# S Programming Techniques 

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## The $S$ Language

- The S language has been developed since the late 1970s by John Chambers and his collaborators at Bell Laboratories.
- The language has been through major evolutionary changes, but has been relatively stable since the mid 1990s.
- The language combines ideas from a number of sources (e.g. APL, Lisp, Awk, ...) and provides an environment for quantitative computations.


## S Implementations

- S-PLUS - a commercialised version of Chambers' work which is marketed by Insightful.
- $R$ - an independent free-software implementation which was created at the University of Auckland and is now developed by an international collaboration of researchers.
- Each of these versions has advantages and problems.
- What I will talk about in this workshop will generally apply to both implementations. Where there are differences I will try to point them out.


## References

- The New S Language. (The "Blue" Book.) R. Becker, J. Chambers and A. Wilks.
- Statistical Models in S. (The "White" Book.) J. Chambers and T. Hastie Eds.
- Programming With Data. (The "Green" Book.) J. Chambers.
- Modern Applied Statistics with S-PLUS. W. Venables and B. Ripley.
- S Programming.
W. Venables and B. Ripley.


## The Nature of Programming

The task of writing a program has two sub-tasks:

1. Describing precisely what is to be done.
2. Describing the data to be used.

These tasks can't be done separately. The choices made in either of the sub-tasks influence the choices made in the other.

$$
\begin{aligned}
\text { algorithms } & + \text { data structures }=\text { programs } \\
& - \text { Niklaus Wirth }
\end{aligned}
$$

## Data Structures

- S possesses a rich set of self-describing data structures.
- These structures describe the data to be manipulated by the language and also the language itself.
- The fact that the structures are self-describing means that there is no need for a use to declare the types of variables.
- It is possible that in future optional type declarations will be introduced to help compile the S language into efficient byte or machine code.


## Atomic Data Structures

- The most basic data type in S is the atomic vector.
- Such vectors contain an indexed set of values which are all of the same type:
- logical
- numeric
- complex
- character
- The numeric type can be further broken down into integer, single and double types (but this is only important when making calls to C or Fortran.)


## Creating Vectors

- Many S functions create vectors to hold the results they compute.
- There are also functions which can be used to create "empty" vectors.
> vector ("numeric", 10)
[1] 0000000000
> numeric(10)
[1] 0000000000
> vector("logical", 0)
logical(0)


## Patterned Vectors

- The functions rep and seq can be used to create vectors containing patterns of values.
- Simple replication.
$>\operatorname{rep}(1: 2,3)$
[1] 121212
- More complex replication.
> rep(c("A", "B"), $C(2,3))$
[1] "A" "A" "B" "B" "B"
> rep(c("A", "B"), each=3)
[1] "A" "A" "A" "B" "B" "B"


## Vector Structures

- S retains the notion of vector structures from its earliest implementation.
- A vector structure is a vector with some additional information attached to it as an attribute list.
- Most uses of vector structures have been deprecated in favour of object-oriented alternatives.
- The major remaining use of vector structures is as the representation of arrays.


## Arrays

- $S$ regards an array as consisting of a vector containing the array's elements together with a dimension (or dim) attribute.
- A vector can be given dimensions by using the functions array or matrix, or by directly attaching them with the dim function.
- The elements in the underlying vector correspond to the elements of the array with earlier subscripts moving faster.


## Examples

- Direct array creation.
$>x<-1: 10$
$>\operatorname{dim}(x)<-c(2,5)$
> x

|  | $[, 1]$ | $[, 2]$ | $[, 3]$ | $[, 4]$ | $[, 5]$ |
| ---: | ---: | ---: | ---: | ---: | ---: |
| $[1]$, | 1 | 3 | 5 | 7 | 9 |
| $[2]$, | 2 | 4 | 6 | 8 | 10 |

- Array creation using matrix.
$>\mathbf{x}=$ matrix (1:10, nrow $=2$ )


## Naming

- The elements of a vector can be given names by using the names function.
$>\mathrm{x}=\mathrm{c}(10,20)$
> names(x) = c("First", "Second")
$>\times$

$$
\begin{array}{rr}
\text { First } & \text { Second } \\
10 & 20
\end{array}
$$

- Array extents can be named by using the dimnames function or the dimnames argument to matrix or array. Extent names are given as a list, with each list element being a vector of names for the corresponding extent.

Example

$$
\begin{aligned}
& >x<-\operatorname{array}(1: 8, \operatorname{dim}=c(2,2,2)) \\
& \text { > dimnames (x) <- list(c("A", "B"), NULL, } \\
& \text { + } \quad \text { C("X", "Y")) } \\
& >x \\
& \text {, , X } \\
& \text { [,1] [,2] } \\
& \text { A } \quad 1 \quad 3 \\
& \text { B } 24 \\
& \text {, , Y } \\
& \text { [,1] [,2] } \\
& \text { A } \quad 5 \quad 7 \\
& \text { B } 68
\end{aligned}
$$

## Subsetting

- One of the most powerful features of $S$, is its ability to manipulate subsets of vectors and arrays.
- The $S$ subsetting facility is derived from and extends that of APL.
- Subsetting is indicated by [ ].


## Subsetting With Positive Indexes

- A subscript consisting of a vector of positive integer values is taken to indicate a set of indexes to be extracted.
> x <- 1:10
$>x[1: 3]$
[1] 123
- A subscript which is larger than the length of the vector being subsetted produces an NA in the returned value.
$>\times[9: 11]$
[1] 910 NA


## Subsetting With Positive Indexes

- Subscripts which are zero are ignored and produce no corresponding values in the result.
> $x[0: 1]$
[1] 1
- Subscripts which are NA produce an NA in the result.
$>x[c(1,2, N A)]$
[1] 12 NA


## Assignments With Positive Indexes

- Subset expressions can appear on the left side of an assignment. In this case the given subset is assigned the values on the right (recycling the values if necessary).

$$
>x[1: 3]<-10
$$

$>\times$

$$
\begin{array}{lllllllllll}
{[1]} & 10 & 10 & 10 & 4 & 5 & 6 & 7 & 8 & 9 & 10
\end{array}
$$

- If a zero or NA occurs as a subscript in this situation, it is ignored.


## Subsetting With Negative Indexes

- A subscript consisting of a vector of negative integer values is taken to indicate the indexes which are not to be extracted.
$>\times[-(1: 3)]$
$\begin{array}{llllllll}{[1]} & 4 & 5 & 6 & 7 & 8 & 9 & 10\end{array}$
- Subscripts which are zero are ignored and produce no corresponding values in the result.
- NA subscripts are not allowed.
- Positive and negative subscripts cannot be mixed.


## Assignments With Negative Indexes

- Negative subscripts can appear on the left side of an assignment. In this case the given subset is assigned the values on the right (recycling the values if necessary).
> x <- 1:10
> $x[-(1: 3)]$ <- 10
$>\times$

$$
\begin{array}{lllllllllll}
{[1]} & 1 & 2 & 3 & 10 & 10 & 10 & 10 & 10 & 10 & 10
\end{array}
$$

- Zero subscripts are ignored.
- NA subscripts are not permitted.


## Subsetting By Logical Predicates

- Vector subsets can also be specified by a logical vector of trues and falses.
$>x<-1: 10$
> $x[x$ > 5]
[1] $678 c c c c c$
- NA values used as logical subscripts produce NA values in the output.
- The subscript vector can be shorter than the vector being subsetted. The subscripts are recycled in this case.
- The subscript vector can be longer than the vector being subsetted. Values selected beyond the end of the vector produce NAs.


## Subsetting By Name

- If a vector has named elements, it is possible to extract subsets by specifying the names of the desired elements.

```
> x <- 1:10
> names(x) <- LETTERS[1:10]
> x[C("A","B")]
        A B
        12
```

- If several elements have the same name, only the first of them will be returned.
- Specifying a non-existent name produces an NA in the result.


## Exercises

1. Determine (precisely) how $S$ handles non-integer subscripts (e.g. 1.2). How might this produce problems?
2. What value do the following expressions produce?
> $x<-1: 10$
> $x[-11]$
3. How could you choose all elements of a vector which have odd subscripts? Even subscripts?
4. How are complex subscripts treated?

## Subsetting Arrays

- Rectangular subsets of arrays obey similar rules to those which apply to vectors.
- One point to note is that arrays can be treated as either matrices or vectors. This can be quite useful.
$>\mathrm{x}$ <- matrix(1:9, ncol = 3)
> $x[x>6]$
[1] 789
> $x[$ row $(x) \quad>\operatorname{col}(x)]<-0$
$>\times$

|  | $[, 1]$ | $[, 2]$ | $[, 3]$ |
| :--- | ---: | ---: | ---: |
| $[1]$, | 1 | 4 | 7 |
| $[2]$, | 0 | 5 | 8 |
| $[3]$, | 0 | 0 | 9 |

## Mode and Storage Mode

- The functions mode and storage .mode return information about the types of vectors.
$>\operatorname{mode}(1: 10)$
[1] "numeric"
> storage.mode (1:10)
[1] "integer"
> mode("a string")
[1] "character"
> mode(TRUE)
[1] "logical"


## Automatic Type Coercion

- $S$ will automatically coerce data to the appropriate type when this is necessary.
> $1+\mathrm{T}$
[1] 2
Here the logical value $\boldsymbol{T}$ has been coerced to the numeric value 1 so that addition can take place.
- Some common coercions are

$$
\begin{aligned}
& \text { logical } \rightarrow \text { numeric } \\
& \text { logical, numeric } \rightarrow \text { complex } \\
& \text { logical, numeric, complex } \rightarrow \text { character } \\
& \text { numeric, complex } \rightarrow \text { logical }
\end{aligned}
$$

## Type Coercion and NA Values

- Logical values can be coerced to any other atomic mode. Because of this, the constant NA has been made a logical value.
$>$ mode (NA)
[1] "logical"
- When NA is used in an expression, the mode of the result is usually determined by the mode of the other operands.
$>1+N A$
[1] NA
$>$ mode (1 + NA)
[1] "numeric"


## An R / S-PLUS Difference

- S-PLUS does not have an NA indicator for character strings. It coerces NA values to the character string "NA". There are potential problems with this approach. > is.na(as.character(NA))
[1] F
- $R$ does have a special NA value for character strings and so does differentiate NA and "NA". > is.na(as.character(NA))
[1] TRUE


## Explicit Type-Coercion

- The function as.logical, as.integer, etc., return a copy of values passed to them, coerced to the specified type.
> as.numeric (c("1", "10.5", "text"))
[1] 1.010 .5 NA
- Warning: These functions discard all labelling and dimensioning information.
$>x$ <- 1:5
$>$ names $(x)$ <- LETTERS[1:5]
$>$ as.character (x)
[1] "1" "2" "3" "4" "5"


## Explicit Type-Coercion

- The functions mode and storage.mode (or more precisely mode<- and storage.mode<-) can be used to alter the storage mode of a variable.
> $x$ <- 1:5
$>$ names $(x)$ <- LETTERS[1:5]
$>\mathbf{x}$
A B C D E
12345
> storage.mode(x) <- "character"
$>\times$

$$
\begin{array}{rrrrr}
\text { A } & \text { B } & \text { C } & \text { D } & \text { E } \\
" 1 " & " 2 " & " 4 " & " 5 "
\end{array}
$$

- These functions preserve attributes like labelling and dimensioning.


## Lists

- In addition to atomic vectors, S has a number of recursive data structures. The most important of these is the list.
- A list is a vector which can contain vectors and other lists as its elements.
> lst <- list(a = 1:3, b = "a list")
> lst
\$a:
[1] 123
\$b:
[1] "a list"


## Subsetting and Lists

- Lists are useful as containers for grouping related things together (many S functions return lists as their values).
- Because lists are a recursive structure it is useful to have two ways of extracting subsets.
- The [ ] form of subsetting produces a sub-list of the list being subsetted.
- The [ [ ] ] form of subsetting can be used to extract a single element from a list.


## List Subsetting Examples

- Using the [ ] operator to extract a sublist.
> lst[1]
\$a:
[1] 123
- Using the [ [ ] ] operator to extract a list element.
> lst[[1]]
[1] 123
- As with vectors, indexing using logical expressions and names are also possible.


## List Subsetting Syntactic Sugar

- The dollar operator provides a short-hand way of accessing list elements by name. The expression > lst[["a"]]
is completely equivalent to the expression > lst\$a
- The abbreviation is provided because accessing list elements by name is a very common operation in $S$.


## Data Frames

- Data frames are a special $S$ structure used to hold a set of related variables. They are the $S$ representation for a statistical data matrix.
- Data frames can be treated like a matrix, and indexed with two subscripts. The first subscript refers to the observation, the second to the variable.
- In fact, this is an illusion maintained by the $S$ object system. Data frames are really lists, and list subsetting can also be used on them.


## Control-Flow

- S has a number of special control-flow structures which make it possible to express quite complex computations in the $S$ language.
- Iteration is provided by the for, while and repeat statements.
- Conditional evaluation is provided by the if statement and the switch function.
- Of these capabilities, for and if are by far the most commonly used.


## For Statements

- For statements have the basic form:
for (var in vector) \{
statements
\}
The effect of this is to set the value of the variable var successively to each of the elements in vector and then evaluating statements.
- This looks similar to the for statement found in languages such as $C$ and $C++$, but it is closer to the foreach statement of Perl.


## Examples

- Summing the values in a vector ( $C$ style).
sum <- 0

```
for(i in 1:length(x)) {
```

    sum <- sum + \(x\) [i]
    \}

- Summing the values in a vector (Perl style).
sum <- 0
for (elt in $x$ ) \{ sum <- sum + elt
\}
- The second of these is more efficient.


## If Statements

- If statements have the basic form
if(test) \{
statements
\} else \{
statements
\}
- If the first element of test is true, the first group of statements is executed, otherwise, the second group of statements is executed.
- The else clause is optional.


## Examples

- Here is a typical use of if.

```
if (any(x < 0))
```

    stop("negative values encountered")
    - Here is a choice between actions.

$$
\begin{array}{r}
r<- \text { if }(\operatorname{all}(x \text { }>=0)) \\
\\
\text { sqrt }(x) \text { else } \\
\\
\text { sqrt }(x+0 i)
\end{array}
$$

The layout here is important. The else must fall on the same line as the preceding statement (assuming the code above is not enclosed within $\{$ and $\}$ ).

## The Switch Function

- The switch function uses the value its first argument to determine which of its remaining arguments to evaluate and return. The first argument can be either an integer index, or a character string to be used in matching one of the following arguments.

```
centre <- function(x, type) {
            switch(type,
                mean = mean(x),
                    median = median(x),
                    trimmed = mean(x, trim = .1))
```

\}

- Calling centre with type=1 or type="mean" produces the same result.


## Efficiency Issues

- S provides a full set of control-flow statements but they execute very slowly because $S$ is (currently) an interpreted language.
- $R$ is somewhat faster than $S$-PLUS at looping, but it is still two orders of magnitude slower than compiled $C$ or Fortran.
- For time-critical applications, it can be useful to obtain measures of how fast a particular piece of code runs as a guide choosing a good computational method.
- The functions dos.time, unix.time (in S-PLUS) and system.time (in $R$ ) provide a way of timing how long it takes to evaluate a given expression.


## Timing Experiments

- Timing experiments can be a good way of checking alternative ways of carrying out computations.
$>$ sum <- 0
> x <- rnorm(10000)
> unix.time (\{s <- 0
$+\quad$ for (i in 1:length(x))
$+\quad \mathbf{s}<-\mathbf{s}+\mathbf{x}[i]\})$
[1] 0.500 .000 .520 .000 .00
> unix.time (\{s <- 0
$+\quad$ for (v in $x$ )
$+\quad \mathbf{s}<-\mathbf{s}+\mathbf{v}\})$
[1] 0.190 .000 .190 .000 .00


## The "Apply" Family

- Because looping tends to be slow in $S$, there is a family of functions which can be used to avoid explicit looping.
- The members of the family differ in the types of data structure they work on and in the degree to which they simplify the answers returned.
- The members are:
- apply for arrays
- tapply for ragged arrays
- lapply and sapply for lists


## Using Apply

- apply applies a function over the margins of an array.
- For example, the call:
> apply(x, 2, mean)
computes the column means of a matrix $\mathbf{x}$, while > apply(x, 1, median)
computes the row medians.
- apply is implemented in a way which avoids the overhead associated with explicit looping.


## An Additive Table Decomposition

- Given data in a matrix $\mathbf{x}$, this code carries out an overall
+ row + column decomposition.
overall <- mean (x)
row <- apply (x, 1, mean) - overall
col <- apply (x, 2, mean) - overall
res <- x - outer(row, col, "+") - overall
- The generalised outer product function outer is used here to produce a matrix, the same shape as $\mathbf{x}$, containing the appropriate sums of row and column effects.
- Something similar can be used to produce a simple implementation of median polish.


## Writing Functions

- Writing S functions provide a means of adding new functionality to the language.
- Functions that a user writes have the same status as those which are provided with S.
- Reading the functions provided with the S system provides a good way of learning how to write functions.
- If a user chooses, she/he can make modifications to the functions provided by the system and use the modified versions in preference to the system ones.


## A Simple Function

- Here is function which squares its argument.
> square <- function(x) $\mathbf{x}$ * $\mathbf{x}$
> square (10)
[1] 100
- Because the underlying arithmetic in S is vectorised, so is this function.
> square (1:4)
[1] 143916


## Composition of Functions

- Once a function is defined, it is possible to call it from other functions.
$>$ sumsq <- function(x) sum(square (x))
$>$ sumsq(1:10)
[1] 385


## Example: Factorials

- Iteration.

```
fac <- function(n) \{
    ans <- 1
    for (i in seq(n)) ans <- ans * i
        ans
    \}
```

- Recursion.
fac <- function(n)

```
if (n <= 0) 1 else n * fac(n - 1)
```


## Example: Factorials

- Vectorised arithmetic.
fac <- function(n) prod(seq(n))
- Using special functions.
fac <- function(n) gamma(n+1)
- The version of fac based on the gamma function is one of the fastest and is the most flexible.


## Exercise

Time each of the four factorial functions shown above. This is a little trickier than it sounds.

## General Functions

- In general, as S function has the form:
function( arglist ) body
where arglist is a comma-separated list of formal parameters and body is an S expression which computes the value of the function.
- Functions are evaluated by associating the values of the arguments with the names of the formal parameters and then evaluating the body of the function using these associations.


## The Evaluation Process

If the function hypot defined by:
hypot <- function (a, b)
sqrt (a^2 + b^2)
the $S$ expression hypot $(3,4)$ is evaluated as follows.

- Temporarily create variables $\mathbf{a}$ and $\mathbf{b}$, which have the values 3 and 4.
- Use these variable definitions to evaluate the expression sqrt ( $a^{\wedge} 2+b^{\wedge} 2$ ) to obtain the value 5 .
- When the evaluation is complete remove the temporary definitions of $\mathbf{a}$ and $\mathbf{b}$.


## Optional Arguments

- S has a notion of default argument values.
- These make it possible for arguments to take on reasonable default values if no value was specified in a call to the function.
- In the following function, the second argument takes on the value 0 if no argument is specified.
sumsq <- function(x, about=0) sum ( $\left.(x-a b o u t)^{\wedge} 2\right)$
- This means that the expressions sumsq $(\mathbf{1}: \mathbf{1 0}, \mathbf{0})$ and sumsq ( $1: 10$ ) will return the same value.


## Optional Arguments

- The default values for arguments can be specified by an S expression involving the variables available inside the body of the function.

```
sumsq <- function(x, about=mean(x))
    sum((x - about)^2)
```

- Recursive references within default arguments are not permitted. E.g. At least one argument must be provided to the following function.
silly <- function ( $a=b, b=a$ ) $a+b$


## Argument Matching

- Because it is not necessary to specify all the arguments to S functions, it is important to be clear about which argument corresponds to which formal parameter of the function.
- The solution is to indicate which formal parameter is associated with an argument by providing a (partial) name for the argument.
- In the case of the sumsq function, the following are equivalent specifications.

```
sumsq(1:10, mean(1:10))
    sumsq(1:10, about=mean(1:10))
    sumsq(1:10, a=mean(1:10))
```


## Lazy Evaluation

- S differs from many computer languages because the evaluation of function arguments is lazy.
- In other words, arguments are not actually evaluated until they are required.
- It can even be the case that arguments are never evaluated.


## Example

- Here is a variation of the sumsq function.

```
sumsq <- function(x, about=mean(x)) {
    x <- x[!is.na(x)]
    sum((x - about)^2)
}
```

- This function first removes any NA values from $\mathbf{x}$ before computing its answer.
- Lazy evaluation means that the about value is computed from the cleaned $\mathbf{x}$.


## Exercises

1. Modify the sumsq function so that the removal of NA values is optional.
2. Write a new function which computes the deviations of the values in $\mathbf{x}$ about about. The value returned by the function should be "just like" x. How should missing values be handled?

## Reading System Functions

- The built-in functions supplied with $S$ form a valuable resource for learning about $S$ programming.
- In many cases you may be surprised by the complexity of what appear to be trivial functions (try factorial or choose). Such complexity is usually introduced over time as a result of user feedback.
- Be warned that there can still be bugs in system functions.

```
Example: The Ifelse Function
> ifelse
function(test, yes, no)
\{
    answer <- test
    test <- as.logical(test)
    \(\mathrm{n}<-\) length (answer)
    if(length (na <- which.na(test)))
        test[na] <- F
    answer[test] <- rep (yes, length \(=n\) ) [test]
    if(length (na))
        test[na] <- T
    answer[!test] <- rep(no, length \(=n\) ) [!test]
    answer
```


## Exercise

Look at these results from the S-PLUS ifelse function (the results from R are identical).
> ifelse("TRUE", 1,0$)$
[1] "1"
> ifelse("FALSE", 1, 0)
[1] "0"
What is causing this problem and how can it be fixed?

## Computing on the Language

- Because of argument evaluation is lazy, S allows programmers to get access to the unevaluated arguments.
- This is made possible by the substitute function.
$>\mathrm{g}$ <- function(x) substitute (x)
$>\operatorname{g}(x[1]+y * 2)$
$\mathbf{x [ 1 ]}+\mathrm{y}$ * 2
- substitute is used conjunction with deparse to obtain a character string representation of an argument.
> $g$ <- function(x) deparse (substitute(x))
$>g\left(x[1]+y^{*} 2\right)$
"x[1] + y * 2"


## Computing on the Language

- The substitute function can take a call and substitute the symbolic representation of several arguments.
> $g$ <- function(a, b) substitute (a+b)
> $\mathrm{g}\left(\mathrm{x}^{*} \mathrm{x}, \mathrm{y} \mathrm{y}^{\mathrm{y}}\right.$ )
$\mathbf{x}$ * $\mathbf{x}+\mathbf{y}$ * $\mathbf{y}$
- One particularly useful trick is to use the . . . argument in a substitute expression.
> g <- function(...) substitute(list(...))
> $g(a=10, b=11)$
list (a = 10, b = 11)


## Manipulating Language Calls

- The objects returned by substitute are vectors of mode call.
- Calls are similar to lists in their behaviour and can be subscripted in the same way.
- The call $\mathbf{a + b}$ has three elements which are in order $\mathbf{+}$, $\mathbf{a}$ and $\mathbf{b}$ (i.e. a lisp-like representation is used).
- The variable names appearing in calls are special S objects of mode name. They can be created from character strings with the function as . name.


## Creating Calls

- Calls can be created with the function vector.

```
> u = vector("call" 3)
> u
(, )
> u[[1]] <- as.name("f")
> u[[2]] <- as.name("x")
> u[[3]] <- as.name("y")
> u
f(x, y)
```

but usually manipulations are carried out existing calls.

## Evaluating Calls

- Given a call it can be very useful to evaluate that call. This is done with the eval function.
- eval takes the call, together with values for any variables present in the call and produces the value that this defines.
> u <- substitute (a+b)
> eval(u, list (a=10, b=20))
[1] 30
- A third argument to eval can be used to supply additional places which can be used to find values for variables.


## Example: Transforming Data Frames

- Peter Dalgaard has written a small function to make it easy to manipulate the variables in a data frame.
- This function will transform and replace existing variables or create new ones to be added.
- Here is an example of applying this function to the S data set air, which gives information about air pollution.
> new.air <- transform(air,
+ new = -ozone,
+ temperature $=($ temperature-32)/1.8)


## Example: The Transform Function

```
transform <- function (x, ...) {
    e <- eval(substitute(list(...)), x,
        sys.frame(sys . parent()))
    tags <- names (e)
    inx <- match(tags, names(x))
    matched <- !is.na(inx)
    if (any(matched)) {
        x[inx[matched]] <- e[matched]
        x <- data.frame(x)
    }
    if (!all (matched))
        data.frame(x, e[!matched])
    else x
}
```


## Scoping

- We've seen that evaluation is the process of determining the value of a symbolic expression.
- In order for evaluation to take place, values must be determined for the variables in the expression.
- The scope of a variable is that portion of a program where that variable refers to the same value.
- The two dialects of $S$ differ in their scoping rules.


## Example

- In the following fragment:

```
x <- 10
y <- 20
f <- function(y) {
    x + y
}
```

There is global variable called $x$.
There is global variable called $y$ and a local variable called $y$.

## Scoping In S-PLUS

- The scoping rules in S-PLUS are simple.
- Variables are either local to the function they are defined in or they are global.
- The process of determining the value of a variable is as follows.

1. Look for a local variable - if there is one, use its value.
2. If there is no local variable, use the value of the global variable.

- There are some effects of these scoping rules which are counter-intuitive.


## Scoping Problems

- The follow implementation of binomial coefficients does not work in S-PLUS.
choose <- function ( $\mathrm{n}, \mathrm{k}$ ) \{
fac <- function(n)
if( $n<=1$ ) 1
else n * fac (n - 1)
fac (n) / (fac (k) * fac (n - k))
\}
- Why does the function fail?


## Consequences of S-PLUS Scoping

- The scoping rules of S-PLUS encourage the use of many globally defined functions, even when those functions are never called directly.
- This is because it is difficult to hide related helper functions inside "wrapper" functions.
- The use of this style produces namespace clutter and effects like the accidental masking of functions.
- Object-oriented programming extensions help a little.


## Scoping in $\mathbf{R}$

- R uses what is called static or lexical scoping (another term is block structure).
- Variables defined in outer blocks are visible inside inner blocks.
- This is a natural extension to the S-PLUS way of scoping.
- The hiding of helper functions within wrappers is encouraged.
- This promotes better software design and alleviates namespace clutter.
- It also has some more "interesting" consequences.


## Example: Gaussian Likelihoods

```
mkNegLogLik <- function(x) {
    function(mu, sigma) {
        sum(sigma + 0.5 * ((x - mu)/sigma)^2)
    }
}
q <- mkNegLogLik(rnorm(100))
```

