	3	3	1	
4	4	4	1	2	2	
5	5	2	3	2	1	
6	6	4	1	1	2	
7						

In this example, rows **1** through **6** in column **A** are first selected; then the CTRL key is held down and the block from **B1** to **C6** is selected. This selection produces the same graph with two plots as in the first example.

If a plot expects only one column of data for a given dimension, such as the *x* data for a line plot, and more than one column is included in the selection, only the first column in the selection is sent to Spotfire S+ to make the graph. For example, using the above data, you select the blocks **A1:B6** and **C1:D6**:



	A	B	C	D	E	F
1	1	2	3	5	1	
2	2	4	1	4	2	
3	3	2	3	3	1	
4	4	4	1	2	2	
5	5	2	3	2	1	
6	6	4	1	1	2	
7						

The **Create Spotfire S+ Graph** wizard sends **A1:A6** as the *x* data and **C1:D6** as the *y* data to create two line plots.

Selecting data for conditioning graphs

When using the **Create Spotfire S+ Graph** wizard, in Step 2 you can specify an Excel worksheet and data range to use for conditioning the graph you are creating. A conditioned graph allows you to view your data in a series of panels, where each panel contains a subset of the original data. The subset in each panel is determined by the levels of the conditioning data range you select. You can skip conditioning by leaving the **Conditioning Range** field in this dialog blank.

When specifying a data range for conditioning, you may specify any valid data range in normal Excel range syntax. For example, say you specify the data range **A1:B6** from the **Sheet1** worksheet for the data to plot in a Spotfire S+ graph. You can also specify the data range **C1:C6** from **Sheet1** for the conditioning data. If a 2D line plot is created, the plot is conditioned on the data in **C1:C6**.

Handling errors during graph creation

If Spotfire S+ encounters problems during the creation of a graph in Excel, any error messages will appear in a modeless dialog box in Excel. If errors occur, it might mean that invalid data were specified for the plot created. It might also indicate another problem related to the range or data type of the data specified. The graph may not be created if errors occur.

USING SPOTFIRE S+ WITH SPSS

The SPSS add-in application works with SPSS to make it easy to create and modify Spotfire S+ graphs from within SPSS. This add-in includes the ability to create Spotfire S+ graphs from selected variables in the SPSS data editor, to modify the layout of a Spotfire S+ graph embedded in an SPSS output document, and to modify the properties of a plot in an embedded Spotfire S+ graph in SPSS. A helpful wizard guides you through the process of selecting variables, choosing a Spotfire S+ graph and plot type, and creating the graph in SPSS.

If you try to create a plot based on data that contains more than 100,000 rows using the SPSS add-in to Spotfire S+, you get an error. There is a limit of 100,000 rows using the SPSS add-in.

Installing the SPSS Add-In

During a **Typical** installation of Spotfire S+, Setup examines your system for the necessary version of SPSS (Version 8.0 or higher) and, if detected, automatically installs the SPSS add-in.

Note

To disable the automatic installation of the SPSS add-in during Setup, choose the **Custom** install option and clear **SPSS Add-in** from the list of components to install.

If you choose not to install the SPSS add-in during the installation of Spotfire S+, you can install it at any later time by running Setup, choosing the **Custom** install option, and selecting **SPSS Add-in** from the list of components to install.

Removing the SPSS Add-In

To remove the SPSS add-in, do the following:

1. Run Spotfire S+ Setup, choosing the **Modify** option.
2. Select **SPSS Add-in** from the list of components.

3. Follow the on-screen instructions.

Note

If you install the SPSS add-in during the installation of Spotfire S+ and later remove Spotfire S+, the SPSS add-in is removed automatically.

Using the SPSS Add-In

With the SPSS add-in installed, whenever you have the SPSS data editor open, a **Spotfire S+** menu and toolbar appear, as shown in Figure 10.12. The same menu and toolbar are also available whenever you have an output document open.

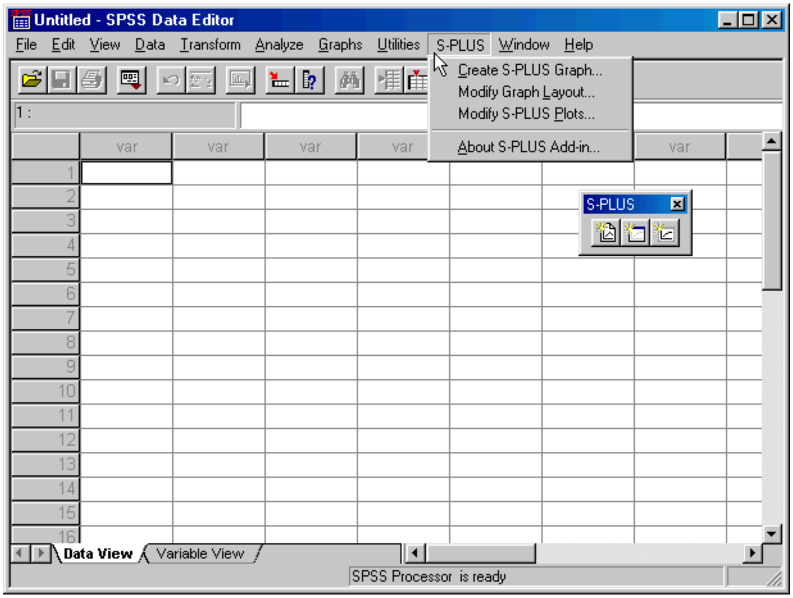


Figure 10.12: *The **Spotfire S+** menu and toolbar for the SPSS add-in.*

The menu and toolbar give you the following options:

- **Create Spotfire S+ Graph**
- **Modify Graph Layout**
- **Modify Spotfire S+ Plots**

Creating a graph

Spotfire S+ graphs created with the SPSS add-in are placed in an output document. You have the choice of creating a new output document or using an existing one.

To create a new Spotfire S+ graph with the currently selected variables in the data editor, do the following:

1. Select variables in the data editor you want to graph.
2. Click the **Create Graph** button on the **Spotfire S+** toolbar or choose **Spotfire S+ ▶ Create Graph** from the SPSS main menu.
3. Follow the instructions in the **Create Spotfire S+ Graph** wizard to create the graph.

Modifying a graph layout

To modify the layout properties of the currently selected Spotfire S+ graph, do the following:

1. Select a Spotfire S+ graph in your output document by clicking once on it. (If you double-click on a graph, you will activate it and start editing in place.)
2. Click the **Modify Graph Layout** button on the **Spotfire S+** toolbar or choose **Spotfire S+ ▶ Modify Graph Layout** from the SPSS main menu.
3. A Spotfire S+ **Graph Sheet** dialog opens in SPSS, allowing you to modify the layout properties of this graph.

Modifying a plot

To modify the properties of a plot in the currently selected Spotfire S+ graph, do the following:

1. Select a Spotfire S+ graph in your output document by clicking once on it.
2. Click the **Modify Plots** button on the **Spotfire S+** toolbar or choose **Spotfire S+ ▶ Modify Plots** from the SPSS main menu.

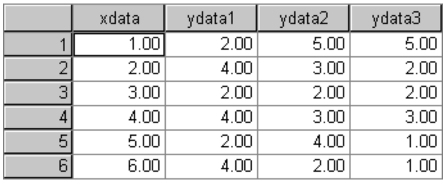
3. A dialog opens, showing you a list of the graph areas in this graph (you can have multiple graph areas in a graph, that is, one graph area might be 2D and another might be 3D in the same graph) and, for each graph area, a list showing all the plots in this graph area.
4. Select the graph area and the plot in this area that you want to edit and then click **Next**.
5. A Spotfire S+ plot properties dialog opens in SPSS, allowing you to modify the properties of this plot.

Selecting data for graphs

Before you can create a graph, you must first select some data in the data editor. You can select variables in the SPSS data editor by clicking on the column header where the variable name appears for each variable you want to include in the graph.

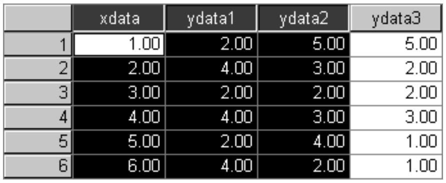
Spotfire S+ plots accept data in a variety of formats. Some plots require at least three columns of data, with the three columns being interpreted as *x*, *y*, and *z* data values. Other plots require at least four columns of data, with the four columns being interpreted as *x*, *y*, *z*, and *w* data values.

For example, consider the following variables in SPSS:



	xdata	ydata1	ydata2	ydata3
1	1.00	2.00	5.00	5.00
2	2.00	4.00	3.00	2.00
3	3.00	2.00	2.00	2.00
4	4.00	4.00	3.00	3.00
5	5.00	2.00	4.00	1.00
6	6.00	4.00	2.00	1.00

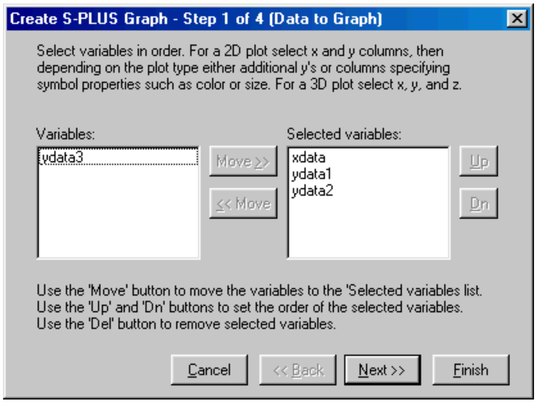
If you want to create two line plots in a graph, you can select the variables **xdata**, **ydata1**, and **ydata2**:



	xdata	ydata1	ydata2	ydata3
1	1.00	2.00	5.00	5.00
2	2.00	4.00	3.00	2.00
3	3.00	2.00	2.00	2.00
4	4.00	4.00	3.00	3.00
5	5.00	2.00	4.00	1.00
6	6.00	4.00	2.00	1.00

The **Create Spotfire S+ Graph** wizard treats the **xdata** variable in this selection as the *x* data and the **ydata1** and **ydata2** variables as the *y* data. In this case, two line plots are created, the first with *x* data as the **xdata** variable and *y* data as the **ydata1** variable and the second with *x* data as the **xdata** variable and *y* data as the **ydata2** variable.

Steps 1 and 2 of the **Create Spotfire S+ Graph** wizard allow you to add to, remove from, and reorder the list of selected variables used to create the Spotfire S+ graph.



Select variables in order. For a 2D plot select x and y columns, then depending on the plot type either additional y's or columns specifying symbol properties such as color or size. For a 3D plot select x, y, and z.

Variables:
ydata3

Selected variables:
xdata
ydata1
ydata2

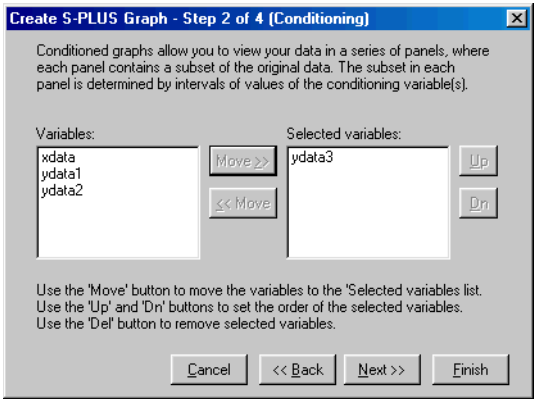
Use the 'Move' button to move the variables to the 'Selected variables list.
Use the 'Up' and 'Dn' buttons to set the order of the selected variables.
Use the 'Del' button to remove selected variables.

Figure 10.13: *The **Create Spotfire S+ Graph (Data to Graph)** dialog.*

The **Variables** list is a list of all available variables in the data editor. The **Selected variables** list is a list of variables from the available variables you have chosen to include in the Spotfire S+ graph. When a variable is selected in either list, you can use the **Move** buttons to move it between the lists. When a variable is selected in the **Selected variables** list, you can use the **Up** and **Dn** buttons to change the order of the variables. The order of the selected variables is important because the order determines how Spotfire S+ graphs the data. A similar dialog allows you to select variables for conditioning the graph you create.

Selecting data for conditioning graphs

When using the **Create Spotfire S+ Graph** wizard, in Step 2 you can specify variables to use for conditioning the graph you are creating.



Create S-PLUS Graph - Step 2 of 4 (Conditioning)

Conditioned graphs allow you to view your data in a series of panels, where each panel contains a subset of the original data. The subset in each panel is determined by intervals of values of the conditioning variable(s).

Variables:
xdata
ydata1
ydata2

Selected variables:
ydata3

Use the 'Move' button to move the variables to the 'Selected variables list.
Use the 'Up' and 'Dn' buttons to set the order of the selected variables.
Use the 'Del' button to remove selected variables.

Figure 10.14: *The **Create Spotfire S+ Graph (Conditioning)** dialog.*

A conditioned graph allows you to view your data in a series of panels, where each panel contains a subset of the original data. The subset in each panel is determined by the levels of the conditioning data range you select. You can skip conditioning by leaving the **Selected variables** list in this dialog empty.

Handling errors during graph creation

If Spotfire S+ encounters problems during the creation of a graph in SPSS, any error messages will appear in a modeless dialog box in SPSS. If errors occur, it might mean that invalid data were specified for the plot created. It might also indicate another problem related to the range or data type of the data specified. The graph may not be created if errors occur.

USING SPOTFIRE S+ WITH MATHSOFT MATHCAD

The Spotfire S+ component for Mathcad makes it easy to create and modify Spotfire S+ graphs from within the MathSoft Mathcad application. The component includes the ability to create Spotfire S+ graphs from selected Mathcad variables and to modify the layout or properties of a Spotfire S+ graph embedded in a Mathcad worksheet. The graph wizard guides you through the process of choosing a Spotfire S+ graph and plot type and creating the graph in Mathcad.

You can also use the S-PLUS script language to create and manipulate data within Spotfire S+ and return the information to Mathcad. The script wizard lets you enter S-PLUS language commands and specify the number of inputs to be passed from Mathcad and the number of outputs to be returned to Mathcad.

Installing the Spotfire S+ Component for Mathcad

During a **Typical** installation of Spotfire S+, Setup examines your system for the necessary version of Mathcad (Version 8.02 or higher) and, if detected, automatically installs the Spotfire S+ component for Mathcad.

Note

If you have an earlier version of Mathcad, Setup warns you that Mathcad 8.02 is required and tells you that it cannot install the Spotfire S+ Mathcad component.

Using the Spotfire S+ Component for Mathcad

With the Spotfire S+ component for Mathcad installed, you can use it from any Mathcad worksheet by choosing **Insert ► Component** from the Mathcad main menu. The **Component Wizard** appears as shown in Figure 10.15.

The **Component Wizard** gives you two options:

- Create a Spotfire S+ graph
- Create and run an S-PLUS language script

Often, you will want to use both options in a single worksheet. You might first use a script to create or modify some data in Spotfire S+ and then graph the data. Your Mathcad worksheet can display both the data and the graph and an explanation of what you are hoping to accomplish.

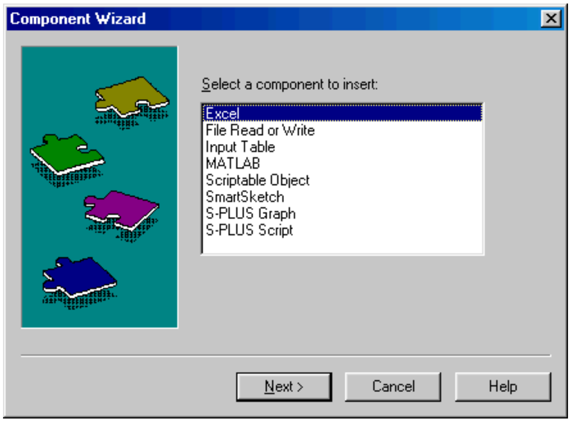
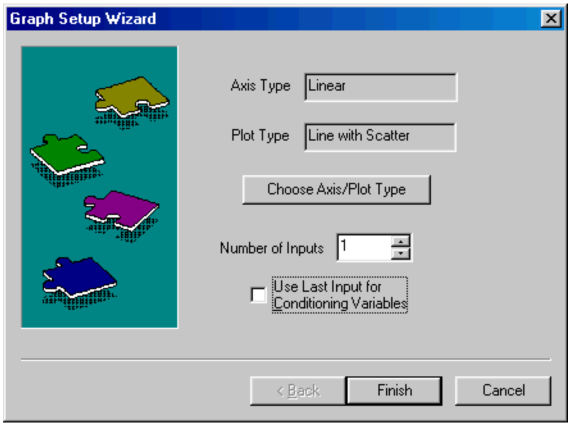


Figure 10.15: *The* ***Component Wizard***.

Creating a graph

To create a graph with the Spotfire S+ component for Mathcad, do the following:

1. Click in a blank space in your Mathcad worksheet. A red crosshair indicates the insertion point.
2. From the Mathcad main menu, choose **Insert ▶ Component** to open the **Component Wizard** dialog.
3. Select **Spotfire S+ Graph** and then click **Next** to start the **Graph Setup Wizard**, as shown in Figure 10.16.


Axis Type: Linear

Plot Type: Line with Scatter

Number of Inputs: 1

□ Use Last Input for Conditioning Variables

Figure 10.16: *The* ***Graph Setup Wizard***.

4. The default plot type is a linear line-with-scatter plot, which takes one input. This plots a single column vector against a set of indices. If you want the default plot type, click **Finish**. If you want to change the plot type, click the **Choose Axis/Plot Type** button to open the **Choose Graph and Plot Type** dialog, as shown in Figure 10.17.

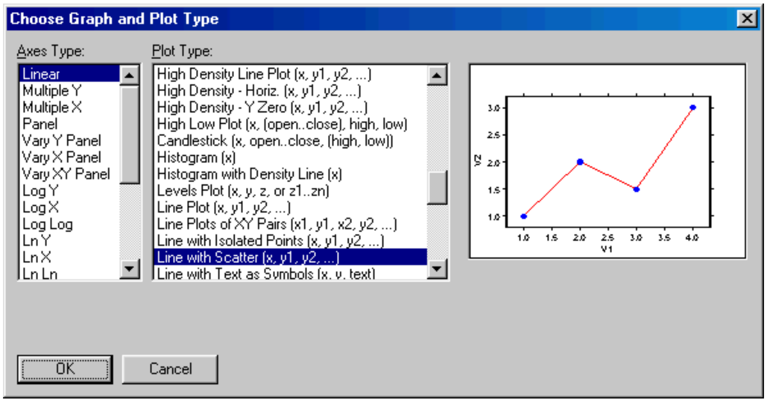

Choose Graph and Plot Type
Axes Type:
Linear
Multiple Y
Multiple X
Panel
Vary Y Panel
Vary X Panel
Vary XY Panel
Log Y
Log X
Log Log
Ln Y
Ln X
Ln Ln
Plot Type:
High Density Line Plot (x, y1, y2, ...)
High Density - Horiz. (x, y1, y2, ...)
High Density - Y Zero (x, y1, y2, ...)
High Low Plot (x, (open..close), high, low)
Candlestick (x, open..close, (high, low))
Histogram (x)
Histogram with Density Line (x)
Levels Plot (x, y, z, or z1..zn)
Line Plot (x, y1, y2, ...)
Line Plots of XY Pairs (x1, y1, x2, y2, ...)
Line with Isolated Points (x, y1, y2, ...)
Line with Scatter (x, y1, y2, ...)
Line with Text as Symbols (x, y, text)
3.0
2.5
2.0
1.5
1.0
y2
1.0
1.5
2.0
2.5
3.0
3.5
4.0
y1
OK
Cancel

Figure 10.17: *The **Choose Graph and Plot Type** dialog.*

5. Select an axis type from the **Axes Type** list and a plot type from the **Plot Type** list and then click **OK**.

Note

The argument list after each plot type specifies how the data must be input for a particular type. Many plot types accept a variable number of inputs. For example, **Line Plot (x, y1, y2, ...)** takes a variable number of inputs, where the first is interpreted as the *x* value and the rest as *y* values.

6. In the **Number of Inputs** field in the **Graph Setup Wizard**, specify the required number of inputs for your plot type.

7. To create a Trellis plot, select the **Use Last Input for Conditioning Variables** check box. The last input may contain multiple columns, all of which are used as conditioning variables.

8. Click **Finish** to insert the component. An empty rectangle appears in your Mathcad worksheet, with one or more placeholders for your specified inputs.

9. Specify appropriate inputs, and the plot appears.

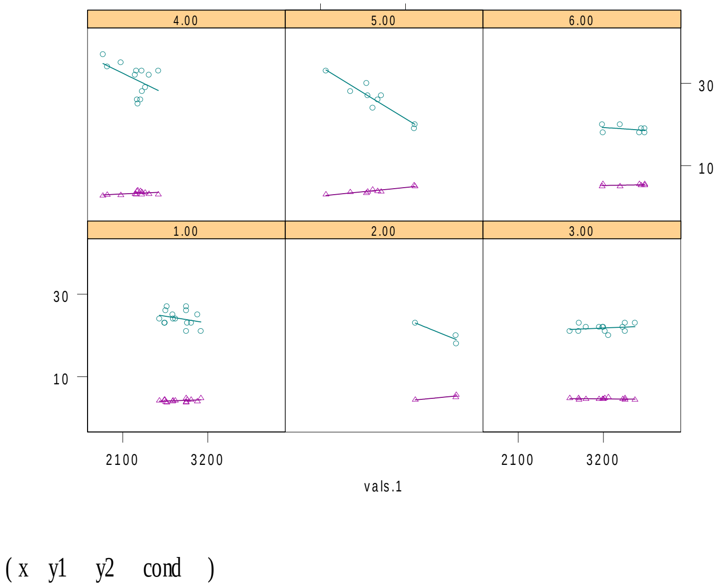
As an example, suppose you want to create two linear fit scatter plots with a single conditioning variable.

1. Define data points for variables `x`, `y1`, `y2`, and `cond` in your Mathcad worksheet.
2. Insert a Spotfire S+ graph component.
3. From the **Graph Setup Wizard**, click the **Choose Axis/Plot Type** button.
4. In the **Choose Graph and Plot Type** dialog, select **Linear** in the **Axes Type** list and **Fit-Linear Least Squares** as the **Plot Type**. Click **OK**.
5. In the **Graph Setup Wizard**, type **4** in the **Number of Inputs** field and select the **Use Last Input for Conditioning Variables** check box. Click **OK**.
6. Click in the input variable placeholders and enter your variable names (`x`, `y1`, `y2`, and `cond`). Click out of the component to activate the plot.
7. Format the plot as you like by double-clicking in the graph area of the component, bringing up the **Spotfire S+** toolbars.

Figure 10.18 shows such a graph. In this example, we used the `fuel.frame` sample data set where `x` is the `Weight` variable, `y1` is `Mileage`, `y2` is `Fuel`, and `cond` are the *codes* of the factor variable `Type`. The value 1 corresponds to the `Compact` type, 2 to `Large`, 3 to `Medium`, 4 to `Small`, 5 to `Sporty`, and 6 to `Van`.

Note

If you change the number of inputs to a graph component, your existing plot will be deleted and a new plot will be created but all your other settings will be saved. If you change the graph type, however, everything will be deleted before a graph of the requested type is created; that is, all your other modifications will be lost.



(x y1 y2 cond)

Figure 10.18: *A Trellis graph in a Mathcad worksheet.*

Creating an S-PLUS script

To create a Spotfire S+ language script in Mathcad, do the following:

1. Click in a blank space in your Mathcad worksheet. A red crosshair indicates the insertion point.
2. From the Mathcad main menu, choose **Insert ▶ Component** to open the **Component Wizard** dialog.
3. Select **Spotfire S+ Script** and then click **Next** to start the **Spotfire S+ Script Setup Wizard**, as shown in Figure 10.19.

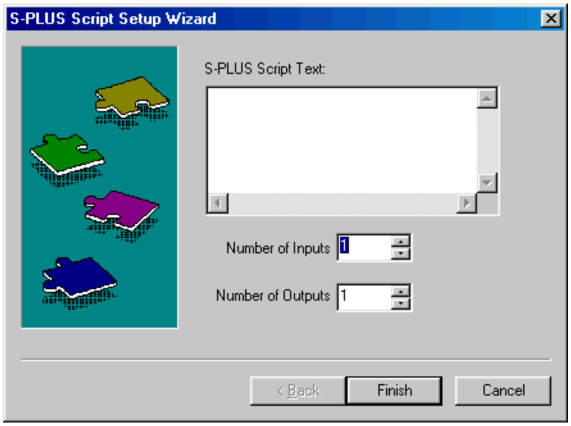


Figure 10.19: *The **Spotfire S+ Script Setup Wizard**.*

4. Type S-PLUS language commands in the **S-PLUS Script Text** field. For example, you might enter the following series of commands:

```
lmobj <- lm(Mileage ~ Weight, data = fuel.frame)
out0 <- lmobj$fitted
out1 <- lmobj$resid
```

Note

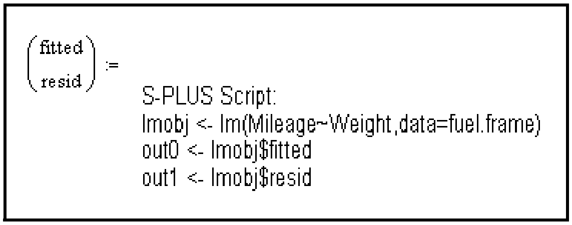
By default, component output variables have the names `out0`, `out1`, etc. To change the default output variable names, see Modifying a component on page 515.

5. In the **Number of Inputs** field, specify the number of values to be passed to Spotfire S+ from Mathcad. (For the example script shown in Step 4, the number of inputs is 0.)

6. In the **Number of Outputs** field, specify the number of values to be passed from Spotfire S+ to Mathcad. (For the example script shown in Step 4, the number of outputs is 2.)

7. Click **Finish** to insert the component. The placeholders for input appear at the bottom of the component, and the placeholders for output appear at the top left.

8. Enter Mathcad variable names for the inputs and/or outputs (if any). In our example, you might use `fitted` and `resid` as the output variable names. The script component appears in your worksheet as shown below:



$\begin{pmatrix} \text{fitted} \\ \text{resid} \end{pmatrix} :=$

```
S-PLUS Script:
lmobj <- lm(Mileage~Weight,data=fuel.frame)
out0 <- lmobj$fitted
out1 <- lmobj$resid
```

9. When the input and output variables have been specified, these variables are available for use in Mathcad.

Click out of the component and type or use the variables you have defined. For example, type `fitted=` to see the results of running the S-PLUS script.

Modifying a component

You can modify any Spotfire S+ component by right-clicking on the component in the Mathcad worksheet and choosing **Properties** from the shortcut menu. For the script component, right-click on the script text and then choose **Properties**. Clicking outside the script text pops up a different shortcut menu. A properties dialog appears, showing all the options of the original script or graph wizard, plus, for script components, the option to change the input and output variable names. By default, these names are `in0`, `in1`, `in2`, `in3`, and `out0`, `out1`, `out2`, `out3`. Modifying the input and output names is useful if you have an existing Spotfire S+ script that uses meaningful variable names and you don’t want to edit the script before including it as a component.

USING SPOTFIRE S+ WITH MICROSOFT POWERPOINT

If you have Microsoft PowerPoint 7.0 or higher installed on your computer, you can automatically create a PowerPoint presentation using your Spotfire S+ **Graph Sheets**.

Installing the PowerPoint Presentation Wizard

During a **Typical** installation of Spotfire S+, Setup examines your system for the necessary version of PowerPoint and, if detected, automatically installs the PowerPoint Presentation Wizard.

Note

To disable the automatic installation of the PowerPoint Presentation Wizard during Setup, choose the **Custom** install option and clear **PowerPoint Presentation Wizard** from the list of components to install.

Note

The menu options and user interface you see in Microsoft Powerpoint will be determined by the version of that application you are running.

If you choose not to install the PowerPoint Presentation Wizard during the installation of Spotfire S+, you can install it at any later time by running Setup, choosing the **Custom** install option, and selecting **PowerPoint Presentation Wizard** from the list of components to install.

Removing the PowerPoint Presentation Wizard

To remove the PowerPoint Presentation Wizard, do the following:

1. Run Spotfire S+ Setup, choosing the **Modify** option.
2. Select **PowerPoint Presentation Wizard** from the list of components.

3. Follow the on-screen instructions.

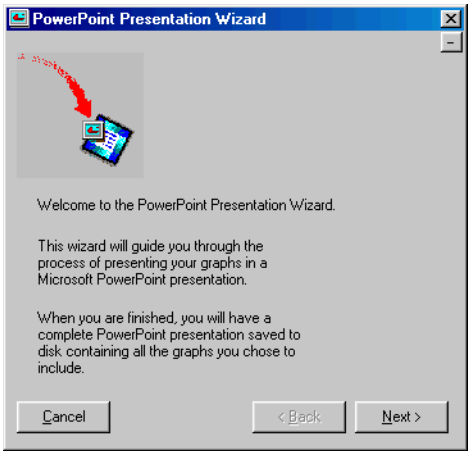
Note

If you install the PowerPoint Presentation Wizard during the installation of Spotfire S+ and later remove Spotfire S+, the PowerPoint Presentation Wizard is removed automatically.

Creating a PowerPoint Presentation

To create a PowerPoint presentation using your Spotfire S+ **Graph Sheets**, do the following:

1. Click the **PowerPoint Presentation** button on the **Standard** toolbar or select **Create PowerPoint Presentation** from the **File** menu.
2. The **Welcome** screen of the **PowerPoint Presentation Wizard** is displayed.


PowerPoint Presentation Wizard

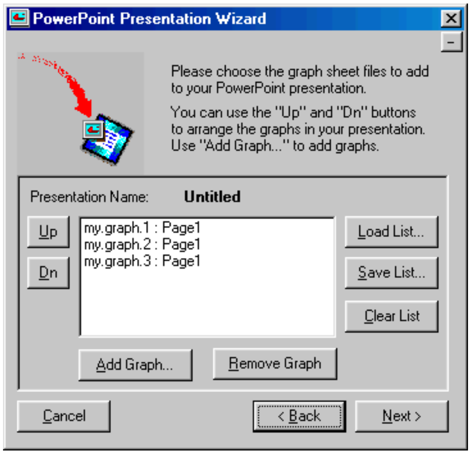
Welcome to the PowerPoint Presentation Wizard.

This wizard will guide you through the process of presenting your graphs in a Microsoft PowerPoint presentation.

When you are finished, you will have a complete PowerPoint presentation saved to disk containing all the graphs you chose to include.

Figure 10.20: *The* ***PowerPoint Presentation Wizard****.*

3. Click **Next**.



PowerPoint Presentation Wizard

Please choose the graph sheet files to add to your PowerPoint presentation.

You can use the "Up" and "Dn" buttons to arrange the graphs in your presentation. Use "Add Graph..." to add graphs.

Presentation Name: **Untitled**

my.graph.1 : Page1
my.graph.2 : Page1
my.graph.3 : Page1

Figure 10.21: *Selecting your* ***Graph Sheets***.

4. As shown in Figure 10.21, the first page of the wizard gives you several options. By default, the **Graph Sheets** currently open in your session are selected for the presentation. However, you can change the selections by doing any of the following:

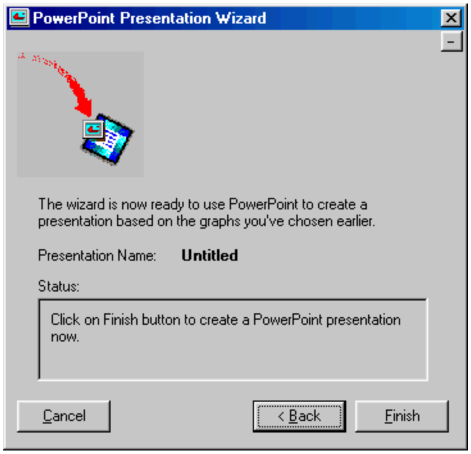
   - Click the **Add Graph** button and navigate to a saved **Graph Sheet** to add it to the presentation.
   - Select a **Graph Sheet** in the window and click the **Remove Graph** button to delete it from the presentation.
   - Click the **Load List** button to load a previously saved presentation list.
   - Click the **Save List** button to save the current presentation list.
   - Click the **Clear List** button to reset the contents of the presentation list.

To rearrange the order of your **Graph Sheets**, use the **Up** and **Dn** buttons.

Note

If any of your **Graph Sheets** contain multiple pages, you can select any or all of the pages for inclusion in your PowerPoint presentation.

5. Click **Next**.



The wizard is now ready to use PowerPoint to create a presentation based on the graphs you've chosen earlier.

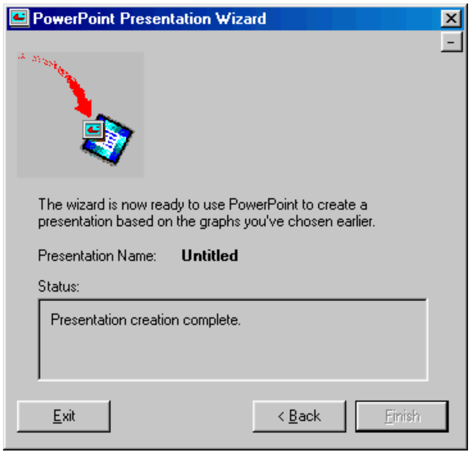
Presentation Name: **Untitled**

Status:

Click on Finish button to create a PowerPoint presentation now.

Figure 10.22: *Preparing to create the presentation.*

6. Click **Finish**.



The wizard is now ready to use PowerPoint to create a presentation based on the graphs you've chosen earlier.

Presentation Name: **Untitled**

Status:

Presentation creation complete.

Figure 10.23: *Completing the presentation.*

PowerPoint starts and the graphs you chose are inserted as slides, in the order you specified, in a new PowerPoint presentation. As the graphs are inserted, status information appears in a box in the wizard.

7. When the presentation is complete, click **Exit**.

If you saved your presentation list in the wizard, PowerPoint will automatically save the new presentation using the same name. If you did not save your presentation list in the wizard and the **Presentation Name** is **Untitled**, you will need to explicitly save it in PowerPoint.

CUSTOMIZING YOUR SPOTFIRE S+ SESSION 11

INTRODUCTION

Spotfire S+ gives you many options for customizing your working environment. In this chapter, we show you how to set your general session preferences, as well as how to do the following:

- Define your own defaults for S-PLUS objects.
- Choose the font to be used in the **Commands** window.
- Specify undo and history log preferences.
- Control text output display.
- Change the background color of the **Object Explorer** and other windows.
- Completely customize your graphs through various options, styles, and color schemes.
- Have Spotfire S+ automatically set certain options or perform certain tasks each time you start or end a session.

You can even tailor the Spotfire S+ interface itself by using customizable menus and toolbars. For more information on menus and toolbars, see Chapter 8, Extending the User Interface, in the *Application Developer's Guide.*

CHANGING DEFAULTS AND SETTINGS

Object Defaults

In Spotfire S+ you can define your own default for any type of object, including symbols, plots, titles, **Graph Sheets**, and data objects. To do so:

1. Select an object of the type for which you want to define the default.
2. Modify the object's properties to match the exact specifications you want to save as the default for that type of object.
3. Save your changes (for example, by clicking **OK** in a dialog).
4. Select the object, if it is not already selected.
5. Do one of the following:
   - From the main menu, choose **Options ► Save [Object] as Default**.
   - Right-click the object and select **Save [Object] as default** from the shortcut menu.

The actual name of the selected object replaces the word **[Object]** in the menu option. For example, if you select the *x*-axis title on a graph and change the font, the menu option reads **Save X Axis Title as Default**. When more than one object is selected, the menu option reads **Save Selected Objects as Default**.

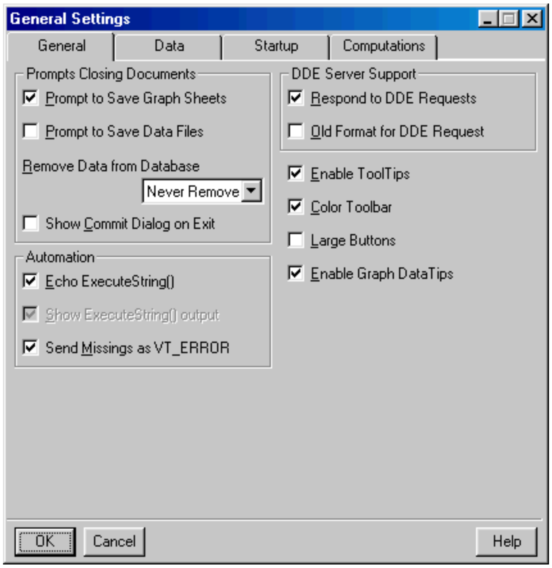
The properties of the selected object are now saved as the default values. The next time you create an object of this type, it will use these new defaults.

General Settings

To specify general session settings, choose **Options** ▶ **General Settings** from the main menu. The **General Settings** dialog consists of four tabbed pages of options, discussed below.

General

The **General** page of the **General Settings** dialog is shown in Figure 11.1.



Prompts Closing Documents

☑ Prompt to Save Graph Sheets

□ Prompt to Save Data Files

Remove Data from Database: Never Remove

□ Show Commit Dialog on Exit

Automation

☑ Echo ExecuteString()

☑ Show ExecuteString() output

☑ Send Missings as VT_ERROR

DDE Server Support

☑ Respond to DDE Requests

□ Old Format for DDE Request

☑ Enable ToolTips

☑ Color Toolbar

□ Large Buttons

☑ Enable Graph DataTips

Figure 11.1: *The **General** page of the **General Settings** dialog.*

Prompts Closing Documents group

Prompt to Save Graph Sheets When selected, Spotfire S+ issues a dialog prompt whenever you close a **Graph Sheet** window displaying a new or modified **Graph Sheet**.

> **Note**
>
> **Graph Sheets**, like scripts and reports, are transient *document objects* that exist only in your current session. The prompt dialog is a handy reminder that in order to permanently store a **Graph Sheet**, you must save it to an external (**.sgr**) file. Note that if you clear this check box, you can still save your **Graph Sheets** by choosing **File** ▶ **Save** from the main menu before closing the **Graph Sheet** window.

Prompt to Save Data Files When selected, Spotfire S+ issues a dialog prompt whenever you close a **Data** window displaying a new or modified data set.

Note

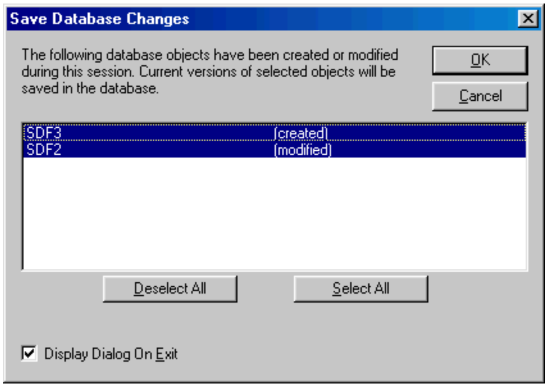
Unlike **Graph Sheets**, data sets are automatically and permanently stored in a special internal database called the *working data*. Letting Spotfire S+ store your data for you is the easiest way to manage your data. However, if you prefer, you can save your data sets as external (**.sdd**) files; the prompt dialog simply reminds you to do so. Note that if you clear this check box, you can still save your data sets as files by choosing **File ▶ Save** from the main menu before closing the **Data** window.

Remove Data from Database Select an option to control how Spotfire S+ handles the data objects in your working data that you have created or modified during the current session when you end the session.

Note

The default for this field is **Never Remove Data**. However, if you elect to store your data sets in external files, you should probably select **Always Remove Data** to prevent conflicts with database objects when you open these external files.

Show Commit Dialog on Exit When selected, Spotfire S+ displays the **Save Database Changes** dialog, as shown in Figure 11.2, when you exit Spotfire S+.



Save Database Changes

The following database objects have been created or modified during this session. Current versions of selected objects will be saved in the database.

SDF3 (created)
SDF2 (modified)

☑ Display Dialog On Exit

Figure 11.2: *The* ***Save Database Changes*** *dialog.*

The **Save Database Changes** dialog gives you an opportunity to save or discard any new or changed data objects before closing the program. Note that you can also turn off this feature by clearing the **Display Dialog On Exit** check box at the bottom of the dialog.

Hint

To display this dialog at any time, click the **Restore Data Objects** button on the **Standard** toolbar.

Automation group

Echo ExecuteString() When selected, command strings executed with the automation method `ExecuteStrings()` are displayed on the command line in the **Commands** window, if open. Selecting this option automatically enables the **Show ExecuteString() output** option.

Show ExecuteString() output When selected, output from the result of executing the string passed to `ExecuteString()` is displayed in the output window specified in **Text Output Routing** (see page 537).

Send Missings as VT_ERROR When selected, automation client support sends missing values in data objects as variant type VT_ERROR. This option is selected by default and is important because programs such as Visual Basic interpret missing values as error values.

DDE Server Support group

Respond to DDE Requests When selected, Spotfire S+ responds to Dynamic Data Exchange queries. For more information, see Chapter 7, Calling Spotfire S+ Using DDE, in the *Application Developer's Guide.*

Old Format for DDE Request When selected, Spotfire S+ uses the text formatting style from earlier versions of Spotfire S+ when responding to Dynamic Data Exchange queries.

Other

Enable ToolTips When selected, button labels appear in small pop-up windows when you hover the mouse over toolbar and palette buttons.

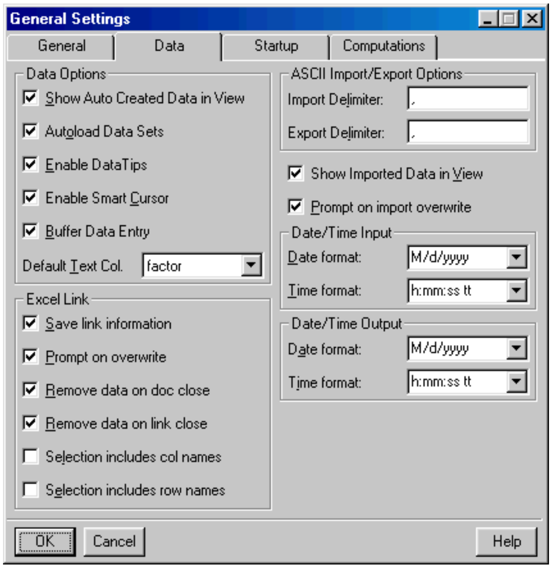
Color Toolbar When selected, toolbars are displayed in color. Otherwise, they appear in black and white.

Large Buttons When selected, large toolbar buttons are displayed. By default, Spotfire S+ displays small toolbar buttons.

Enable Graph DataTips When selected, data information appears in small pop-up windows when you hover the mouse over data points on a **Graph Sheet**.

Data

The **Data** page of the **General Settings** dialog is shown in Figure 11.3.



General Settings

General | Data | Startup | Computations

Data Options
- ☑ Show Auto Created Data in View
- ☑ Autoload Data Sets
- ☑ Enable DataTips
- ☑ Enable Smart Cursor
- ☑ Buffer Data Entry
- Default Text Col. factor

Excel Link
- ☑ Save link information
- ☑ Prompt on overwrite
- ☑ Remove data on doc close
- ☑ Remove data on link close
- □ Selection includes col names
- □ Selection includes row names

ASCII Import/Export Options
- Import Delimiter: ,
- Export Delimiter: ,

☑ Show Imported Data in View

☑ Prompt on import overwrite

Date/Time Input
- Date format: M/d/yyyy
- Time format: h:mm:ss tt

Date/Time Output
- Date format: M/d/yyyy
- Time format: h:mm:ss tt

Figure 11.3: *The **Data** page of the **General Settings** dialog.*

Data Options group

Show Auto Created Data in View When selected, a new **Data** window automatically opens to display a data object created through one of the **Data** or **Statistics** dialogs. When this option is turned off, the data object appears in the **Object Explorer**.

Autoload Data Sets When a **Graph Sheet** is created, Spotfire S+ automatically loads the corresponding data into a **Data** window when this option is selected.

Enable DataTips When selected, column descriptions (if any) appear in small pop-up windows when you hover the mouse over column names in a **Data** window.

Enable Smart Cursor When selected, the cursor always moves in the direction of the last movement when the ENTER key is pressed while entering data in cells.

Buffer Data Entry When selected, a special buffer is used to speed up data editing. It is recommended that you leave this option selected.

Default Text Col. By default, Spotfire S+ creates a factor type column when you type character data into an empty column in a **Data** window. To create a character type column by default, select **character** in this field.

Ragged data.frame By default, Spotfire S+ expects all columns in a data set to be of equal length and will pad shorter columns with `NA`s to even out the columns. To prevent this behavior, select this option.

Excel Link group

Save link information When this option is selected, link information is stored in the source object. If the source is an Excel document, link information is written as a comment in the upper left cell of the data range. If the source is an S-PLUS data frame, link information is stored as an attribute of the data frame.

Prompt on overwrite When selected, Spotfire S+ issues a prompt when overwriting data in either an Excel document or an S-PLUS data frame, whichever is the target for the particular link.

Remove data on doc close When selected, linked data are removed when the current document is closed.

Remove data on link close When selected, linked data are removed when the current link is closed.

Selection includes col names When selected, Spotfire S+ automatically interprets the first row in the selected data range as the column names row.

Selection includes row names When selected, Spotfire S+ automatically interprets the first column in the selected data range as the row names column.

ASCII Import/Export Options group

Import Delimiter Specify a delimiter for importing ASCII text. The default delimiter is a comma.

Export Delimiter Specify a delimiter for exporting to ASCII text. The default delimiter is a comma.

Other

Show Imported Data in View When selected, Spotfire S+ automatically opens a **Data** window to display imported data.

Prompt on import overwrite When selected, Spotfire S+ prompts you for overwrite confirmation when you are attempting to import a data file that is named the same as a data set already stored in the database.

Date/Time Input group

Date format Select the format you prefer to use when creating and displaying date data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

Time format Select the format you prefer to use when creating and displaying time data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

Note

The selections you make in the **Date format** and **Time format** fields persist only for the current session. To preserve your settings from session to session, clear the **Use Regional Options for input** check box in the **Date/Time Formats** group on the **Startup** page of the dialog.

Date/Time Output group

Date format Select the format you prefer to use when outputting date data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

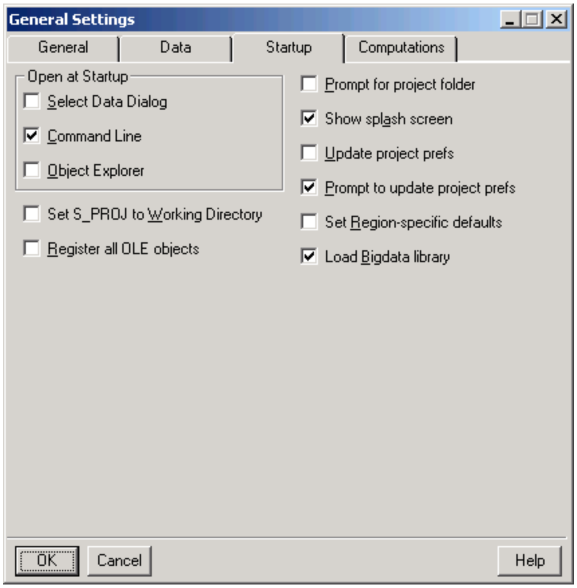
Time format Select the format you prefer to use when outputting time data. The available choices mirror those in your Windows Regional Options; the default value for this field is the current Windows default.

Note

The selections you make in the **Date format** and **Time format** fields persist only for the current session. To preserve your settings from session to session, clear the **Use Regional Options for output** check box in the **Date/Time Formats** group on the **Startup** page of the dialog.

Startup

The **Startup** page of the **General Settings** dialog is shown in Figure 11.4.



Open at Startup
- ☐ Select Data Dialog
- ☑ Command Line
- ☐ Object Explorer

- ☐ Set S_PROJ to Working Directory
- ☐ Register all OLE objects
- ☐ Prompt for project folder
- ☑ Show splash screen
- ☐ Update project prefs
- ☑ Prompt to update project prefs
- ☐ Set Region-specific defaults
- ☑ Load Bigdata library

Figure 11.4: *The **Startup** page of the **General Settings** dialog.*

Open at Startup group

Choose whether to have Spotfire S+ automatically open at startup the **Select Data** dialog, the **Commands** window, and/or the default **Object Explorer**.

Other

Set S_PROJ to Working Directory This option works in conjunction with the **Shortcut** page of the **Spotfire S+ Properties** dialog to determine the location of the project folder. (To open the **Shortcut** page, right-click the Spotfire S+ startup icon on the desktop, select **Properties**, and click the **Shortcut** tab.)

Note

By default, this option is not selected and the **Start in** field on the **Shortcut** page is ignored. The project folder is then determined by one of the following:

- The default behavior
- The value of S_PROJ in the **Target** field of the **Shortcut** page
- The value of S_DATA in the **Target** field of the **Shortcut** page

If **Set S_PROJ to Working Directory** is selected, the project folder is determined by the contents of the **Start in** field on the **Shortcut** page.

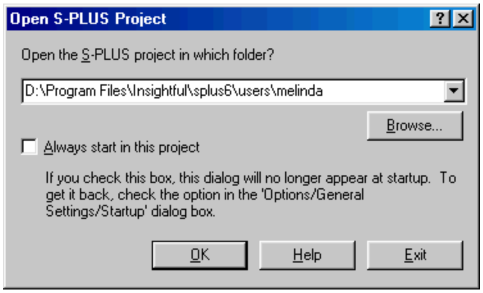
To avoid confusion, it is recommended that you do not mix methods; that is, do *one* of the following:

- Do not select this option and use S_PROJ or S_DATA in the **Target** field to specify the location of the project and/or data folder.
- Select this option and use only the **Start in** field to specify the location of the project folder, without specifying S_PROJ or S_DATA in the **Target** field.

Register all OLE objects When selected, all the objects you have linked or embeded (OLE objects) are registered.

Prompt for project folder When selected, the dialog shown in Figure 11.5 opens each time you start Spotfire S+, allowing you to specify the project folder you want to use for the session. To turn off this feature and use the default project folder each time you start Spotfire S+, clear this check box or select the **Always start in this project** check box in the dialog.

Load Bigdata library When selected, the bigdata library loads on startup. If you work with a large data set, and you do not select this option, you could see unexpected results when you try to perform actions. If your projects typically include large data sets, then select this option to always load the bigdata library when you start.



Open the S-PLUS project in which folder?

D:\Program Files\Insightful\splus6\users\melinda

□ Always start in this project

If you check this box, this dialog will no longer appear at startup. To get it back, check the option in the 'Options/General Settings/Startup' dialog box.

Figure 11.5: *The* ***Open Spotfire S+ Project*** *dialog.*

Show splash screen When selected, the Spotfire S+ splash screen appears when you start Spotfire S+. To turn off this feature, clear this check box.

Update project prefs This check box controls whether your project's **.Prefs** folder will be updated at startup to the latest version of preferences installed in the **\MasterPrefs** folder of your Spotfire S+ program folder. When selected, a dialog prompts you if your **.Prefs** folder needs to be updated. If you elect to update your files, a backup folder is created and the original files are copied there before updating.

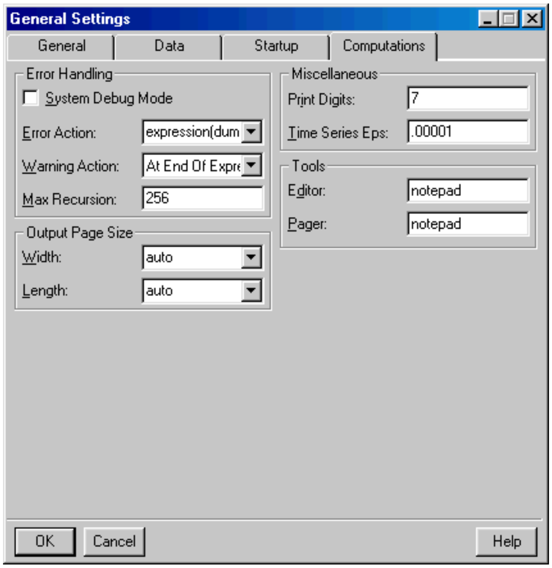
Date/Time Formats group

Use Regional Options for input When selected, date/time formats used when inputting data are reset to the current selections in your Windows Regional Options. Clear this check box to preserve from session to session the selections you make in the **Date/Time Input** group on the **Data** page of the dialog.

Use Regional Options for output When selected, date/time formats used when outputting data are reset to the current selections in your Windows Regional Options. Clear this check box to preserve from session to session the selections you make in the **Date/Time Output** group on the **Data** page of the dialog.

Computations

The **Computations** page of the **General Settings** dialog is shown in Figure 11.6.



Error Handling

□ System Debug Mode

Error Action: expression(dum

Warning Action: At End Of Expre

Max Recursion: 256

Output Page Size

Width: auto

Length: auto

Miscellaneous

Print Digits: 7

Time Series Eps: .00001

Tools

Editor: notepad

Pager: notepad

Figure 11.6: *The **Computations** page of the **General Settings** dialog.*

Error Handling group

System Debug Mode When you select **System Debug Mode**, Spotfire S+ performs various internal checks during evaluation. This option gives you more information about warning messages and reloading and may help in tracking down mysterious bugs, such as when Spotfire S+ terminates abnormally. Note that evaluation is substantially slower with this option turned on, and at times it may introduce strange behavior.

Error Action Select the function (with no arguments) to be called when an error or interrupt occurs. Spotfire S+ provides `dump.calls` and `dump.frames` to dump the outstanding function calls or the entire associated frames. (For details on these functions, consult the online help.) Setting the function to `NULL` eliminates all error actions.

Warning Action Select the level of warnings that you would like reported.

Max Recursion Specify the maximum depth to which expressions can be nested. This option exists primarily to catch runaway recursive calls of a function to itself, directly or indirectly.

Output Page Size group

Values for these two settings apply to all output windows and persist between Spotfire S+ sessions for the current project. By default, **Width** and **Length** are automatically set to the dimensions of the current output window (which includes **Script** and **Report** windows as well as the **Commands** window), but you can override this default behavior by entering your own values in these fields.

Miscellaneous group

Print Digits Specify the number of significant digits to use in print (and, therefore, in automatic printing). Setting this value to 17 gives the full length of double precision numbers.

Time Series Eps Specify the time series comparison tolerance. This small number is used throughout the time series functions for comparison of their frequencies. Frequencies are considered equal if they differ in absolute value by less than the number specified here.

Tools group

Editor Specify the default text editor command to be used by the `edit` function. Whatever editor you choose is invoked in the style of Notepad, that is, by a command of the form `Notepad` *`filename`*, followed by the reading of editing commands. Do not supply editors that expect a different invocation or a different form of user interaction.

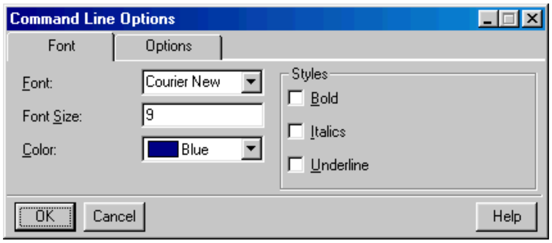
Pager Specify the default pager program to be used by the `help` and `page` functions. Whatever pager you choose is invoked as `pager` *`filename`* and should read from *`filename`*.

Command Line

To specify command line options, choose **Options ▶ Command Line** from the main menu. The **Command Line Options** dialog consists of two tabbed pages of options, discussed below.

Font

The **Font** page of the **Command Line Options** dialog is shown in Figure 11.7.



Command Line Options

Font: Courier New

Font Size: 9

Color: Blue

Styles

□ Bold

□ Italics

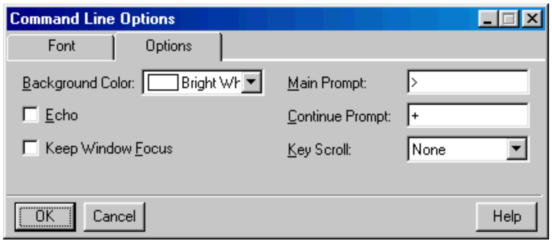
□ Underline

Figure 11.7: *The **Font** page of the **Command Line Options** dialog.*

Use the options on this page to specify the font, font size, color, and styles to be used in the **Commands** window. To ensure proper alignment of output, a fixed-width font, such as Letter Gothic or Courier, is recommended.

Options

The **Options** page of the **Command Line Options** dialog is shown in Figure 11.8.



Command Line Options

Background Color: Bright Wh

□ Echo

□ Keep Window Focus

Main Prompt: >

Continue Prompt: +

Key Scroll: None

Figure 11.8: *The **Options** page of the **Command Line Options** dialog.*

Background Color Select a background color to be used in the **Commands** window.

Echo When selected, each complete expression is echoed before it is evaluated.

Keep Window Focus When selected, the **Commands** window remains in focus when commands are executed.

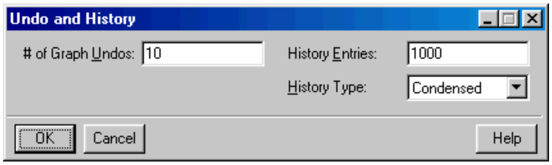
Main Prompt Specify the string to be used to prompt for an expression. The default is >.

Continue Prompt Specify the string to be used to prompt for the continuation of an expression. The default is +.

Key Scroll Select a method for scrolling through the **Commands** window.

Undo and History

To specify undo and history options, choose **Options ▶ Undo & History** from the main menu. The **Undo and History** dialog is shown in Figure 11.9.



Undo and History

# of Graph Undos: 10

History Entries: 1000

History Type: Condensed

Figure 11.9: *The **Undo and History** dialog.*

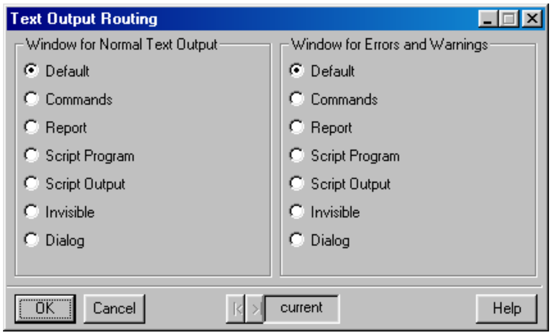
# of Graph Undos Specify the maximum number of undos to be saved in the undo queue for graph objects. The higher the number of undos, the more memory is used.

History Entries Specify the maximum number of entries to be saved in the history log. The higher the number of entries, the more memory is used.

History Type Select **Condensed** for a brief history or **Full** for a more detailed history.

Text Output Routing

To specify text output settings, choose **Options ▶ Text Output Routing** from the main menu. The **Text Output Routing** dialog is shown in Figure 11.10.


Text Output Routing

Window for Normal Text Output
- ● Default
- ○ Commands
- ○ Report
- ○ Script Program
- ○ Script Output
- ○ Invisible
- ○ Dialog

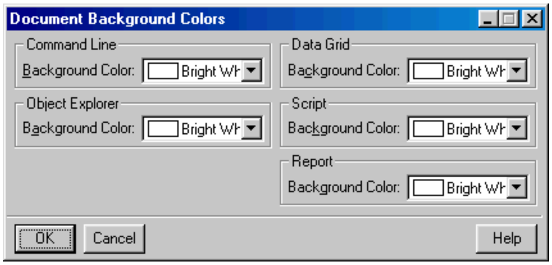
Window for Errors and Warnings
- ● Default
- ○ Commands
- ○ Report
- ○ Script Program
- ○ Script Output
- ○ Invisible
- ○ Dialog

Figure 11.10: *The **Text Output Routing** dialog.*

Use the options on this page to specify your output window preferences for normal text and for errors and warnings.

Document Background Colors

To specify document background colors, choose **Options ▶ Document Background Colors** from the main menu. The **Document Background Colors** dialog is shown in Figure 11.11.


Document Background Colors

Command Line
Background Color: Bright Wh

Data Grid
Background Color: Bright Wh

Object Explorer
Background Color: Bright Wh

Script
Background Color: Bright Wh

Report
Background Color: Bright Wh

Figure 11.11: *The **Document Background Colors** dialog.*

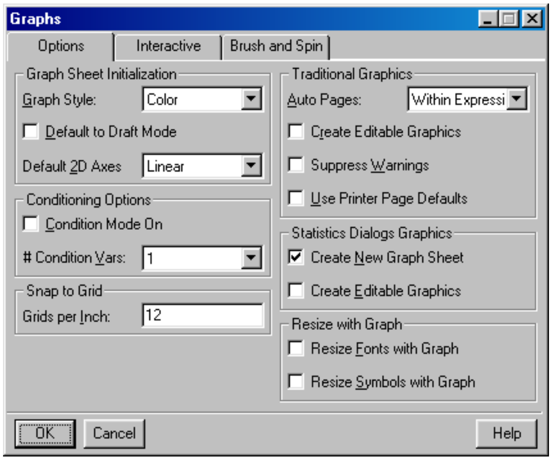
Make selections on this page to specify your background color preferences for the **Commands**, **Object Explorer**, **Data**, **Script**, and **Report** windows.

Graph Options

To specify graph options, choose **Options ▶ Graph Options** from the main menu. The **Graphs** dialog consists of three tabbed pages of options, discussed below.

Options

The **Options** page of the **Graphs** dialog is shown in Figure 11.12.



Graph Style: Color

□ Default to Draft Mode

Default 2D Axes: Linear

□ Condition Mode On

Condition Vars: 1

Grids per Inch: 12

Auto Pages: Within Expressi

□ Create Editable Graphics

□ Suppress Warnings

□ Use Printer Page Defaults

☑ Create New Graph Sheet

□ Create Editable Graphics

□ Resize Fonts with Graph

□ Resize Symbols with Graph

Figure 11.12: *The **Options** page of the **Graphs** dialog.*

Graph Sheet Initialization group

Graph Style Select **Color** or **Black and White** for your graphs.

Default to Draft Mode When selected, graphs are displayed onscreen in draft mode, which speeds up redraw time dramatically. Note that draft mode only affects screen resolution; printed output is always publication-quality. To toggle this option on and off, click the **Set Draft Mode** button on the **Standard** toolbar or choose **View ▶ Draft** from the main menu.

Default 2D Axes Select the type of 2D axes to be used as the default. Note that the selection you make here becomes the default type in the **Standard** toolbar. Unless you specify otherwise, the default type is **Linear**.

Conditioning Options group

Condition Mode On Conditioning mode affects how selected data are used in creating a plot with a plot button. When conditioning mode is on, the last column(s) selected are used as conditioning variables for a multipanel graph. The number of columns used for conditioning is specified in the **# Condition Vars** field below. (For more information on multipanel graphs, see Chapter 3, Traditional

Trellis Graphics, in the *Guide to Graphics.*) To toggle this option on and off, click the **Set Conditioning Mode** button on the **Standard** toolbar.

# Condition Vars Select the number of columns to use as conditioning variables when conditioning mode is on. Note that the selection you make here becomes the default value in the **Standard** toolbar. However, you can change this number at any time by selecting a different value from dropdown list.

Snap to Grid group

Grids per Inch Specify the number of invisible grid lines to use for the **Snap to Grid** option. The default is 12 grid lines per inch, or 5 grid lines per centimeter. When **Snap to Grid** is enabled, objects will "snap" to the closest intersection of these invisible horizontal and vertical grid lines.

Traditional Graphics group

Auto Pages Select **Within Expression** to have pages automatically added by default when a series of plots is created within an S-PLUS function. Note that you can override this setting in the **Page Creation** field on the **Options** page of the **Graph Sheet** dialog.

Create Editable Graphics When selected, plots created within S-PLUS functions are translated into editable graphical objects when placed in a **Graph Sheet**. Note that with this option on, creation of graphs can be very slow. With this option off, a composite graph object is placed in the **Graph Sheet**, but you can convert it into an editable graphical object at any time by right-clicking and selecting **Convert to Objects** from the shortcut menu.

Suppress Warnings When selected, all new `graphsheets()` created by default set `par(err=-1)`, which suppresses warnings such as "points out of bounds" messages.

Use Printer Page Defaults When selected, printer page defaults are used.

Statistics Dialogs Graphics group

Create New Graph Sheet When selected, a new **Graph Sheet** is created when a plot is created using one of the statistics dialogs.

Create Editable Graphics When selected, a plot created using one of the statistics dialogs is an editable graphic.

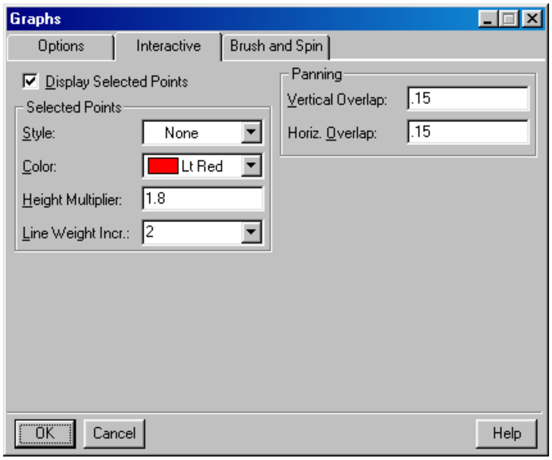
Resize with Graph group

Resize Fonts with Graph When selected, titles, comments, and other text in a graph are resized when you resize the graph.

Resize Symbols with Graph When selected, symbols in a graph are resized when you resize the graph. Note that shapes, such as the open rectangle, filled rectangle, and oval, are always resized, regardless of this setting.

Interactive

The **Interactive** page of the **Graphs** dialog is shown in Figure 11.13.



Graphs

☑ Display Selected Points

Selected Points

Style: None

Color: 🟥 Lt Red

Height Multiplier: 1.8

Line Weight Incr.: 2

Panning

Vertical Overlap: .15

Horiz. Overlap: .15

Figure 11.13: *The **Interactive** page of the **Graphs** dialog.*

Display Selected Points When selected, data points that you select are highlighted in the **Graph Sheet**. You can select data points either by selecting the desired rows in the **Data** window or by using the **Select Data Points** tool on the **Graph Tools** palette. Use the options in the next group to specify the appearance of selected points.

Selected Points group

Style Select a style from the dropdown list. If you select **None**, the selected points are highlighted but not replaced by another style.

Color Select a color from the dropdown list.

Height Multiplier Specify an amount by which to multiply the height of the point. The default value is 1.8.

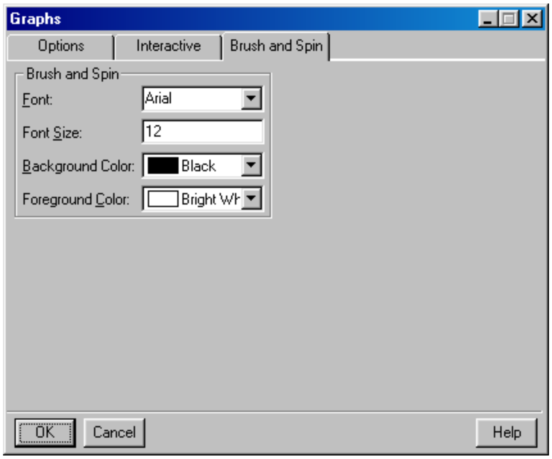
Line Weight Incr. Select a line weight for nonsolid styles.

Panning group

Use the **Vertical Overlap** and **Horiz. Overlap** fields to specify a number between 0 and .990 to be used with the vertical and horizontal **Pan** buttons on the **Graph Tools** palette. A smaller number corresponds to less overlap, a larger number to more overlap. The default value is 0.15.

Brush and Spin

The **Brush and Spin** page of the **Graphs** dialog is shown in Figure 11.14.



Brush and Spin

Font: Arial

Font Size: 12

Background Color: ■ Black

Foreground Color: □ Bright Wh

Figure 11.14: *The **Brush and Spin** page of the **Graphs** dialog.*

Use the **Font**, **Font Size**, **Background Color**, and **Foreground Color** fields to specify the settings to be used in the **Brush and Spin** window.

Graph Styles

Graph styles are used to initialize the properties of new **Graph Sheets**. Two graph styles can be defined: **Color** and **Black and White**. To specify graph styles, choose **Options ▶ Graph Styles** from the main menu and then select either **Color** or **Black and White**.

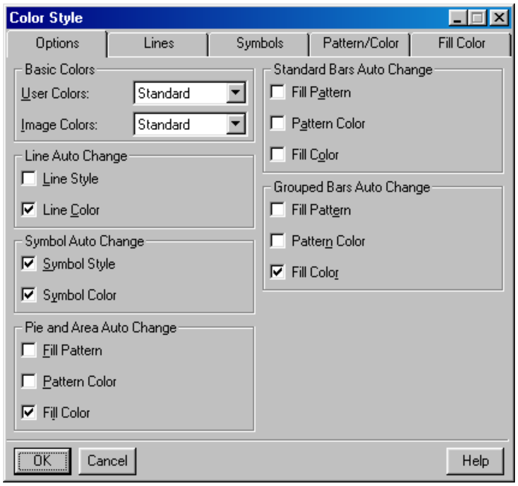
Note that the options you select in the **Color Style** and **Black and White Style** dialogs can be changed in the **Graph Sheet** dialog. You can also choose **Format ▶ Apply Style** from the main menu to modify a **Graph Sheet** to match a particular style specification.

Because the **Color Style** and **Black and White Style** dialogs are identical except for the "colors" used (in the latter case, black, white, and shades of gray), in this section we describe the various options available using the **Color Style** dialog.

The **Color Style** dialog consists of five tabbed pages of options, discussed below.

Options

The **Options** page of the **Color Style** dialog is shown in Figure 11.15.



Basic Colors
User Colors: Standard
Image Colors: Standard

Line Auto Change
□ Line Style
☑ Line Color

Symbol Auto Change
☑ Symbol Style
☑ Symbol Color

Pie and Area Auto Change
□ Fill Pattern
□ Pattern Color
☑ Fill Color

Standard Bars Auto Change
□ Fill Pattern
□ Pattern Color
□ Fill Color

Grouped Bars Auto Change
□ Fill Pattern
□ Pattern Color
☑ Fill Color

Figure 11.15: *The **Options** page of the **Color Style** dialog.*

Basic Colors group

Select the **User Colors** and **Image Colors** schemes to be used for the style. For information on editing the color palettes used in these color schemes, see page 546.

Line Auto Change group

Select **Line Style** and/or **Line Color** to have these properties change each time you add a line plot to the same graph. Line styles and colors rotate in the order specified on the **Lines** page of this dialog.

Symbol Auto Change group

Select **Symbol Style** and/or **Symbol Color** to have these properties change each time you add a plot with symbols to the same graph. Symbol styles and colors rotate in the order specified on the **Symbols** page of this dialog. If no rotation is specified, the first symbol style and color are used by default.

Pie and Area Auto Change group

Select **Fill Pattern**, **Pattern Color**, and/or **Fill Color** to have these properties change for each pie slice or area in a newly created pie or area chart. Fill patterns, pattern colors, and fill colors rotate in the order specified on the **Pattern/Color** and **Fill Color** pages of this dialog. If no rotation is specified, the first fill pattern, pattern color, and fill color are used by default.

Standard Bars Auto Change group

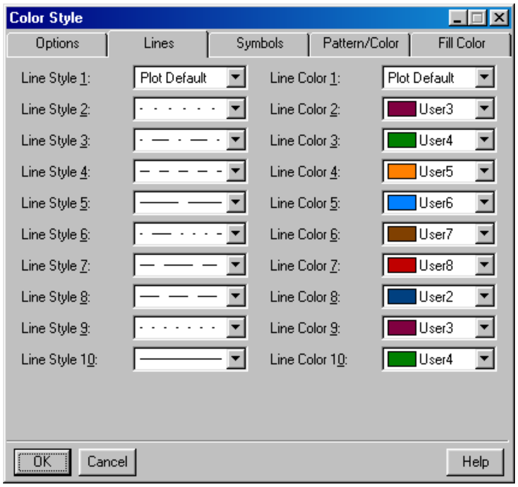
Select **Fill Pattern**, **Pattern Color**, and/or **Fill Color** to have these properties change for each bar in a newly created standard bar chart. Fill patterns, pattern colors, and fill colors rotate in the order specified on the **Pattern/Color** and **Fill Color** pages of this dialog. If no rotation is specified, the first fill pattern, pattern color, and fill color are used by default.

Grouped Bars Auto Change group

Select **Fill Pattern**, **Pattern Color**, and/or **Fill Color** to have these properties change for each bar in each group in a newly created grouped bar chart. Fill patterns, pattern colors, and fill colors rotate in the order specified on the **Pattern/Color** and **Fill Color** pages of this dialog. If no rotation is specified, the first fill pattern, pattern color, and fill color are used by default.

Lines

The **Lines** page of the **Color Style** dialog is shown in Figure 11.16.



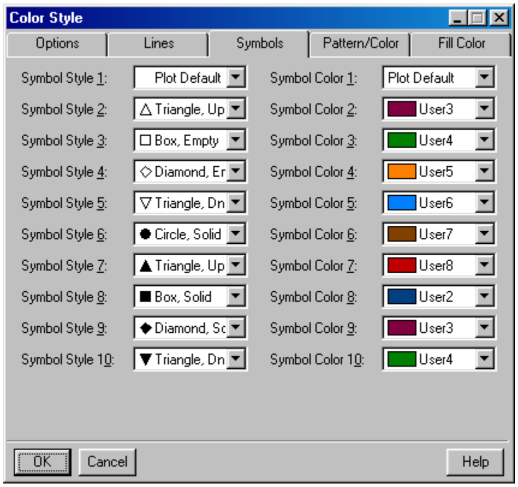
Line Style 1:	Plot Default	Line Color 1:	Plot Default
Line Style 2:	· · · · · ·	Line Color 2:	User3
Line Style 3:	· — · — ·	Line Color 3:	User4
Line Style 4:	– – – – –	Line Color 4:	User5
Line Style 5:	—— ——	Line Color 5:	User6
Line Style 6:	· — · · · ·	Line Color 6:	User7
Line Style 7:	— —— —	Line Color 7:	User8
Line Style 8:	— — —	Line Color 8:	User2
Line Style 9:	· · · · · · ·	Line Color 9:	User3
Line Style 10:	————	Line Color 10:	User4

Figure 11.16: *The* ***Lines*** *page of the* ***Color Style*** *dialog.*

The **Lines** page has ten style and ten color fields. Use these fields to select line styles and colors in the order in which you want them to cycle.

Symbols

The **Symbols** page of the **Color Style** dialog is shown in Figure 11.17.

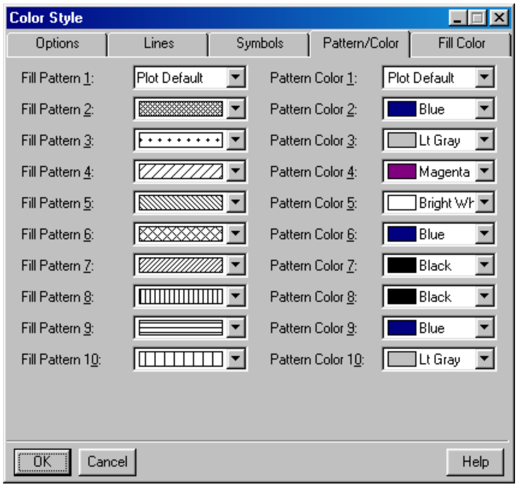


Symbol Style 1:	Plot Default	Symbol Color 1:	Plot Default
Symbol Style 2:	△ Triangle, Up	Symbol Color 2:	User3
Symbol Style 3:	□ Box, Empty	Symbol Color 3:	User4
Symbol Style 4:	◇ Diamond, Er	Symbol Color 4:	User5
Symbol Style 5:	▽ Triangle, Dn	Symbol Color 5:	User6
Symbol Style 6:	● Circle, Solid	Symbol Color 6:	User7
Symbol Style 7:	▲ Triangle, Up	Symbol Color 7:	User8
Symbol Style 8:	■ Box, Solid	Symbol Color 8:	User2
Symbol Style 9:	◆ Diamond, Sc	Symbol Color 9:	User3
Symbol Style 10:	▼ Triangle, Dn	Symbol Color 10:	User4

Figure 11.17: *The* ***Symbols*** *page of the* ***Color Style*** *dialog.*

The **Symbols** page has ten style and ten color fields. Use these fields to select symbol styles and colors in the order in which you want them to cycle.

Pattern/Color The **Pattern/Color** page of the **Color Style** dialog is shown in Figure 11.18.



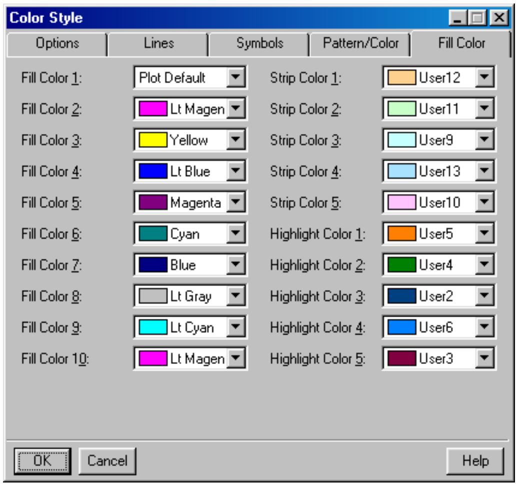
Fill Pattern 1:	Plot Default	Pattern Color 1:	Plot Default
Fill Pattern 2:	▒	Pattern Color 2:	Blue
Fill Pattern 3:	⋯	Pattern Color 3:	Lt Gray
Fill Pattern 4:	▨	Pattern Color 4:	Magenta
Fill Pattern 5:	▧	Pattern Color 5:	Bright Wh
Fill Pattern 6:	▩	Pattern Color 6:	Blue
Fill Pattern 7:	▨	Pattern Color 7:	Black
Fill Pattern 8:	▥	Pattern Color 8:	Black
Fill Pattern 9:	▤	Pattern Color 9:	Blue
Fill Pattern 10:	▥	Pattern Color 10:	Lt Gray

Figure 11.18: *The **Pattern/Color** page of the **Color Style** dialog.*

The **Pattern/Color** page has ten fill pattern and ten pattern color fields. Use these fields to select fill patterns and pattern colors in the order in which you want them to cycle.

Fill Color

The **Fill Color** page of the **Color Style** dialog is shown in Figure 11.19.



Fill Color 1: Plot Default
Fill Color 2: Lt Magen
Fill Color 3: Yellow
Fill Color 4: Lt Blue
Fill Color 5: Magenta
Fill Color 6: Cyan
Fill Color 7: Blue
Fill Color 8: Lt Gray
Fill Color 9: Lt Cyan
Fill Color 10: Lt Magen

Strip Color 1: User12
Strip Color 2: User11
Strip Color 3: User9
Strip Color 4: User13
Strip Color 5: User10
Highlight Color 1: User5
Highlight Color 2: User4
Highlight Color 3: User2
Highlight Color 4: User6
Highlight Color 5: User3

Figure 11.19: *The **Fill Color** page of the **Color Style** dialog.*

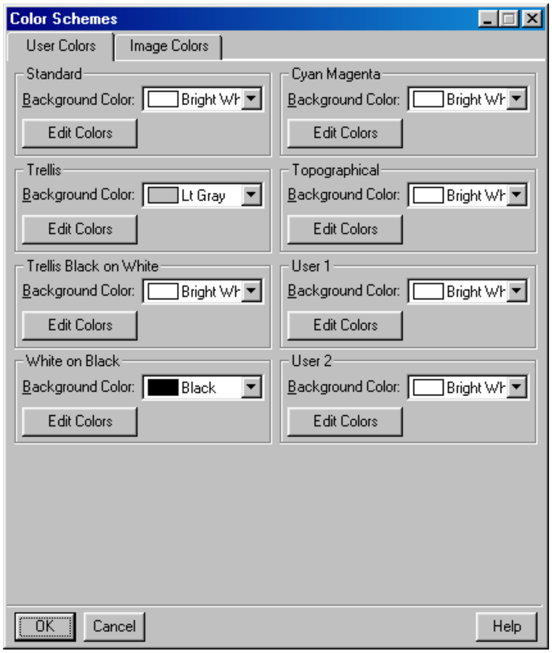
The **Fill Color** page has ten fill color fields, five strip color fields (for strip labels in multipanel plots), and five highlight color fields. Use these fields to select fill colors, strip colors, and highlight colors in the order in which you want them to cycle.

Color Schemes

There are eight available color schemes for user and image colors that are used when defining graph styles. To specify color schemes, choose **Options ▶ Color Schemes** from the main menu. The **Color Schemes** dialog consists of two tabbed pages of options, discussed below.

User Colors

The **User Colors** page of the **Color Schemes** dialog is shown in Figure 11.20.



Standard
Background Color: Bright Wh

Cyan Magenta
Background Color: Bright Wh

Trellis
Background Color: Lt Gray

Topographical
Background Color: Bright Wh

Trellis Black on White
Background Color: Bright Wh

User 1
Background Color: Bright Wh

White on Black
Background Color: Black

User 2
Background Color: Bright Wh

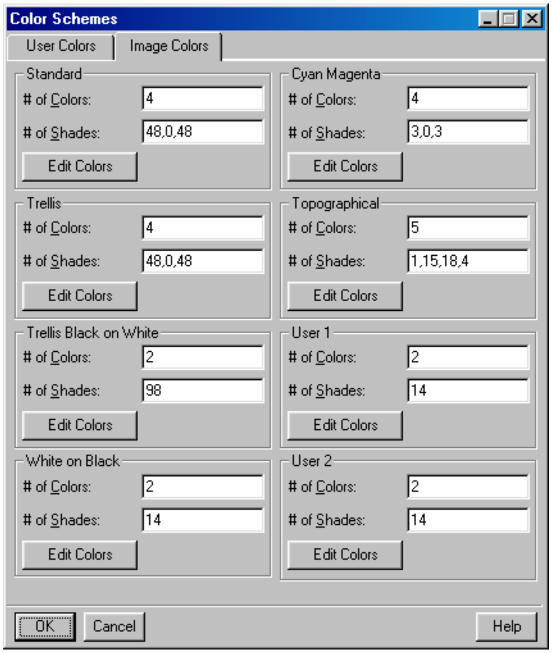
Figure 11.20: *The **User Colors** page of the **Color Schemes** dialog.*

The **User Colors** scheme you select on the **Options** page of the **Color Style** or **Black and White Style** dialog is used to set the user colors in any newly created **Graph Sheet**. These colors appear in the color lists for all of the graphical objects within the **Graph Sheet** as **User1**, **User2**, etc.

Use the fields on the **User Colors** page to set the background color for each of the eight color schemes. To modify the **User Colors** for a color scheme, click the **Edit Colors** button and use the **Color** dialog to edit the color palette.

Image Colors

The **Image Colors** page of the **Color Schemes** dialog is shown in Figure 11.21.



Standard
# of Colors: 4
# of Shades: 48,0,48

Cyan Magenta
# of Colors: 4
# of Shades: 3,0,3

Trellis
# of Colors: 4
# of Shades: 48,0,48

Topographical
# of Colors: 5
# of Shades: 1,15,18,4

Trellis Black on White
# of Colors: 2
# of Shades: 98

User 1
# of Colors: 2
# of Shades: 14

White on Black
# of Colors: 2
# of Shades: 14

User 2
# of Colors: 2
# of Shades: 14

Figure 11.21: *The **Image Colors** page of the **Color Schemes** dialog.*

Image colors are a series of fill colors that can be used for draped surfaces, flooded contours, and levels plots. The specification of image colors consists of up to sixteen core colors and a list defining the number of shades or color gradations between each core color.

Use the fields on the **Image Colors** page to set the number of colors and shades for each of the eight color schemes. To modify the **Image Colors** for a color scheme, click the **Edit Colors** button and use the **Color** dialog to edit the color palette for core image colors.

# of Colors Specify the number of core colors to use in the image colors definition. Only the number of colors specified in this field will be used in the image colors scheme.

# of Shades This field is defined by a list of numbers separated by commas indicating how many shades to use between each core color. For example, if you specify three core colors–black, red, and white–

and “5,15” for number of shades, a total of 23 colors will be used for the image colors scheme–black, five shades between black and red, and fifteen shades between red and white.

Auto Plot Redraw

You can choose whether to have your plots redrawn automatically after each change you make. This feature is turned on by default, but you may want to turn it off to save redraw time for computationally intensive or complicated plots.

The **Auto Plot Redraw** feature can be toggled on and off by choosing **View ▶ Auto Plot Redraw** from the main menu. When you have it turned off and want to redraw a plot, choose **View ▶ Redraw Now** from the main menu.

CUSTOMIZING YOUR SESSION AT STARTUP AND CLOSING

Setting Your Startup Options

If you routinely set one or more options each time you start Spotfire S+, or you want to automatically attach library sections or S-PLUS chapters, you can store these choices and have Spotfire S+ set them automatically whenever the program starts.

When you start Spotfire S+, the following initialization steps occur:

1. Basic initialization brings the evaluator to the point of being able to evaluate expressions.
2. Spotfire S+ then looks for the standard initialization file **%SHOME%/S.init**. This is a text file containing S-PLUS expressions. The default initialization file performs the remaining steps in this list.
3. If your system administrator has performed any site customization in the file **%SHOME%/local/S.init**, the actions in that file are evaluated next. You can edit this to set actions to be performed at startup for every project.
4. Spotfire S+ then determines your working data.
5. Spotfire S+ evaluates the customization file **S.init** if it is found in the current folder. The **S.init** file is a text file containing S-PLUS expressions that are executed at the start of your session. Note that this file is different from **%SHOME%/S.init**, which affects all users' sessions.
6. Spotfire S+ evaluates the function `.First.Sys`, which includes evaluating the local system initialization function `.First.local`, if it exists.
7. Spotfire S+ evaluates the environment variable S_FIRST, if set, or the first `.First` function found in the search paths set by steps 3–5.

In most cases, the initialization process includes only one of steps 7 and 9 above. Thus, you will probably use only one of the following mechanisms to set your startup options:

- Create an S-PLUS function named `.First` containing the desired options.

- Create a text file of Spotfire S+ tasks named **S.init** in your current folder.
- Set the Spotfire S+ environment variable S_FIRST as described below.

The .First function is the traditional Spotfire S+ initialization tool. The **.S.init** file has the advantage of being a text file that can easily be edited outside of Spotfire S+. The S_FIRST variable is a convenient way to override .First for a specific Spotfire S+ session.

Creating the .First Function

Here is a sample .First function that starts the default graphics device:

```
> .First <- function() graphsheet()
```

After creating a .First function, you should always test it immediately to make sure it works. Otherwise, Spotfire S+ will not execute it in subsequent sessions.

Creating an S.init File

Here is a sample **S.init** file that sets the output width for the session as well as the default displayed precision:

```
   options(width=55, digits=4)
```

You can create an **S.init** file in any folder in which you want to start Spotfire S+. Spotfire S+ checks the current folder to see whether this initialization file exists and evaluates it if it finds it.

Setting S_FIRST

To store a sequence of commands in the S_FIRST variable, use the following syntax on the Spotfire S+ command line:

```
SPLUS.EXE S_FIRST=Spotfire S+ expression
```

For example, the following command tells Spotfire S+ to start the default graphics device:

```
SPLUS.EXE S_FIRST=graphsheet()
```

To avoid misinterpretation by the command line parser, it is safest to surround complex S-PLUS expressions with a single or double quote (whichever you do *not* use in your S-PLUS expression). For example, the following command starts Spotfire S+ and modifies several options:

```
SPLUS.EXE S_FIRST='options(digits=4);options(expressions=128)'
```

Due to operating system specific line length limitations, or for ease of use, you can also place the commands in a file and put the filename on the command line, preceded by the `@` symbol:

```
Echo options(digits=4);options(expressions=128) >
     c:\myInitialization.txt
SPLUS.EXE S_FIRST=@c:\myInitialization.txt
```

You can also combine several commands into a single S-PLUS function and then set S_FIRST to this function. For example:

```
> startup <- function() { options(digits=4)
+ options(expressions=128)}
```

You can call this function each time you start Spotfire S+ by setting S_FIRST as follows:

```
SPLUS.EXE S_FIRST=startup()
```

Variables cannot be set while Spotfire S+ is running, just at initialization. Any changes to S_FIRST will only take effect upon restarting Spotfire S+.

Setting Your Closing Options

When Spotfire S+ quits, it looks in your data folder for a function called `.Last`. If `.Last` exists, Spotfire S+ runs it. A `.Last` function can be useful for cleaning up your folder by removing temporary objects or files. For example:

```
> .Last <- function () dos(paste("del", getenv("S_Tmp"),
+ "/*.Tmp, dep+""), Trans=T).
```

Note

If the `.Last` function contains errors, when you quit the Spotfire S+ GUI, these errors are reported in a dialog box. Click **OK** to close the GUI, and then restart to correct the errors in `.Last`.

INDEX