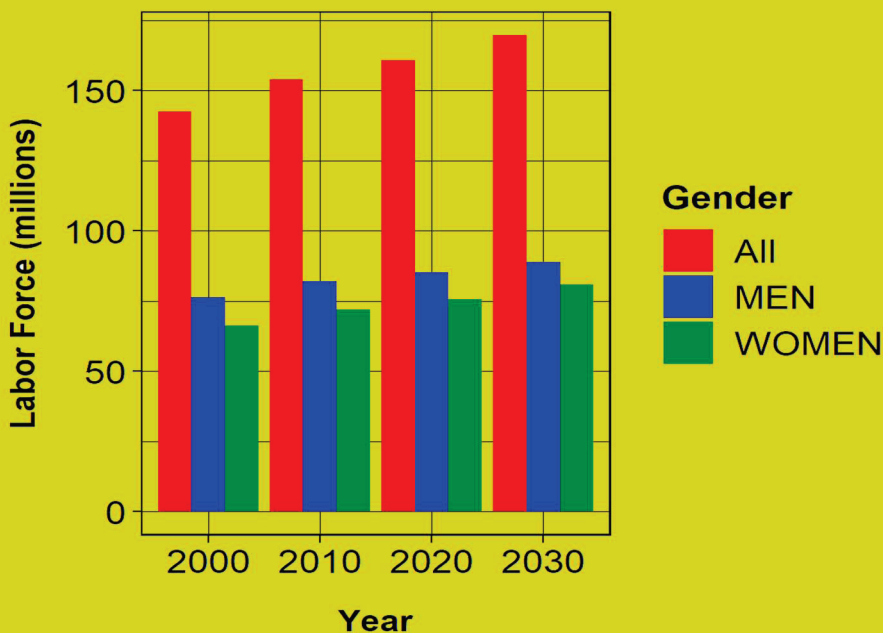


# Using R For Excel Analysts

## Tools for Increasing Productivity



Kilem L. Gwet, Ph.D.

**USING R  
FOR  
EXCEL ANALYSTS**

Tools for Increasing Productivity

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# **USING R FOR EXCEL ANALYSTS**

Tools for Increasing Productivity

**Kilem Li Gwet, Ph.D.**

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Maryland, USA

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# Preface

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In this book, you will learn how to use R to automate tedious and repetitive tasks in **Excel** and **Google Sheets**. In addition to using R to leverage Excel's capability in data management and analysis, you will discover all the power of R in data visualization and programmatic reporting. You will see how R can automate the entire workflow from raw data to the final report in PDF, HTML or Word formats. This will allow you to update your analysis report with new data in one click. The use of **OneDrive** and **GoogleDrive** as a way of sharing your reports with others is extensively discussed. As a bonus, I added a chapter on the important issue of version control with **GitHub**. Here is where you will learn how to manage the different versions of your R scripts and share them with others if needed, in a collaborative work environment. These are some of the essential skills you must develop to be an effective analyst in the new world of data science.

Despite its limitations, Microsoft Excel remains one of the most widely-used data analysis tool among professionals in the business world. It is intuitive and the learning curve is not steep. Moreover, you typically get what you see. You can add formulas in a worksheet, and obtain new results in realtime when you change your input data. Therefore, Excel cannot be ignored when it comes to distributing your work to a large audience. If you want to share data tables or small datasets, then using the spreadsheet (Excel or Google Sheets) remains one of the best options at your disposal.

However, the use of Excel as your main tool for analysis will make it more

difficult for you to tackle several challenges frequently encountered in data analysis projects. Here are 2 examples:

- *Data Management*

Most basic data analysis tasks in Excel start with a static rectangular data table in a worksheet. Excel formulas such as =SUM(E3:H3) can be added to the worksheet to do some calculations. However, your input data must sometimes come from many different worksheets or workbooks. This requires that you sort and merge different data sources before you can build a complete dataset, which is ready for analysis. If manually done, such a task can become tedious and error-prone.

To resolve this problem, Excel offers 2 solutions. You can use Excel Visual Basic for Applications (or VBA), which is the programming language that comes with Excel. Alternatively, you can use Excel Power Query, which is an Excel Add-on that can help you resolve this problem through a point-and-click menu driven approach. While VBA requires some programming skills, Power Query also allows you to write queries in addition to allowing you to do the work manually.

R is a non-Excel option for performing the same tasks and much more. R offers more diverse and more powerful data management tools than Excel. With R being an open source software, independent developers across the world add new tools to R almost every day. Moreover, you can receive free help from an extensive community of R users.

- *Special Analyses*

When you have a standard analysis to conduct involving basic arithmetic and commonly-use statistical techniques, you will likely find an Excel formula you can use. However, if you want to implement a special technique, then only the use of VBA will solve your problem. I am an experienced VBA programmer and was able to develop some fancy applications with it. VBA learning curve is steep and developing a VBA solution can be

time-consuming due to the lack of a rich library of functions and the inability to use solutions developed by others in a convenient manner.

Developing an R solution for implementing a special analysis will generally be much faster than developing a similar VBA solution. Almost all statistical techniques you can think of are already implemented in R either through base R or through one of the many packages developed by third parties.

I strongly recommend investing time to learn R and use it as your language of choice for automating Excel and Google Sheets. Your code will be independent of Excel and Google Sheets, can easily be perused by colleagues, will be easy to maintain, and above all, will be highly portable. The skills you will develop, will be transferable outside of the Microsoft and Google ecosystems of software products.

R is free and RStudio is a user-friendly platform for writing R code. With the development of RStudio Cloud, the Internet is all you need to run R. That is, downloading and installing the desktop versions of R and RStudio is no longer necessary to use R and automate Excel, Google Sheets and more. There is so much you can do with R that only your ambition and imagination can limit you. I hope this book will trigger your interest in R as a supplement to Excel, and stimulate your willingness to become a better data analyst.

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Kilem Li Gwet, Ph.D.



# About the Author

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I am a mathematical statistician and a quantitative management consultant. I obtained my PhD in Mathematics and Statistics in 1997 from the Carleton University's School of Mathematics and Statistics, Ottawa (Canada). My initial specialization was the design and analysis of statistical surveys. However, after working for various organizations for over 20 years, my interests have considerably shifted in the past few years. My focus now is on the fields of statistical computing (with R, SAS and Excel), and inter-rater reliability analysis.

In the field of inter-rater reliability, I wrote many books and published several papers in peer-reviewed journals. I am also the developer of the widely-used Excel and R-based Cloud versions of the **AgreeStat360** software dedicated to the analysis of inter-rater reliability data. The link <https://agreestat.com/> gives you a glimpse into my work in the field of inter-rater reliability analysis.



