

Rotman

**Master of
Management
Analytics**

INTRO TO JMP – PART 1

Bootcamp

August 2, 2023 Prepared by Jay / [TDMDAL](#)



Rotman School of Management
UNIVERSITY OF TORONTO

What is JMP

- Predictive analytics software from SAS Institute
 - data manipulation
 - [visualization](#)
 - statistical & machine learning modeling
 - reporting
- Intuitive point-and-click interface for beginners
 - Analytics with zero/minimum coding
- Flexible and extensible for advanced users
 - JMP Scripting Language (JSL) for automating or extending point-and-click functionality
 - Connect to Database engine, Matlab, R, Python, Excel, Web API, etc.
 - Connect to the richness of SAS: retrieve SAS data and submit SAS code

See key features of JMP Pro at [JMP Pro website](#).


Why JMP

- Get you started as quickly as possible
 - **amazing** intuitive point-and-click interface
 - quickly get things done
- JMP is a great tool
 - sufficient for many analytics tasks
 - good [visualization](#) for reporting/presentation
 - good for initial exploration or rapid prototyping
 - even you plan to use more advanced tools later
- Guide you to learn other tools
 - How do I achieve this JMP data manipulation/modeling/visualization in Python or R?
 - Try to separate the concepts from the software

Learning by Doing

- This workshop is task/problem based;
 - I show you how to do a task
 - You will try yourself on a variation of the task
 - you will discover JMP on your own
- We will mostly focus
 - On learning the tools to do
 - data manipulation
 - visualization and report
 - simple modeling
 - Not on statistical or modeling theories

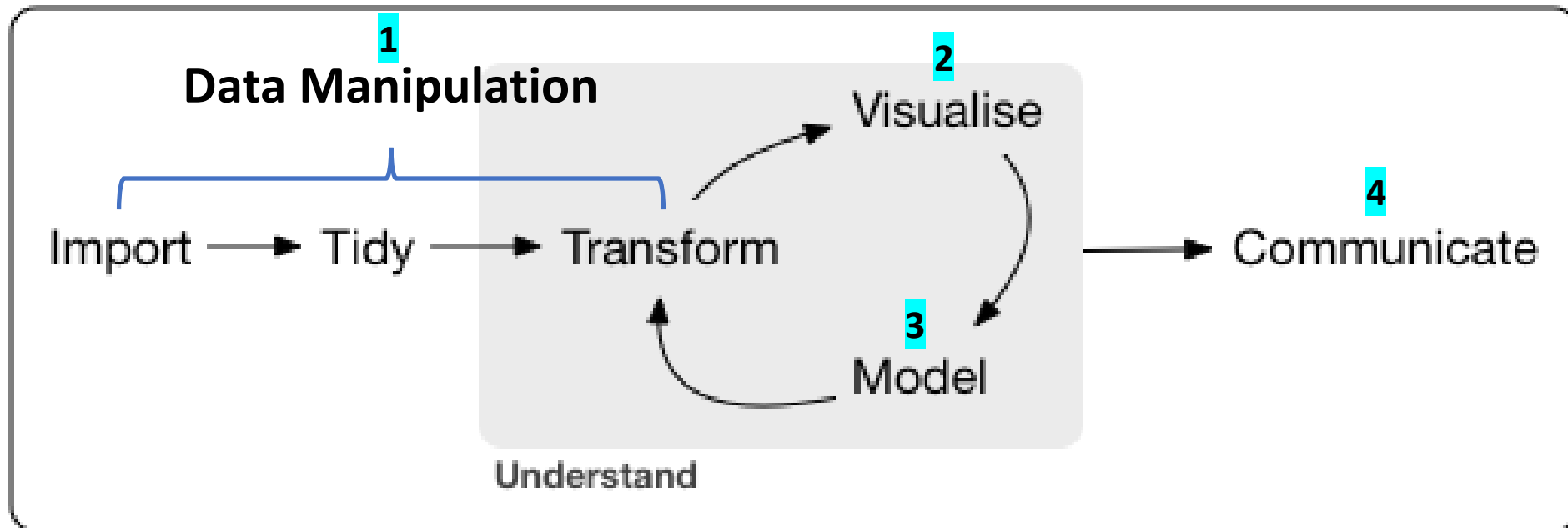
Learning Resources (jmp.com)

- [JMP Academic \(Students\)](#) 
 - [JMP Basics](#) (great beginner videos!)
 - [Learning Resources for Students](#) ([learning library](#), [academic webinar](#), etc.)
- [JMP User Community](#)
- [JMP Documentation Library](#) (many examples using included datasets)
 - Getting started document: [Discovering JMP](#)
 - Basics
 - [Using JMP](#) (data table)
 - [Basic Analysis](#)
 - [Essential Graphing](#)
 - Specific topics
 - [Fitting Linear Models](#)
 - [Predictive and Specialized Modeling](#)

Plan

- Session 1
 - **Workflow overview**
 - Basic data manipulation
- Session 2
 - Join data tables
 - JMP graphing
- Session 3
 - Modelling
 - JMP Journal
 - JMP Scripting Language

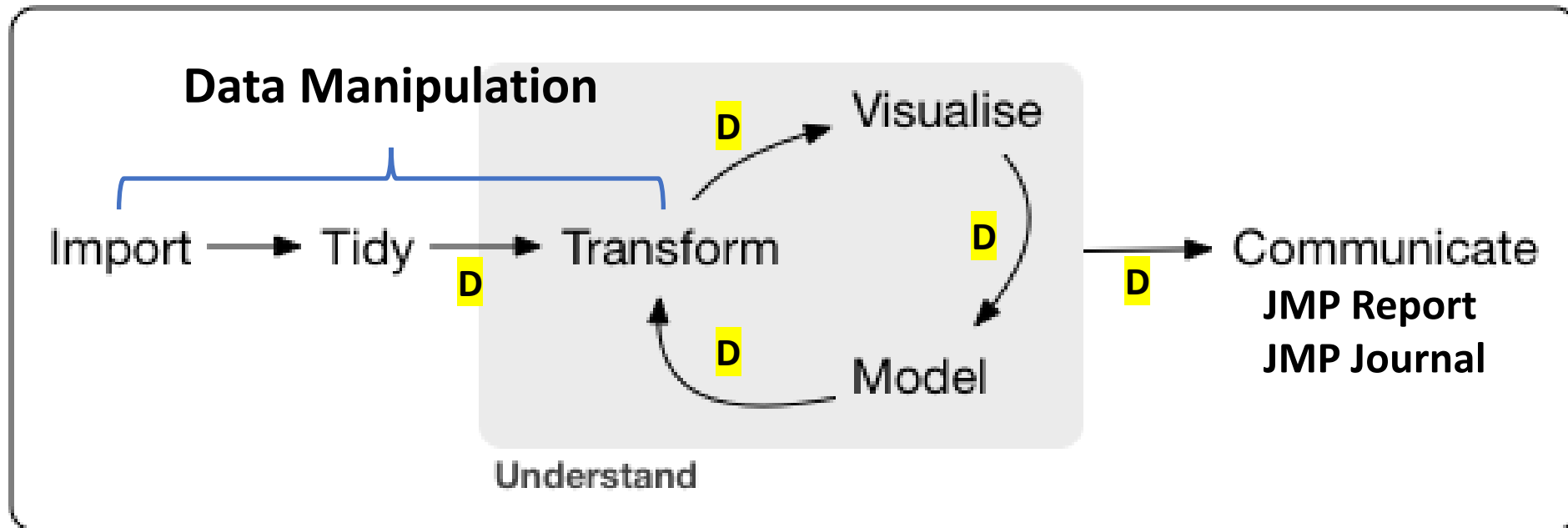
Overview: A Typical Workflow



point-and-click & programming

Concept and graph adapted from <https://r4ds.had.co.nz/introduction.html>

Overview: JMP Dynamic Link



point-and-click & programming

D: Dynamic Link

Overview: A Simple Workflow Demo

- A simple example
 - import data
 - fit y by x (Profit by # Employ; linear model; “removing” an outlier)
- Data (data/basics/companies_mma.csv)

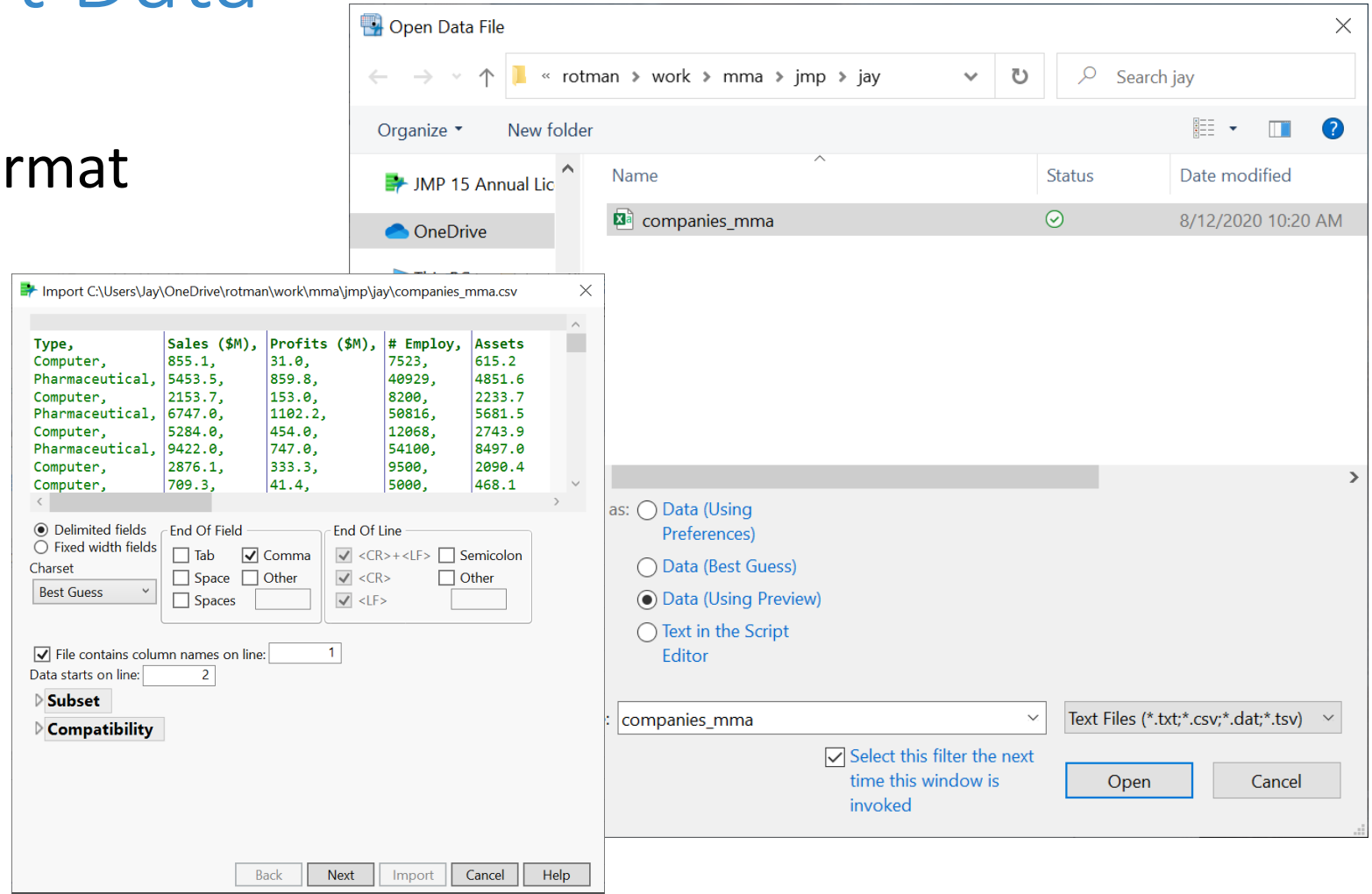
```
Type,Sales ($M),Profits ($M),# Employ,Assets
Computer,855.1,31.0,7523,615.2
Pharmaceutical,5453.5,859.8,40929,4851.6
Computer,2153.7,153.0,8200,2233.7
...
```

Your Turn (Hands-on; 5mins)

- Repeat the demo I just did
 - import the dataset to a JMP data table
 - fit y by x (Profit by # Employ)
 - exclude an outlier; redo the fit
 - save the analysis script in the data table
- Challenge: run a multiple linear regression
 - predict Profits using number of employees (# Employ) and Sales

Review: Import Data

- Support many file format
 - csv
 - Excel
 - json
 - many more



<https://www.jmp.com/support/help/en/17.1/#page/jmp/import-your-data.shtml#>

Review: Data Table

- Three panels on the left
 - Table (JMP Script)
 - Columns
 - Rows
- Column Info
- Excluding rows

The screenshot displays the JMP Pro interface for a data table named 'companies_mma'. The main window shows a table with columns: Type, Sales (\$M), Profits (\$M), # Employ, and Assets. The '# Employ' column is selected. A dialog box titled '# Employ - JMP Pro' is open, showing the column's properties. The dialog includes fields for Column Name, Data Type, Modeling Type, and Format, along with checkboxes for Lock and Use thousands separator. The dialog also has OK, Cancel, Apply, and Help buttons.

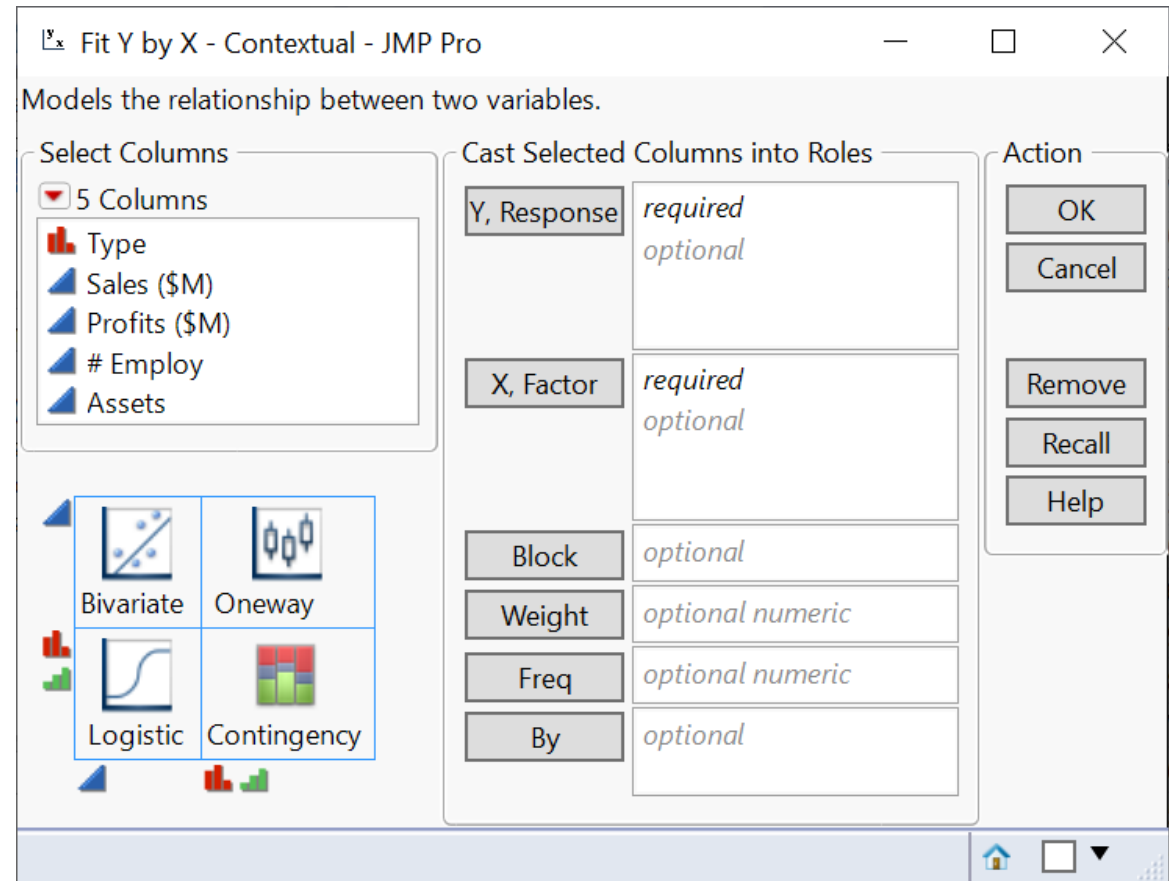
	Type	Sales (\$M)	Profits (\$M)	# Employ	Assets
16	Pharmaceutical	969.2	227.4	3418	784
17	Pharmaceutical	6698.4	1495.4	34400	6756.7
18	Computer	5956	412	56000	4500
19	Pharmaceutical	5903.7	681.1	42100	8324.8
20	Computer	2959.3	252.8	31404	5611.1
21	Pharmaceut				
22	Computer				
23	Pharmaceut				
24	Computer				
25	Computer				
26	Computer				
27	Computer				
28	Computer				
29	Pharmaceut				
30	Computer				
31	Pharmaceut				
32	Computer				

Column Properties for '# Employ':

- Column Name: # Employ
- Lock:
- Data Type: Numeric
- Modeling Type: Continuous
- Format: Best, Width: 12
- Use thousands separator (,):

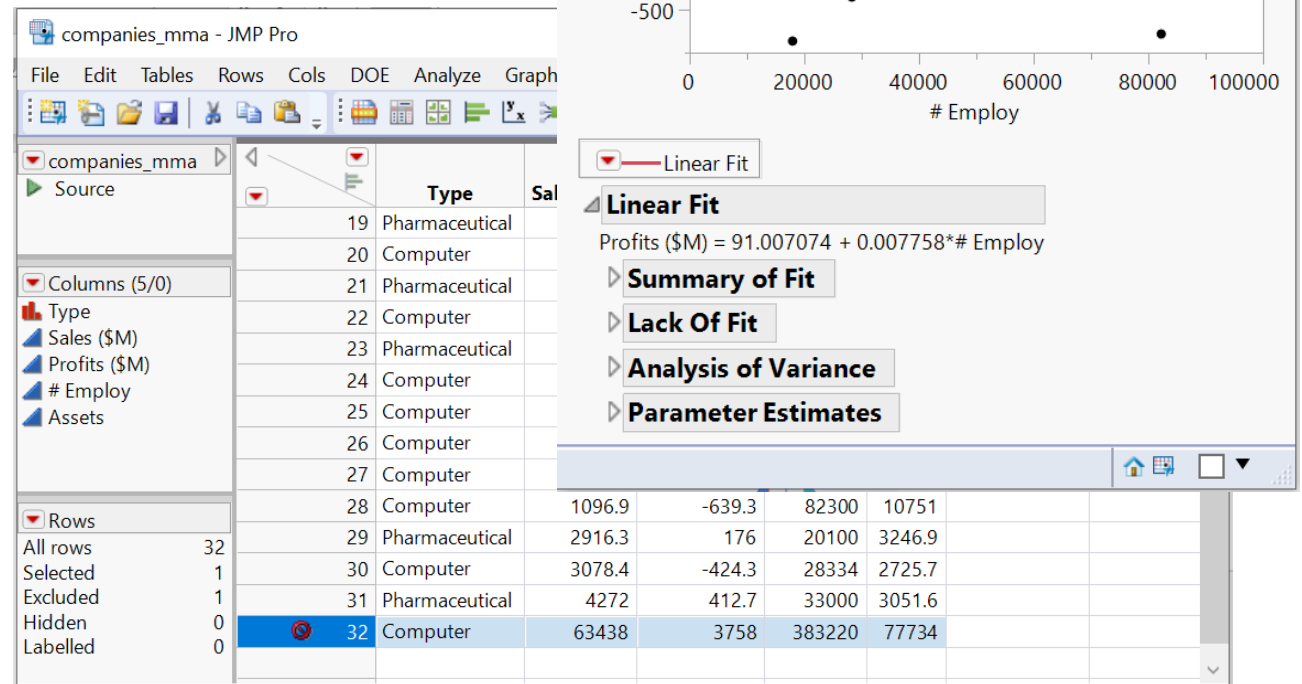
Review: Fit Y by X Platform

- Relationships between two variables
- Model depends on Y and X variable types
 - 4 main types
 - many model choices under bivariate model



Review: Analysis Report

- Analysis reports are dynamic
 - a report and its underlying data are linked
- Many actions are available under the red triangle buttons
 - redo analysis
 - save script
- Right click gives many actions too



Review: Save Analysis

- Save data table
- Capture a script for analysis report

The screenshot shows the JMP Pro interface. The main window displays a data table with the following columns: Type, Sales (\$M), Profits (\$M), and # Employ. The data table contains 19 rows of data. A secondary window titled "Bivariate Fit of Profits (\$M) By # Employ" is open, showing a scatter plot of Profits (\$M) versus # Employ. A red regression line is fitted to the data points. A context menu is open over the plot, with "Save Script" selected. A sub-menu is visible with the following options: "To Data Table...", "To Journal", "To Script Window", "To Report", and "To Clipboard".

Type	Sales (\$M)	Profits (\$M)	# Employ	
1 Computer	855.1			
2 Pharmaceutical	5453.5			
3 Computer	2153.7			
4 Pharmaceutical	6747			
5 Computer	5284			
6 Pharmaceutical	9422			
7 Computer	2876.1			
8 Computer	709.3			
9 Computer	2952.1			
10 Computer	784.7			
11 Computer	1324.3			
12 Pharmaceutical	4175.6			
13 Computer	11899			
14 Computer	873.6			
15 Pharmaceutical	9844			
16 Pharmaceutical	969.2	227.4	3418	784
17 Pharmaceutical	6698.4	1495.4	34400	6756.7
18 Computer	5956	412	56000	4500
19 Pharmaceutical	5903.7	681.1	42100	8324.8

Review: Fit Model - Multiple Linear Reg

- Analyze > Fit Model

Fit Model - JMP Pro

Model Specification

Select Columns

- 5 Columns
- Type
- Sales (\$M)
- Profits (\$M)
- # Employ
- Assets

Pick Role Variables

Y Profits (\$M)
optional

Weight *optional numeric*

Freq *optional numeric*

Validation *optional*

By *optional*

Personality: Standard Least Squares

Emphasis: Effect Leverage

Help Run

Recall Keep dialog open

Remove

Construct Model Effects

Add Sales (\$M)
Employ

Cross

Nest

Macros ▾

Degree 2

Attributes ▾

Transform ▾

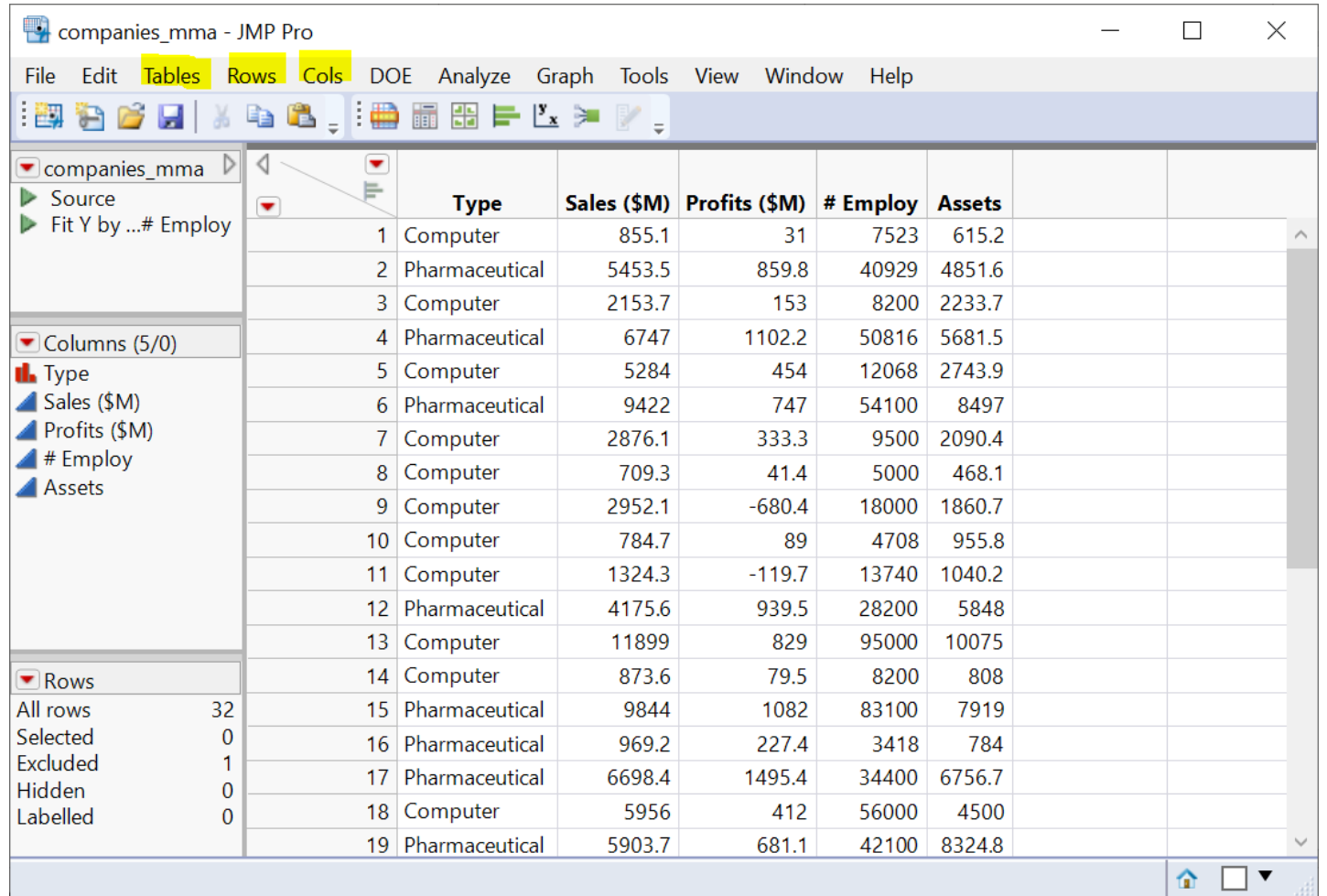
No Intercept

Plan

- Session 1
 - Workflow overview
 - **Basic data manipulation**
- Session 2
 - Join data tables
 - JMP graphing
- Session 3
 - Modelling
 - JMP Journal
 - JMP Scripting Language

Data Manipulation - Overview

- Three levels
 - Columns
 - col + row operations
 - JMP creates a new table
 - Rows
 - Tables



companies_mma - JMP Pro

File Edit **Tables** **Rows** **Cols** DOE Analyze Graph Tools View Window Help

companies_mma

- Source
 - Fit Y by ...# Employ
- Columns (5/0)
 - Type
 - Sales (\$M)
 - Profits (\$M)
 - # Employ
 - Assets
- Rows
 - All rows 32
 - Selected 0
 - Excluded 1
 - Hidden 0
 - Labelled 0

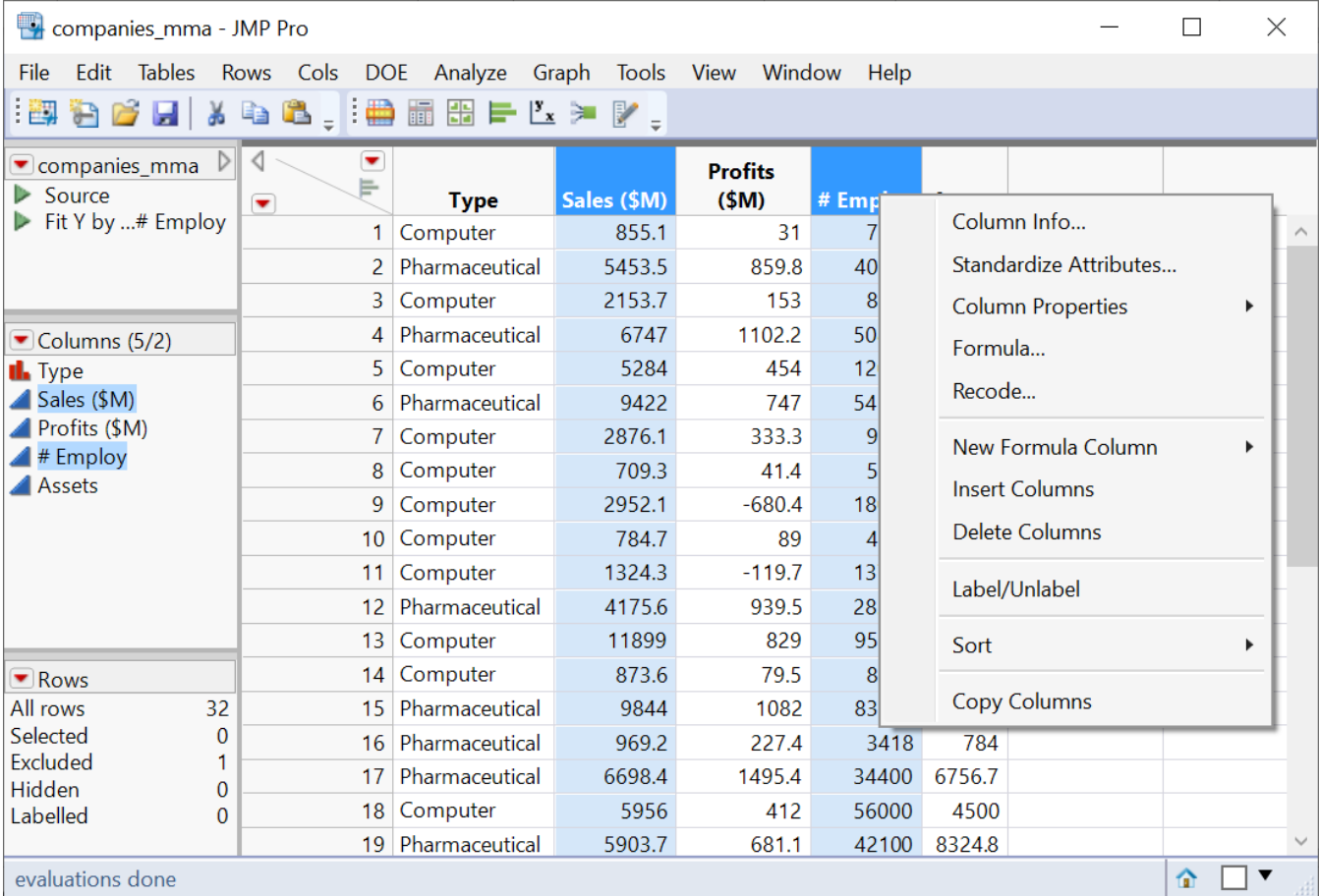
	Type	Sales (\$M)	Profits (\$M)	# Employ	Assets
1	Computer	855.1	31	7523	615.2
2	Pharmaceutical	5453.5	859.8	40929	4851.6
3	Computer	2153.7	153	8200	2233.7
4	Pharmaceutical	6747	1102.2	50816	5681.5
5	Computer	5284	454	12068	2743.9
6	Pharmaceutical	9422	747	54100	8497
7	Computer	2876.1	333.3	9500	2090.4
8	Computer	709.3	41.4	5000	468.1
9	Computer	2952.1	-680.4	18000	1860.7
10	Computer	784.7	89	4708	955.8
11	Computer	1324.3	-119.7	13740	1040.2
12	Pharmaceutical	4175.6	939.5	28200	5848
13	Computer	11899	829	95000	10075
14	Computer	873.6	79.5	8200	808
15	Pharmaceutical	9844	1082	83100	7919
16	Pharmaceutical	969.2	227.4	3418	784
17	Pharmaceutical	6698.4	1495.4	34400	6756.7
18	Computer	5956	412	56000	4500
19	Pharmaceutical	5903.7	681.1	42100	8324.8

Data Manipulation - Basics

- **Cols**
 - select or de-select columns
 - drop/delete columns
 - add new columns
- Rows
 - order/sort rows (see table operation)
 - filter rows (we have tried excluding certain rows)
- Tables
 - subset a table
 - sort a table
 - aggregate/summarize (by group)

Select and Delete Columns

- Select or deselect columns
 - along with doing analysis
 - in data table window
- Drop/delete columns
 - in data table window
 - Tables -> Subset
 - A new data table will be created

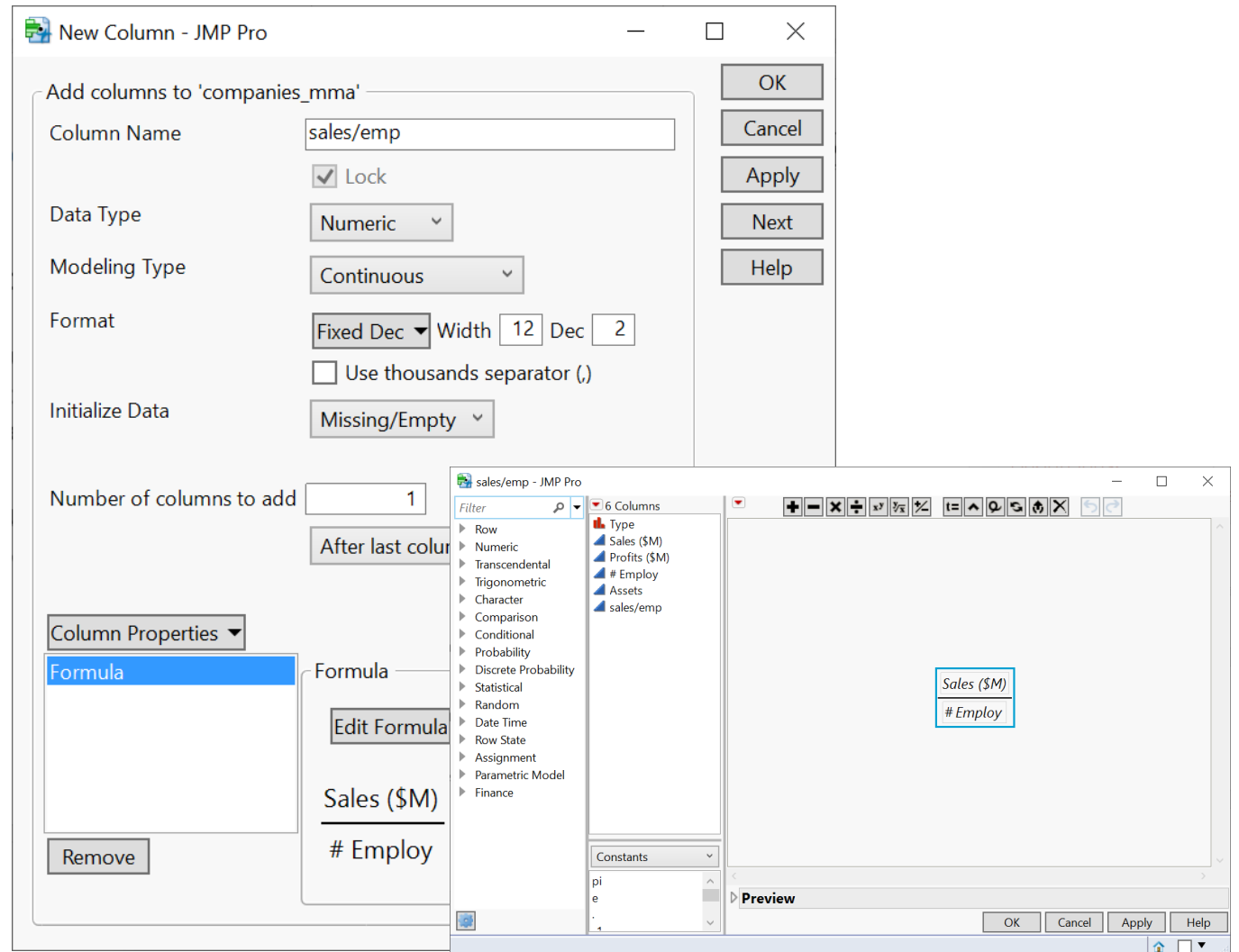


The screenshot shows the JMP Pro interface with a data table named 'companies_mma'. The table has columns: Type, Sales (\$M), Profits (\$M), # Employ, and Assets. The first 15 rows are visible. A context menu is open over the 'Delete Columns' option. The menu items are: Column Info..., Standardize Attributes..., Column Properties, Formula..., Recode..., New Formula Column, Insert Columns, Delete Columns, Label/Unlabel, Sort, and Copy Columns.

	Type	Sales (\$M)	Profits (\$M)	# Employ	Assets
1	Computer	855.1	31	7	
2	Pharmaceutical	5453.5	859.8	40	
3	Computer	2153.7	153	8	
4	Pharmaceutical	6747	1102.2	50	
5	Computer	5284	454	12	
6	Pharmaceutical	9422	747	54	
7	Computer	2876.1	333.3	9	
8	Computer	709.3	41.4	5	
9	Computer	2952.1	-680.4	18	
10	Computer	784.7	89	4	
11	Computer	1324.3	-119.7	13	
12	Pharmaceutical	4175.6	939.5	28	
13	Computer	11899	829	95	
14	Computer	873.6	79.5	8	
15	Pharmaceutical	9844	1082	83	
16	Pharmaceutical	969.2	227.4	3418	784
17	Pharmaceutical	6698.4	1495.4	34400	6756.7
18	Computer	5956	412	56000	4500
19	Pharmaceutical	5903.7	681.1	42100	8324.8

Create a New Column (Demo)

- Create a new column
 - Col name: sales/emp
 - Data type: Numeric
 - Col property: Formula
 - Formula: Sales (\$M) / # Employ
- A note on column names
 - JMP is flexible with col names
 - In general, special symbols in col names is not a good idea
- Formula editor



Your Turn (Hands-on)

- Create a new column
 - Col name: size
 - Data type: Character
 - Col property: formula
- It's a categorical variable
 - if # Employ < 20000, then size = "small"
 - if 20000 <= #Employ < 40000, then size = "medium"
 - if #Employ >= 40000, then size = "big"
- Save the result

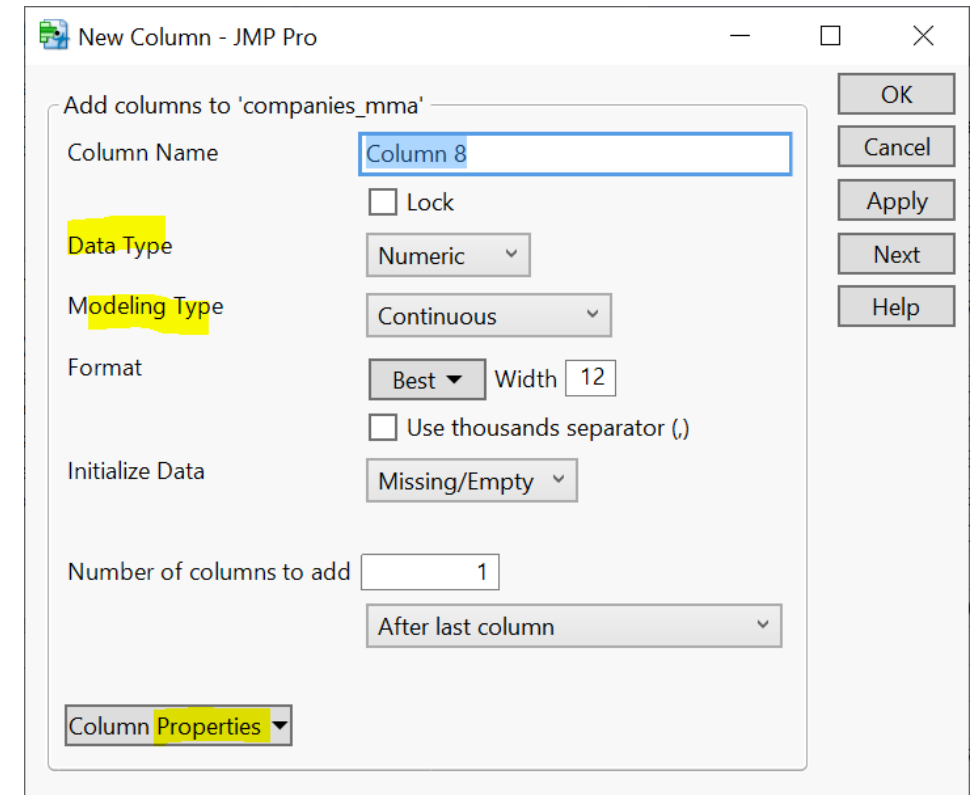
The image shows two overlapping windows from the JMP Pro software. The top window is titled 'New Column - JMP Pro' and is used for creating a new column. The 'Column Name' field is set to 'size', the 'Data Type' is 'Character', and the 'Modeling Type' is 'Nominal'. The 'Initialize Data' is set to 'Missing/Empty'. The 'Number of columns to add' is 1, and the position is 'After last column'. The bottom window is titled 'Column 6 - JMP Pro' and shows the 'Column Properties' dialog for the newly created column. The 'Formula' tab is selected, and the formula editor contains the following conditional logic:

$$\text{If} \left(\begin{array}{l} \# \text{Employ} < 20000 \Rightarrow \text{"small"} \\ 20000 \leq \# \text{Employ} < 40000 \Rightarrow \text{"medium"} \\ \text{else} \Rightarrow \text{"big"} \end{array} \right)$$

The 'Preview' section at the bottom of the dialog shows the resulting formula: `LessEqual Less`.

Review: Create a Column

- Data type
 - Numeric
 - Character
- Modelling type
 - Continuous
 - Ordinal (e.g., age: 1, 2, 3, ...; Monday, Tuesday, ...)
 - Nominal (e.g., male, female)
- Column Property
 - Formula



Review: Create a Column Shortcut (Demo)

The screenshot shows the JMP Pro interface with a data table named 'companies_mma'. The table has columns for 'Type', 'Sales (\$M)', 'Profits (\$M)', '# Employ', 'Assets', 'sales/emp', and 'size'. A context menu is open over the 'Sales (\$M)' column, and the 'New Formula Column' option is selected. The sub-menu for 'New Formula Column' is also visible, showing options like 'Transform', 'Combine', 'Aggregate', 'Distributional', 'Random', 'Row', and 'Group By'.

Row	Type	Sales (\$M)	Profits (\$M)	# Employ	Assets	sales/emp	size
1	Computer					0.1136647614	small
2	Pharmaceutical					0.1332429329	big
3	Computer					0.2626463415	small
4	Pharmaceutical					0.1327731423	big
5	Computer					0.437852171	small
6	Pharmaceutical					0.1741589649	big
7	Computer						
8	Computer						
9	Computer						
10	Computer						
11	Computer						
12	Pharmaceutical						
13	Computer						
14	Computer						
15	Pharmaceutical						
16	Pharmaceutical	969.2	227.4	3418	784	0.283557636	small
17	Pharmaceutical	6698.4	1495.4	34400	6756.7	0.1947209302	medium
18	Computer	5956	412	56000	4500	0.1063571429	big
19	Pharmaceutical	5902.7	681.1	42100	8224.8	0.1402204028	big

Review: Create a Column Shortcut

- Some useful transformations for time series manipulation

The screenshot shows the JMP Pro interface with a data table titled 'Monthly Sales'. The 'Sales' column is selected, and a context menu is open. The 'Row' option is highlighted in the submenu, and its options are also highlighted in yellow.

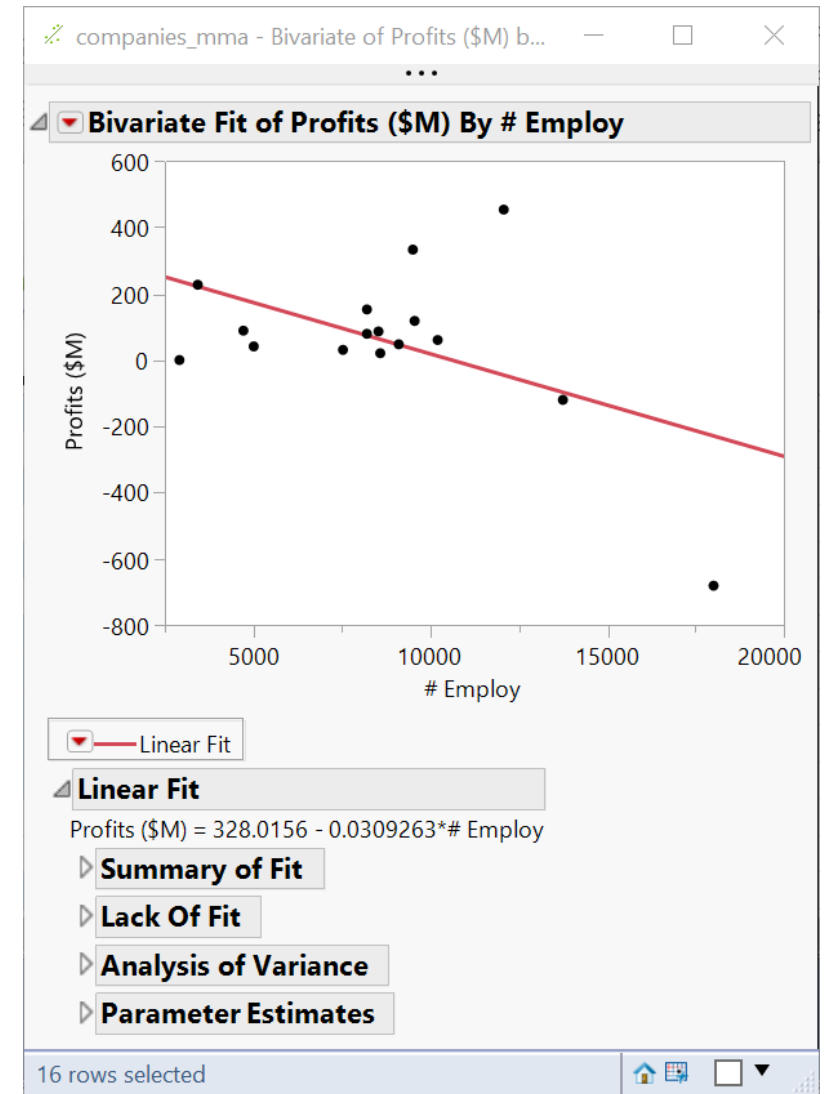
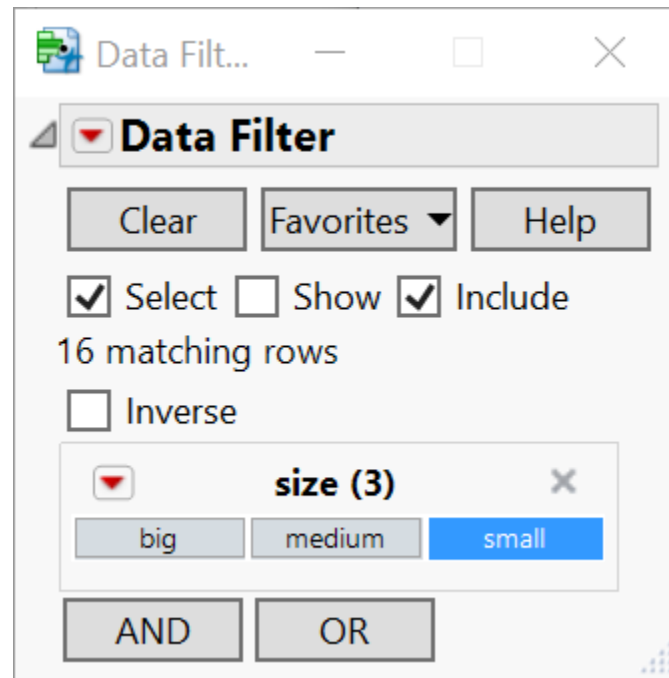
Row	Sales (\$1000)	Date
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19	170	03/1980
20	170	04/1980
21	158	05/1980
22	133	06/1980
23	114	07/1980
24	110	08/1980

Data Manipulation - Basics

- Cols
 - select or de-select columns
 - drop/delete columns
 - add new columns
- **Rows**
 - order/sort rows (see table operation)
 - **filter rows** (we have tried excluding certain rows)
- Tables
 - subset a table
 - sort a table
 - aggregate/summarize (by group)

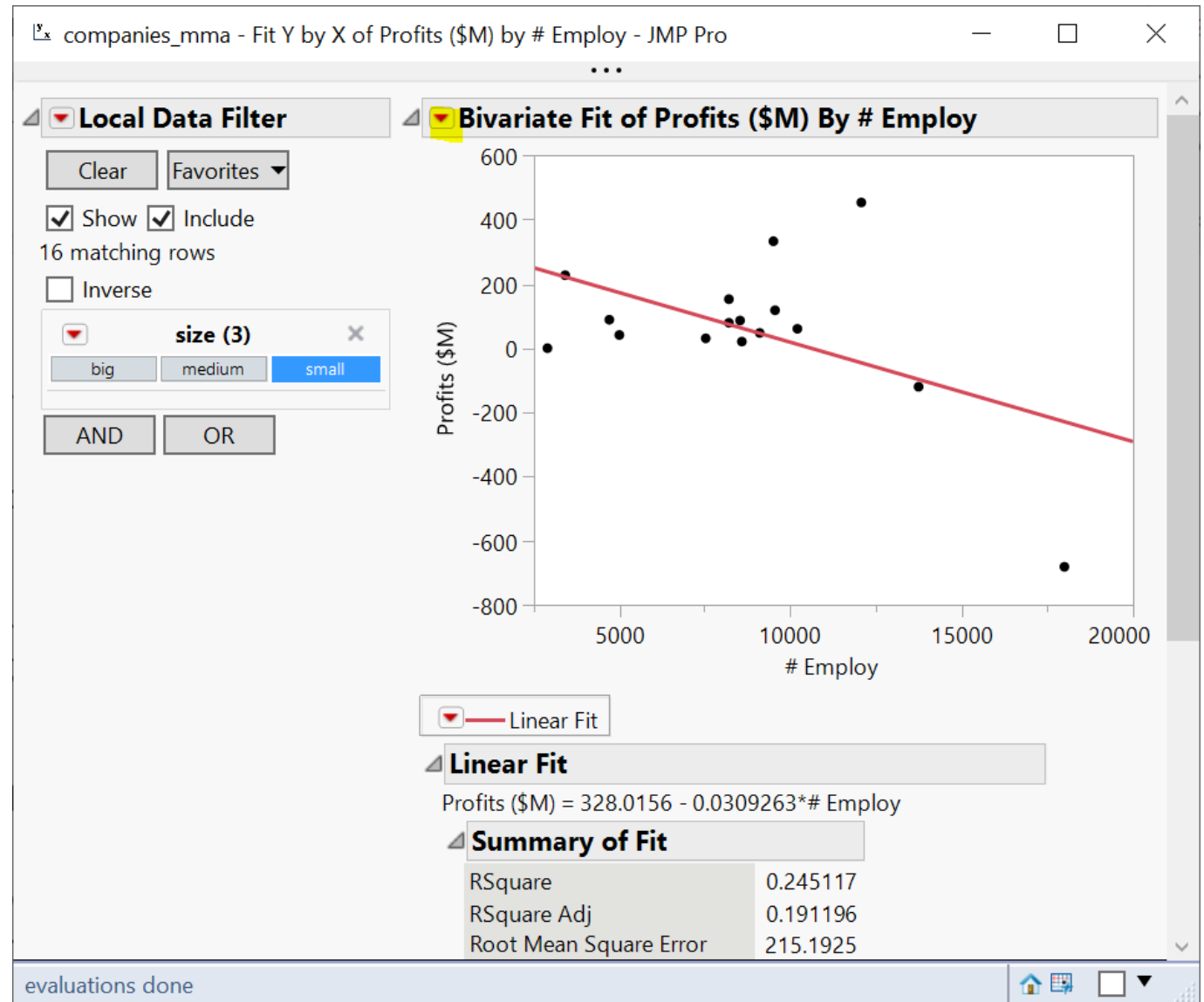
Filter Rows (Demo)

- Data Filter (global)
 - Affects all linked analysis report
- Rows > Data Filter
 - filter on the **size** col



Filter Rows (Demo)

- Local Data Filter
 - only affects the report where the filter is enabled

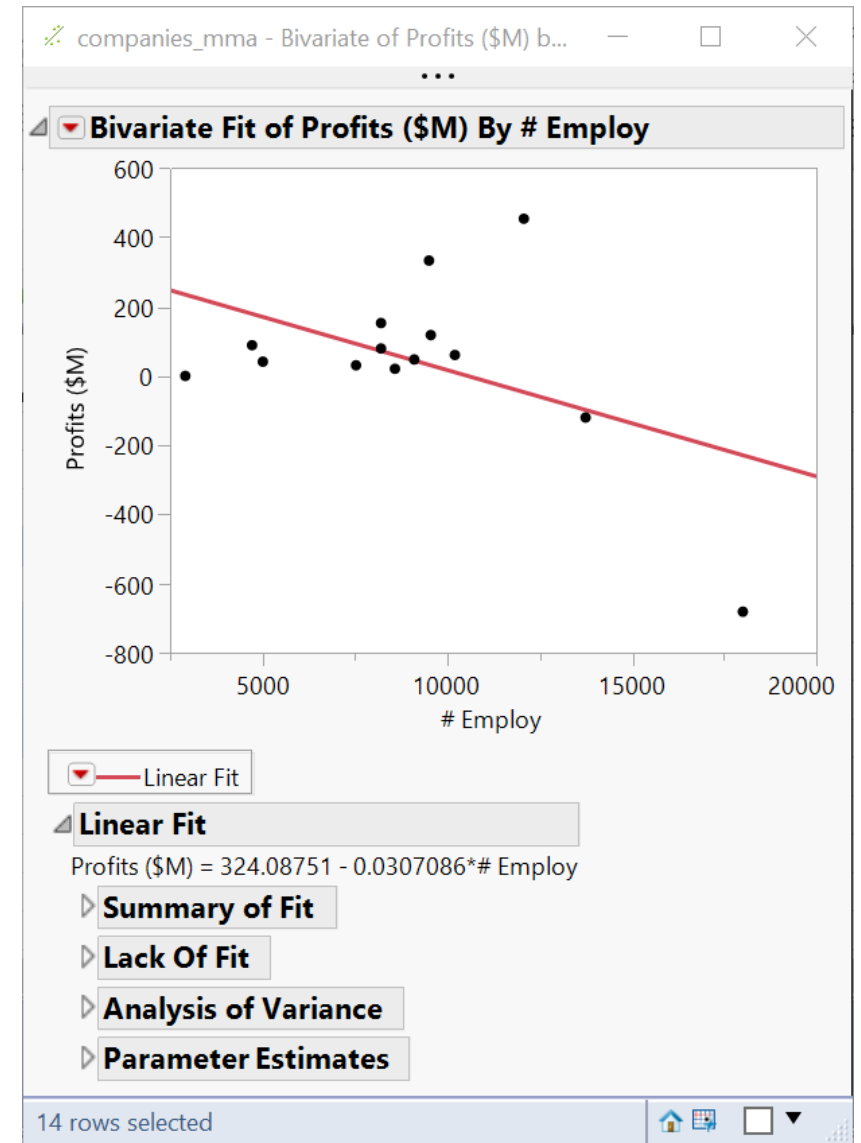


Your Turn (Hands-on)

- Create a data filter based on size & Type
 - either global or local
- Explore the filter in a linear regression analysis
- Save the filter script
- Explore adding a continuous col into the filter

Data Filter dialog box showing filter criteria:

- Data Filter**
- Clear Favorites Help
- Select Show Include
- 14 matching rows
- Inverse
- size (3)**: big, medium, **small**
- Type (2)**: **Computer**, Pharmaceutical
- AND OR
- evaluations done



Filter Rows (Demo)

- Rows > Row Selection > Select Where...

The screenshot shows the JMP Pro interface with the 'Rows' menu open. The 'Select Where...' option is highlighted in the menu. The background data table is as follows:

	sales	profits	employ	assets	size
1	-680.4	18000	1860.7	0.1640055556	small
2	89	4708	955.8	0.1666737468	small
3	-119.7	13740	1040.2	0.0963828239	small
4	939.5	28200	5848	0.148070922	medium
5	829	95000	10075	0.1252526316	big
6	79.5	8200	808	0.1065365854	small
7	1082	83100	7919	0.1184596871	big
8	227.4	3418	784	0.283557636	small
9	495.4	34400	6756.7	0.1947209302	medium
10	412	56000	4500	0.1063571429	big

Data Manipulation - Basics

- Cols
 - select columns
 - add new columns
- Rows
 - order/sort rows (see table operation)
 - filter rows (have tried excluding certain rows)
- **Tables**
 - subset a table
 - sort a table
 - aggregate/summarize (by group)

Subset a table (demo)

The screenshot shows the JMP Pro interface with the 'Tables' menu open and the 'Subset' dialog box displayed. The main window shows a data table with columns: Sales (\$M), Profits (\$M), # Employ, and Assets. The 'Subset' dialog box is configured to create a new data table from the selected rows and columns of the source data table. The 'Rows' section is set to 'All rows' with a sampling rate of 0.5 and a sample size of 16. The 'Columns' section is set to 'All columns' with 'Keep by columns' checked. The 'Output table name' is 'Subset of companies_mma'. The 'Action' buttons are 'OK', 'Cancel', 'Recall', and 'Help'. The 'Save Default Options' button is also visible.

companies_mma - JMP Pro

File Edit **Tables** Rows Cols DOE Analyze Graph Tools View Window Help

Summary

Subset

Sort

Stack

Split

Transpose

Join

Update

Concatenate

JMP Query Builder

Missing Data Pattern

Compare Data Tables

Anonymize

	Sales (\$M)	Profits (\$M)	# Employ	Assets		
855.1	31	7523	615.2			
utical	5453.5	859.8	40929	4851.6		
2153.7	153	8200	2233.7			
utical	6747	1102.2	50816	5681.5		
5284	454	12068	2743.9			
utical	9422	747	54100	8497		
2876.1	333.3	9500	2090.4			
709.3	41.4	5000	468.1			
2952.1	-680.4	18000	1860.7			
784.7	89	4708	955.8			
1324.3	-119.7	13740	1040.2			
utical	4175.6	939.5	28200	5848		
11899	829	95000	10075			
873.6	79.5	8200	808			
32	15	Pharmaceutical	9844	1082	83100	7919
0	16	Pharmaceutical	969.2	227.4	3418	784
1	17	Pharmaceutical	6698.4	1495.4	34400	6756.7
0	18	Computer	5956	412	56000	4500
0	19	Pharmaceutical	5903.7	681.1	42100	8324.8

evaluations done

Subset - JMP Pro

Creates a new data table from the selected rows and columns of the source data table, or within each group generated with the 'by' columns.

Subset by

Rows

All rows

Selected Rows

Random - sampling rate :

Random - sample size :

Stratify

Columns

All columns Selected columns

Keep by columns

Output table name:

Link to original data table

Copy formula

Suppress formula evaluation

Keep dialog open

Save Script to Source Table

Action

Sort Table / Order Rows (demo)

- Order rows by
 - a single column
 - multiple columns

The screenshot displays the JMP Pro interface with the 'Sort' menu open. The 'Sort' option is highlighted, and a tooltip indicates 'Sort rows by specified columns.' The background shows a data table with columns: Type, Sales (\$M), Profits (\$M), # Employ, Assets, sales/emp, and size. The 'Sort - JMP Pro' dialog box is open, showing the following configuration:

- Select Columns:** 7 Columns (Type, Sales (\$M), Profits (\$M), # Employ, Assets, sales/emp, size)
- Action:** By (size), Remove (Sales (\$M) optional)
- Copy formula
- Suppress formula evaluation
- Replace table
- Keep dialog open
- Save Script to Source Table

The dialog box also includes buttons for OK, Cancel, Recall, Help, and a 'Save Default Options' button. The 'Output table name:' field is empty.

Your Turn (Hands-on)

- What's the maximum Sales (\$M) a “small” firm makes?

Aggregate / Summarize (by Group) (Demo)

- Tables > Summary
- Find average profit by Type

companies_mma - JMP Pro

File Edit **Tables** Rows Cols DOE Analyze Graph

Summary

Request Summary Statistics by Grouping Columns.

Select Columns

7 Columns

- Type
- Sales (\$M)
- Profits (\$M)
- # Employ
- Assets
- sales/emp
- size

Include marginal statistics

For quantile statistics, enter value (%)

25

statistics column name format

stat(column)

Output table name:

Link to original data table

Prompt to save when closing summary tables

Keep dialog open

Save Script to Source Table

Statistics Mean(Profits (\$M)) optional

Group Type optional

Subgroup optional

Freq optional

Weight optional

Action

OK

Cancel

Remove

Recall

Help

Rows	Columns	Source
All rows	32	15 Pharmaceutical
Selected	0	16 Pharmaceutical
Excluded	1	17 Pharmaceutical
Hidden	0	18 Computer
Labelled	0	19

evaluations done

Your Turn (Hands-on)

- Find total sales by Type and Size

The screenshot displays the JMP Pro interface. The main window, titled "companies_mma By (Type, size) - JMP Pro", shows a data table with the following columns: Type, size, N Rows, and Sum(Sales (\$M)). The data is grouped by Type and size, with 6 rows of data.

	Type	size	N Rows	Sum(Sales (\$M))
1	Computer	big	3	18951.9
2	Computer	medium	2	6037.7
3	Computer	small	14	24612.8
4	Pharmaceutical	big	5	37370.2
5	Pharmaceutical	medium	5	21305.3
6	Pharmaceutical	small	2	2167.5

The "Summary - JMP Pro" dialog box is open, showing the "Request Summary Statistics by Grouping Columns" window. The "Select Columns" list includes 7 columns: Type, Sales (\$M), Profits (\$M), # Employ, Assets, sales/emp, and size. The "Statistics" dropdown is set to "Sum(Sales (\$M))". The "Group" dropdown is set to "Type" and "size". The "Subgroup" dropdown is set to "optional". The "Freq" and "Weight" dropdowns are also set to "optional". The "Output table name" field is empty. The "Link to original data table" checkbox is checked.

Aggregate / Summarize (by Group) (Demo)

- Analyze > Tabulate
- Tabulate (red triangle) > Make into data table

The screenshot shows the JMP Pro interface with the 'Analyze' menu open and 'Tabulate' selected. The 'Tabulate' dialog box is open, showing a list of columns and statistics. A preview table shows the resulting aggregated data.

Type	size	Sum
Computer	big	18951.9
	medium	6037.7
	small	24612.8
Pharmaceutical	big	37370.2
	medium	21305.3
	small	2167.5

1 row has been excluded.