# Package 'stuart' 

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## $R$ topics documented:

stuart-package ..... 2
bruteforce ..... 3
combinations ..... 6
crossvalidate ..... 8
fairplayer ..... 9
gene ..... 10
heuristics ..... 16
holdout ..... 18
mmas ..... 19
randomsamples ..... 25
sups ..... 29
Index ..... 30
stuart-package STUART: Subtests Using Algorithmic Rummaging Techniques

## Description

The STUART-Package automates the generation of subtests from a given set of items within the confines of confirmatory factor analysis.

## Functionality

Using this package subtests can be generated in four different ways: using a pseudo-random approach rooted in Ant-Colony-Optimization via the mmas-function, using a simple genetic algorithm via the gene-function, using a brute-force approach via the aptly named bruteforce-function, or by random chance, using the randomsamples-function.

Addtionally, there are some convenience functions which are more or less useful. The combinationsfunction can be used to determine the number of possible subtests to inform a decision on which selection approach to use. The crossvalidate-function can be used to evaluate the quality of a selection in a different (sub-)sample. To add to this functionality, the holdout-function randomly splits the data into a calibration and a validation sample. The heuristics-function can be used to extract the formatting of heuristic matrices which can be provided to the mmas-function.

The package also provides two datasets: the sups dataset and the fairplayer dataset.

## Author(s)

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## Description

Construct subtests from a given pool of items using a brute-force approach (i.e. by estimating all possible combinations).

## Usage

```
    bruteforce(
        data,
        factor.structure,
        capacity = NULL,
        item.invariance = "congeneric",
        repeated.measures = NULL,
        long.invariance = "strict",
        mtmm = NULL,
        mtmm.invariance = "configural",
        grouping = NULL,
        group.invariance = "strict",
        comparisons = NULL,
        auxiliary = NULL,
        use.order = FALSE,
        software = "lavaan",
        cores = NULL,
        objective = NULL,
        ignore.errors = FALSE,
        analysis.options = NULL,
        suppress.model = FALSE,
        request.override = 10000,
        filename = NULL
    )
```


## Arguments

data A data.frame containing all relevant data.
factor.structure
A list linking factors to items. The names of the list elements correspond to the factor names. Each list element must contain a character-vector of item names that are indicators of this factor.
capacity A list containing the number of items per subtest. This must be in the same order as the factor. structure provided. If a single number, it is applied to all subtests. If NULL all items are evenly distributed among the subtests.
item.invariance
A character vector of length 1 or the same length as factor . structure containing the desired invariance levels between items pertaining to the same subtest.

Currently there are five options: 'congeneric', 'ess.equivalent', 'ess.parallel', 'equivalent', and 'parallel', the first being the default.
repeated.measures
A list linking factors that are repeated measures of each other. Repeated factors must be in one element of the list - other sets of factors in other elements of the list. When this is NULL (the default) a cross-sectional model is estimated.
long. invariance
A character vector of length 1 or the same length as repeated.measures containing the longitudinal invariance level of repeated items. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When repeated.measures=NULL this argument is ignored.
$\mathrm{mtmm} \quad$ A list linking factors that are measurements of the same construct with different methods. Measurements of the same construct must be in one element of the list - other sets of methods in other elements of the list. When this is NULL (the default) a single method model is estimated.
mtmm.invariance
A character vector of length 1 or the same length as mtmm containing the invariance level of MTMM items. Currently there are five options: 'none', 'configural', 'weak', 'strong', and 'strict'. Defaults to 'configural'. With 'none' differing items are allowed for different methods. When mtmm=NULL this argument is ignored.
grouping The name of the grouping variable. The grouping variable must be part of data provided and must be a numeric variable.
group.invariance
A single value describing the assumed invariance of items across groups. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When grouping=NULL this argument is ignored.
comparisons A character vector containing any combination of 'item', 'long', 'mtmm', and 'group' indicating which invariance should be assessed via model comparisons. The order of the vector dictates the sequence in which model comparisons are performed. Defaults to NULL meaning that no model comparisons are performed.
auxiliary The names of auxiliary variables in data. These can be used in additional modeling steps that may be provided in analysis.options\$model.
use.order A logical indicating whether or not to take the selection order of the items into account. Defaults to FALSE.
software The name of the estimation software. Can currently be 'lavaan' (the default), 'Mplus', or 'Mplus Demo'. Each option requires the software to be installed.
cores The number of cores to be used in parallel processing. If NULL (the default) the result of detectCores will be used. On Unix-y machines parallel processing is implemented via mclapply, on Windows machines it is realized via parLapply.
objective A function that converts the results of model estimation into a pheromone. See mmas for details.
ignore.errors A logical indicating whether or not to ignore estimation problems (such as non positive-definite latent covariance matrices). Defaults to FALSE.
analysis.options
A list additional arguments to be passed to the estimation software. The names of list elements must correspond to the arguments changed in the respective estimation software. E.g. analysis.options\$model can contain additional modeling commands - such as regressions on auxiliary variables.
suppress.model A logical indicating whether to suppress the default model generation. If TRUE a model must be provided in analysis.options\$model.
request.override
The maximum number of combinations for which the estimation is performed immediately, without an additional override request.
filename The stem of the filenames used to save inputs, outputs, and data files when software='Mplus'. This may include the file path. When NULL (the default) files will be saved to the temporary directory, which is deleted when the R session is ended.

## Details

The pheromone function provided via objective is used to assess the quality of the solutions. These functions can contain any combination of the fit indices provided by the estimation software. When using Mplus these fit indices are 'rmsea', 'srmr', 'cfi', 'tli', 'chisq' (with 'df' and 'pvalue'), 'aic', 'bic', and 'abic'. With lavaan any fit index provided by inspect can be used. Additionally 'crel' provides an aggregate of composite reliabilites, 'rel' provides a vector or a list of reliability coefficients for the latent variables, 'con' provides an aggregate consistency estimate for MTMM analyses, and 'lvcor' provides a list of the latent variable correlation matrices. For more detailed objective functions 'lambda', 'theta', 'psi', 'alpha', and 'nu' provide the model-implied matrices. Per default a pheromone function using 'crel', 'rmsea', and 'srmr' is used. Please be aware that the objective must be a function with the required fit indices as (correctly named) arguments.

Using model comparisons via the comparisons argument compares the target model to a model with one less degree of assumed invariance (e.g. if your target model contains strong invariance, the comparison model contain weak invariance). Adding comparisons will change the preset for the objective function to include model differences. With comparisons, a custom objective function (the recommended approach) can also include all model fit indices with a preceding delta. to indicate the difference in this index between the two models. If more than one type of comparison is used, the argument of the objective function should end in the type of comparison requested (e.g. delta.cfi.group to use the difference in CFI between the model comparison of invariance across groups).

## Value

Returns an object of the class stuartOutput for which specific summary and plot methods are available. The results are a list.

```
call The called function.
software The software used to fit the CFA models.
parameters A list of the ACO parameters used.
analysis.options
```

A list of the additional arguments passed to the estimation software.

| timer | An object of the class proc_time which contains the time used for the analysis. |
| :--- | :--- |
| log | A data.frame containing the estimation history. |
| solution | NULL |
| pheromones | NULL |
| subtests | A list containing the names of the selected items and their respective subtests. |
| final | The results of the estimation of the global-best solution. |

## Author(s)

Martin Schultze

## See Also

mmas, gene, randomsamples, combinations

## Examples

```
# Bruteforce selection in a minimal example
# selecting 3 of 5 items
# requires lavaan
data(fairplayer)
fs <- list(ra = names(fairplayer)[53:57])
sel <- bruteforce(fairplayer, fs, 3,
    cores = 1) # number of cores set to 1
summary(sel) # Fit is perfect because of just-identified model
```

```
combinations
Compute the number of possible subtest combinations
```


## Description

Used to compute the number of possible subtest constellations prior to performing item selection.

```
Usage
    combinations(
        data,
        factor.structure,
        capacity = NULL,
        repeated.measures = NULL,
        mtmm = NULL,
        use.order = FALSE,
    )
```


## Arguments

$$
\begin{aligned}
& \text { data A data.frame containing all relevant data. } \\
& \text { factor.structure } \\
& \text { A list linking factors to items. The names of the list elements correspond to the } \\
& \text { factor names. Each list element must contain a character-vector of item names } \\
& \text { that are indicators of this factor. } \\
& \text { A list containing the number of items per subtest. This must be in the same } \\
& \text { order as the factor. structure provided. If a single number, it is applied to all } \\
& \text { subtests. If NULL all items are evenly distributed among the subtests. }
\end{aligned}
$$

## Value

Returns the number of possible subtest constellations.

## Author(s)

Martin Schultze

## See Also

bruteforce, mmas, gene

## Examples

```
# Determine number of combinations in a simple situation
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
combinations(fairplayer, fs, 4)
# Number of combinations with repeated measures
data(fairplayer)
fs <- list(si1 = names(fairplayer)[83:92],
    si2 = names(fairplayer)[93:102],
    si3 = names(fairplayer)[103:112])
repe <- list(si = c('si1', 'si2', 'si3'))
combinations(fairplayer, fs, 4, repeated.measures = repe)
```


## Description

Cross-validate a measurement model obtained from STUART.

## Usage

crossvalidate(selection, old.data, new.data, filename = NULL)

## Arguments

selection An object of class stuartOutput.
old.data A data.frame of the calibration sample.
new. data A data. frame of the validation sample.
filename The stem of the filenames used to save inputs, outputs, and data files when software='Mplus'. This may include the file path. When NULL (the default) files will be saved to the temporary directory, which is deleted when the R session is ended.

## Value

Returns a list containing the data. frame comparison and an object containing the model results of the four different invariance assumptions.
comparison A data.frame with 4 observations, each observation representing a level of measurement invariance. The number of columns depends on the arguments of the objective used in the original selection. In addition to those columns, three additional columns with the (corrected) Likelihood-Ratio-Tests are reported.
models A list of the four model results either of class lavaan or mplus.model, depending on the software-setting of the original selection.

## Author(s)

Martin Schultze

## See Also

```
holdout, mmas, bruteforce
```


## Examples

```
# Split data into two halves
data(fairplayer)
half1 <- fairplayer[1:72,]
half2 <- fairplayer[73:143,]
# Simple example from bruteforce
fs <- list(ra = names(fairplayer)[53:57])
sel <- bruteforce(half1, fs, 3,
    cores = 1) # number of cores set to 1
# Validation
crossvalidate(sel, half1, half2)
# Using the 'holdout' function for data split
data(fairplayer)
split <- holdout(fairplayer, seed = 55635)
# Simple example from bruteforce
fs <- list(ra = names(fairplayer)[53:57])
sel <- bruteforce(split, fs, 3,
    cores = 1) # number of cores set to 1
# Validation
crossvalidate(sel, split)
```

fairplayer MTMM fairplayer Intervention Data (2009)

## Description

Self- and teacher-reported empathy (8 item scale), relational aggression (5 item scale), and social intelligence ( 10 item scale) at three different occasions.

## Format

A data frame with 143 observations on 142 variables. The variable names consist of an initial letter indicating the source ( $s$ : self-report, $t$ : teacher-report), two letters indicating the construct (EM: empathy, RA: relational aggression, SI: social intelligence), a number indicating the item number on the scale, and a " t " followed by a number indicating the measurement occasion.

## Source

Bull, H., Schultze, M., Scheithauer, H. (2009) School-based prevention of bullying and relational aggression: The fairplayer.manual. European Journal of Developmental Science, 3:313-317.
Schultze, M. (2012). Evaluating What The Crowd Says. A longitudinal structural equation model for exchangeable and structurally different methods for evaluating interventions. Unpublished Diploma Thesis.

## Description

Construct subtests from a given pool of items using a simple genetic algorithm. Allows for multiple constructs, occasions, and groups.

## Usage

```
gene(
        data,
        factor.structure,
        capacity = NULL,
        item.weights = NULL,
        item.invariance = "congeneric",
    repeated.measures = NULL,
    long.invariance = "strict",
    mtmm = NULL,
    mtmm.invariance = "configural",
    grouping = NULL,
    group.invariance = "strict",
    comparisons = NULL,
    auxiliary = NULL,
    use.order = FALSE,
    software = "lavaan",
    cores = NULL,
    objective = NULL,
    ignore.errors = FALSE,
    generations = 256,
    individuals = 64,
    selection = "tournament",
    selection.pressure = NULL,
    elitism = NULL,
    reproduction = 0.5,
    mutation = 0.05,
    mating.index = 0,
    mating.size = 0.25,
    mating.criterion = "similarity",
    immigration = 0,
    convergence.criterion = "geno.between",
    tolerance = NULL,
    reinit.n = 1,
    reinit.criterion = convergence.criterion,
    reinit.tolerance = NULL,
    reinit.prop = 0.75,
    schedule = "run",
```

```
    analysis.options = NULL,
    suppress.model = FALSE,
    seed = NULL,
    filename = NULL
)
```


## Arguments

data A data.frame containing all relevant data.
factor.structure

A list linking factors to items. The names of the list elements correspond to the factor names. Each list element must contain a character-vector of item names that are indicators of this factor.
capacity A list containing the number of items per subtest. This must be in the same order as the factor. structure provided. If a single number, it is applied to all subtests. If NULL all items are evenly distributed among the subtests.
item.weights A placeholder. Currently all weights are assumed to be one.
item.invariance
A character vector of length 1 or the same length as factor. structure containing the desired invariance levels between items pertaining to the same subtest. Currently there are five options: 'congeneric', 'ess.equivalent', 'ess.parallel', 'equivalent', and 'parallel', the first being the default.
repeated.measures
A list linking factors that are repeated measures of each other. Repeated factors must be in one element of the list - other sets of factors in other elements of the list. When this is NULL (the default) a cross-sectional model is estimated.
long.invariance
A character vector of length 1 or the same length as repeated.measures containing the longitudinal invariance level of repeated items. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When repeated.measures=NULL this argument is ignored.
$\mathrm{mtmm} \quad$ A list linking factors that are measurements of the same construct with different methods. Measurements of the same construct must be in one element of the list - other sets of methods in other elements of the list. When this is NULL (the default) a single method model is estimated.
mtmm.invariance
A character vector of length 1 or the same length as mtmm containing the invariance level of MTMM items. Currently there are five options: 'none', 'configural', 'weak', 'strong', and 'strict'. Defaults to 'configural'. With 'none' differing items are allowed for different methods. When mtmm=NULL this argument is ignored.
grouping The name of the grouping variable. The grouping variable must be part of data provided and must be a numeric variable.
group.invariance
A single value describing the assumed invariance of items across groups. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When grouping=NULL this argument is ignored.

| comparisons | A character vector containing any combination of 'item', 'long', 'mtmm', and 'group' indicating which invariance should be assessed via model comparisons. The order of the vector dictates the sequence in which model comparisons are performed. Defaults to NULL meaning that no model comparisons are performed. |
| :---: | :---: |
| auxiliary | The names of auxiliary variables in data. These can be used in additional modeling steps that may be provided in analysis.options\$model. |
| use.order | A logical indicating whether or not to take the selection order of the items into account. Defaults to FALSE. |
| software | The name of the estimation software. Can currently be 'lavaan' (the default) or 'Mplus'. Each option requires the software to be installed. |
| cores | The number of cores to be used in parallel processing. If NULL (the default) the result of detectCores will be used. On Unix-y machines parallel processing is implemented via mclapply, on Windows machines it is realized via parLapply. |
| objective | A function that converts the results of model estimation into a pheromone. See 'details' for... details. |
| ignore.errors | A logical indicating whether or not to ignore estimation problems (such as non positive-definite latent covariance matrices). Defaults to FALSE. |
| generations | Maximum number of generations to run. Defaults to 256. |
| individuals | The number of individuals per generation. Defaults to 64 . |
| selection | The method used for selecting possible parents. Can be either 'proportional' for fitness proportional random selection or 'tournament' (the default) for a semi-deterministic selection. |
| selection.pressure |  |
|  | The pressure exerted during the selection process, depending on the selection: if selection = 'proportional' the non-linearity coefficient of the pheromone when determining selection probability (the default is 1 ); if selection = 'proportional ' the number of randomly selected individuals from which to choose the best (the default is 5). |
| elitism | The proportion of individuals from the last generation to carry over to the next generation. Defaults to $1 /$ individuals, meaning that the best individual is retained into the next generation. |
| reproduction | The proportion of individuals that are allowed to sire offspring. These individuals are selected using fitness proportionate selection. Defaults to .5. |
| mutation | The mutation probability. Defaults to .05 . See 'details'. |
| mating.index | The relative rank of the selected mate within the mating pool. A number bewteen 0 (the default) and 1 . The meaning depends on the setting of mating. criterion. See 'details'. |
| mating.size | The proportion of potential mates sampled from the pool of reproducers for each selected individual. Defaults to .25 . See 'details'. |
| mating.criterion |  |
|  | The criterion by which to select mates. Can be either 'similarity' (the default) or 'fitness'. See 'details'. |
| immigration | The proportion of individuals per generation that are randomly generated immigrants. Defaults to 0 . |

convergence.criterion
The criterion by which convergence is determined. Can be one of four criteria 'variance', 'median', 'geno.within', and 'geno.between' (the default). See 'details'.
tolerance The tolerance for determining convergence. The default depends on the setting used for convergence.criterion. See 'details'.
reinit.n The maximum number of reinitilizations to be performed. Defaults to 0 . See 'details'.
reinit.criterion
The convergence criterion used to determine whether the population should be reinitialized. Can be one of four criteria 'variance', 'median', 'geno.within', and 'geno.between'. Per default, the same criterion provided to convergence.criterion is used. See 'details'.
reinit.tolerance
The tolerance for determining the necessity of reinitialization. The default depends on the setting used for convergence. criterion. See 'details'.
reinit.prop The proportion of the population to be discarded and replaced by random individuals when reinitializing. Defaults to .75 . See 'details'.
schedule The counter which the scheduling of parameters pertains to. Can be either 'run' (the default), for a continuous schedule, 'generation', for a schedule that is restarted every time the population is reinitialized.
analysis.options
A list additional arguments to be passed to the estimation software. The names of list elements must correspond to the arguments changed in the respective estimation software. E.g. analysis.options\$model can contain additional modeling commands - such as regressions on auxiliary variables.
suppress.model A logical indicating whether to suppress the default model generation. If TRUE a model must be provided in analysis.options $\$$ model.
seed A random seed for the generation of random samples. See Random for more details.
filename The stem of the filenames used to save inputs, outputs, and data files when software='Mplus'. This may include the file path. When NULL (the default) files will be saved to the temporary directory, which is deleted when the R session is ended.

## Details

The pheromone function provided via objective is used to assess the quality of the solutions. These functions can contain any combination of the fit indices provided by the estimation software. When using Mplus these fit indices are 'rmsea', 'srmr', 'cfi', 'tli', 'chisq' (with 'df' and 'pvalue'), 'aic', 'bic', and 'abic'. With lavaan any fit index provided by inspect can be used. Additionally 'crel' provides an aggregate of composite reliabilites, 'rel' provides a vector or a list of reliability coefficients for the latent variables, 'con' provides an aggregate consistency estimate for MTMM analyses, and 'lvcor' provides a list of the latent variable correlation matrices. For more detailed objective functions 'lambda', 'theta', 'psi', and 'alpha' provide the model-implied matrices. Per default a pheromone function using 'crel', 'rmsea', and 'srmr' is used. Please be aware that the objective must be a function with the required fit indices as (correctly named) arguments.

Using model comparisons via the comparisons argument compares the target model to a model with one less degree of assumed invariance (e.g. if your target model contains strong invariance, the comparison model contain weak invariance). Adding comparisons will change the preset for the objective function to include model differences. With comparisons, a custom objective function (the recommended approach) can also include all model fit indices with a preceding delta. to indicate the difference in this index between the two models. If more than one type of comparison is used, the argument of the objective function should end in the type of comparison requested (e.g. delta.cfi.group to use the difference in CFI between the model comparison of invariance across groups).

The genetic algorithm implemented selects parents in a two-step procedure. First, either a tournament or a fitness proportionate selection is performed to select inviduals times reproduction viable parents. Then, the non-self-adaptive version of mating proposed by Galán, Mengshoel, and Pinter (2013) is used to perform mating. In contrast to the original article, the mating. index and mating. size are handled as proportions, not integers. Similarity-based mating is based on the Jaccard Similarity. Mutation is currently always handled as an exchange of the selection state between two items. This results in mutation selecting one item that was not selected prior to mutation and dropping one item selected prior to mutation.
Per default (convergence.criterion = 'geno.between'), convergence is checked by tracking the changes between selection probabilities over three subsequent generations. If the difference between these selections probabilities falls below tolerance ( .01 by default) in three consecutive generations, the algorithm is deemed to have converged. To avoid false convergence in the early search, the lower of either $10 \%$ of the generations or 10 generations must be completed, before convergence is checked. When using reinitialization the default for reinit. tolerance is .05 to initiate a full reinitialization of the population. An alternative convergence criterion is the variance of the global-best values on the objective function, as proposed by Bhandari, Murthy, and Pal (2012). For generalizability over different functions provided to objective, variances are scaled to the first global-best found. In this case the setting for tolerance pertains to the pure variance estimate and defaults to .0005 (or .005 when regarding the reinitialization process discussed below). Alternatively, the setting 'median' checks for the relative difference between the objective function value of the generation-best and the median value of a generation (scaled by the former). Here, the default is .05 (or .10 when regarding the reinitialization process). The setting 'geno.within' checks for the variability of genotypes in a generation, by determining the relative frequency, with which each item is selected. Convergence is reached if this relative frequency is either tolerance (.8, by default - or .7 for the reinitialization process) or 1 - tolerance for all items within a generation.

A reinitialization procedure can be used to avoid premature convergence. The behavior is controlled via the arguments starting in reinit. The argument reinit.n determines the maximum number of possible reinitializations. After each reinitialization, the generation counter is reset, allowing for the maximum number of generations before the search is aborted. The reinit.criterion and reinit. tolerance relate to convergence criteria outlined above. It is recommended to use a higher tolerance on reinitialization than on final convergence to avoid long periods of stagnant search. The reinit.prop determines the proportion of the population to be replaced by random individuals when reinitializing. Note that even when reinit. prop $=1$, the number of individuals kept due to elitism is not discarded.

## Value

Returns an object of the class stuartOutput for which specific summary and plot methods are available. The results are a list.

| call | The called function. |
| :--- | :--- |
| software | The software used to fit the CFA models. |
| parameters | A list of the parameters used. |
| analysis.options |  |

A list of the additional arguments passed to the estimation software.
timer An object of the class proc_time which contains the time used for the analysis.
log A data. frame containing the optimization history.
solution A list of matrices with the choices made in the global-best solution.
pheromones A list of matrices with the relative selection frequency of items in the final generation.
subtests A list containing the names of the selected items and their respective subtests.
final The results of the estimation of the global-best solution.

## Author(s)

Martin Schultze

## References

Bhandari, D., Murthy, C.A., \& Pal, S.K. (2012). Variance as a Stopping Criterion for Genetic Algorithms with Elitist Model. Fundamenta Informaticae, 120, 145-164. doi:10.3233/FI-2012-754 Galán, S.F., Mengshoel, O.J., \& Pinter, R. (2013). A novel mating approach for genetic algorithms. Evolutionary Computation, 21(2), 197-229. doi:10.1162/EVCO_a_00067

## See Also

bruteforce, mmas, randomsamples

## Examples

```
# Genetic selection in a simple situation
# requires lavaan
# number of cores set to 1 in all examples
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
# minimal example
sel <- gene(fairplayer, fs, 4,
    generations = 1, individuals = 10, # minimal runtime, remove for application
    seed = 55635, cores = 1)
summary(sel)
# longitudinal example
data(fairplayer)
fs <- list(si1 = names(fairplayer)[83:92],
    si2 = names(fairplayer)[93:102],
```

```
        si3 = names(fairplayer)[103:112])
    repe <- list(si = c('si1', 'si2', 'si3'))
    # run to convergence
    # switching to best-last mating and 50\% mating size
    sel <- gene(fairplayer, fs, 4,
        repeated.measures = repe, long.invariance = 'strong',
        mating.criterion = 'fitness', mating.index = 0,
        mating.size = .5,
    seed = 55635, cores = 1)
# forcing a run through all generations
# by disabling the convergence rule
sel <- gene(fairplayer, fs, 4,
    repeated.measures = repe, long.invariance = 'strong',
    tolerance = 0, seed = 55635,
    cores = 1)
```


## Description

Creates uninformative heuristic matrices for the use in mmas.

## Usage

```
heuristics(
    data,
    factor.structure,
    capacity = NULL,
    repeated.measures = NULL,
    mtmm = NULL,
    grouping = NULL,
    localization = "nodes",
)
```


## Arguments

data A data.frame containing all relevant data.
factor.structure
A list linking factors to items. The names of the list elements correspond to the factor names. Each list element must contain a character-vector of item names that are indicators of this factor.

| capacity | A list containing the number of items per subtest. This must be in the same <br> order as the factor. structure provided. If a single number, it is applied to all <br> subtests. If NULL all items are evenly distributed among the subtests. |
| :--- | :--- |
| repeated.measures |  |
| A list linking factors that are repeated measures of each other. Repeated factors |  |
| must be in one element of the list - other sets of factors in other elements of the |  |
| list. When this is NULL (the default) a cross-sectional model is estimated. |  |

## Details

This function generates a list of matrices which can be used as heuristics for all STUART constructions. This is mainly intended to write the structure of the heuristic matrices to an object, change components in line with theoretically derived heuristics and feed them back into mmas via the heuristics argument. The generated heuristics will contain only 1 s and 0 s , making it no heuristic information. Selection probabilities can be altered by manipulating the contents of the object created by heuristics. Setting a value to 0 will result in prohibiting a certain choice to be made. Please note, that it will lead to unpredictable behavior if the diagonal elements of the matrices produced in the arcs parameterization are set to values other than 0 .

## Value

Returns a list of the same length as the factor. structure argument provided.

## Author(s)

Martin Schultze

## See Also

## mmas

## Examples

```
# heuristics for node localization
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
(heu <- heuristics(fairplayer, fs, 4))
```

```
# Define anchor-item
heu$si[1] <- }1000
heu
# heuristics for arc localization
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
(heu <- heuristics(fairplayer, fs, 4, localization = 'arcs'))
# Define equal selection of odd and even items
heu$si[1:10,] <- c(rep(c(0, 1), 5), rep(c(1, 0), 5))
heu
```

    holdout Data selection for holdout validation.
    
## Description

Split a data. frame into two subsets for holdout validation.

## Usage

holdout(data, prop $=0.5$, grouping $=$ NULL, seed $=$ NULL)

## Arguments

data A data.frame.
prop A single value or vector of proportions of data in calibration sample. Defaults to .5 , for an even split.
grouping Name of the grouping variable. Providing a grouping variable ensures that the provided proportion is selected within each group.
seed A random seed. See Random for more details.

## Value

Returns a list containing two data.frames, called calibrate and validate. The first corresponds to the calibration sample, the second to the validation sample.

## Author(s)

Martin Schultze

## See Also

crossvalidate

## Examples

```
# seeded selection, 25% validation sample
data(fairplayer)
split <- holdout(fairplayer, .75, seed = 55635)
lapply(split, nrow) # check size of samples
```

    mmas Subtest construction using the Max-Min-Ant-System
    
## Description

Construct subtests from a given pool of items using the classical Max-Min Ant-System (Stützle, 1998). Allows for multiple constructs, occasions, and groups.

## Usage

```
mmas(
    data,
    factor.structure,
    capacity = NULL,
    item.weights = NULL,
    item.invariance = "congeneric",
    repeated.measures = NULL,
    long.invariance = "strict",
    mtmm = NULL,
    mtmm.invariance = "configural",
    grouping = NULL,
    group.invariance = "strict",
    comparisons = NULL,
    auxiliary = NULL,
    use.order = FALSE,
    software = "lavaan",
    cores = NULL,
    objective = NULL,
    ignore.errors = FALSE,
    ants = 16,
    colonies = 256,
    evaporation = 0.95,
    alpha = 1,
    beta = 1,
    pheromones = NULL,
    heuristics = NULL,
    deposit = "ib",
    localization = "nodes",
    pbest = 0.005,
```

```
    tolerance = 0.5,
    schedule = "run",
    analysis.options = NULL,
    suppress.model = FALSE,
    seed = NULL,
    filename = NULL
)
```


## Arguments

data A data.frame containing all relevant data.
factor.structure

A list linking factors to items. The names of the list elements correspond to the factor names. Each list element must contain a character-vector of item names that are indicators of this factor.
capacity A list containing the number of items per subtest. This must be in the same order as the factor. structure provided. If a single number, it is applied to all subtests. If NULL all items are evenly distributed among the subtests.
item.weights A placeholder. Currently all weights are assumed to be one.
item.invariance
A character vector of length 1 or the same length as factor. structure containing the desired invariance levels between items pertaining to the same subtest. Currently there are five options: 'congeneric', 'ess.equivalent', 'ess.parallel', 'equivalent', and 'parallel', the first being the default.
repeated.measures
A list linking factors that are repeated measures of each other. Repeated factors must be in one element of the list - other sets of factors in other elements of the list. When this is NULL (the default) a cross-sectional model is estimated.
long. invariance
A character vector of length 1 or the same length as repeated.measures containing the longitudinal invariance level of repeated items. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When repeated.measures=NULL this argument is ignored.
$\mathrm{mtmm} \quad$ A list linking factors that are measurements of the same construct with different methods. Measurements of the same construct must be in one element of the list - other sets of methods in other elements of the list. When this is NULL (the default) a single method model is estimated.
mtmm.invariance
A character vector of length 1 or the same length as mtmm containing the invariance level of MTMM items. Currently there are five options: 'none', 'configural', 'weak', 'strong', and 'strict'. Defaults to 'configural'. With 'none' differing items are allowed for different methods. When mtmm=NULL this argument is ignored.
grouping The name of the grouping variable. The grouping variable must be part of data provided and must be a numeric variable.
group.invariance
A single value describing the assumed invariance of items across groups. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When grouping=NULL this argument is ignored.
comparisons A character vector containing any combination of 'item', 'long', 'mtmm', and 'group' indicating which invariance should be assessed via model comparisons. The order of the vector dictates the sequence in which model comparisons are performed. Defaults to NULL meaning that no model comparisons are performed.
auxiliary The names of auxiliary variables in data. These can be used in additional modeling steps that may be provided in analysis.options\$model.
use.order A logical indicating whether or not to take the selection order of the items into account. Defaults to FALSE.
software The name of the estimation software. Can currently be 'lavaan' (the default) or 'Mplus'. Each option requires the software to be installed.
cores The number of cores to be used in parallel processing. If NULL (the default) the result of detectCores will be used. On Unix-y machines parallel processing is implemented via mclapply, on Windows machines it is realized via parLapply.
objective A function that converts the results of model estimation into a pheromone. See 'details' for... details.
ignore.errors A logical indicating whether or not to ignore estimation problems (such as non positive-definite latent covariance matrices). Defaults to FALSE.
ants The number of ants per colony to be estimated. Can either be a single value or an array with two columns for parameter scheduling. See 'details'.
colonies The maximum number of colonies estimated since finding the latest global-best solution before aborting the process. Can either be a single value or an array with two columns for parameter scheduling. See 'details'.
evaporation The evaporation coefficient. Can either be a single value or an array with two columns for parameter scheduling. See 'details'.
alpha The nonlinearity coefficient of the pheromone-trail's contribution to determining selection probabilities. Defaults to 1 (linear). Can either be a single value or an array with two columns for parameter scheduling. See 'details'.
beta The nonlinearity coefficient of the heuristics' contribution to determining selection probabilities. Defaults to 1 (linear). Can either be a single value or an array with two columns for parameter scheduling. See 'details'.
pheromones A list of pheromones as created by mmas. This can be used to continue previous runs of this function.
heuristics An object of the class stuartHeuristic as provided by heuristics which contains heuristic information to be used in determining selection probabilities. If NULL (the default) selection probabilities are determined solely by the pheromones.
deposit Which deposit rule to use. Can be either 'ib' (the default) for an iteration-best deposit rule, or 'gb' for a global-best deposit rule.
localization Which localization to use when depositing pheromones. Can be either 'nodes' (the default) for depositing pheromones on selected nodes or 'arcs' for depositing on selection arcs.

| pbest | The desired overall probability of constructing the global-best solution when the <br> algorithm convergels. Can either be a single value or an array with two columns <br> for parameter scheduling. See 'details'. |
| :--- | :--- |
| tolerance | The tolerance of imprecision when comparing the pheromones to the upper and <br> lower limits. Can either be a single value or an array with two columns for <br> parameter scheduling. See 'details'. |
| The counter which the scheduling of parameters pertains to. Can be either 'run' |  |
| (the default), for a continuous schedule, 'colony', for a schedule that is restarted |  |
| every time a new global best is found, or 'mixed' for a schedule that restarts its |  |
| current phase every time a new global best is found. See 'details'. |  |

## Details

The pheromone function provided via objective is used to assess the quality of the solutions. These functions can contain any combination of the fit indices provided by the estimation software. When using Mplus these fit indices are 'rmsea', 'srmr', 'cfi', 'tli', 'chisq' (with 'df' and 'pvalue'), 'aic', 'bic', and 'abic'. With lavaan any fit index provided by inspect can be used. Additionally 'crel' provides an aggregate of composite reliabilites, 'rel' provides a vector or a list of reliability coefficients for the latent variables, 'con' provides an aggregate consistency estimate for MTMM analyses, and 'lvcor' provides a list of the latent variable correlation matrices. For more detailed objective functions 'lambda', 'theta', 'psi', 'alpha', and 'nu' provide the model-implied matrices. Per default a pheromone function using 'crel', 'rmsea', and 'srmr' is used. Please be aware that the objective must be a function with the required fit indices as (correctly named) arguments.
Using model comparisons via the comparisons argument compares the target model to a model with one less degree of assumed invariance (e.g. if your target model contains strong invariance, the comparison model contain weak invariance). Adding comparisons will change the preset for the objective function to include model differences. With comparisons, a custom objective function (the recommended approach) can also include all model fit indices with a preceding delta. to indicate the difference in this index between the two models. If more than one type of comparison is used, the argument of the objective function should end in the type of comparison requested (e.g. delta.cfi.group to use the difference in CFI between the model comparison of invariance across groups).

The scheduling of parameters is possible for the arguments ants, colonies, evaporation, pbest, alpha, beta, tolerance, and deposit. For all of these parameter scheduling is done when an array
with two columns is provided. The first column of the array contains the timer, i.e. when to switch between parameter settings, the second column contains the values. The argument schedule can be used to select an absolute schedule (schedule='run'), a relative schedule which resets completely after a new global best is found (schedule='colony'), or a mixed version which resets the current phase of the schedule after a new global best is found (schedule='mixed'). When providing a parameter schedule for iterations 0,3 , and 10 using 'run' will result in a change after the third and the tenth iteration - irrespective of whether global best solutions were found. In contrast, using 'colony' will result in the first setting being used again once a new global best is found. This setting will then be used until iteration 3 (if no new best solution is found) before a switch occurs. If a new global best is found the setting will begin the sequence from the beginning. Using 'mixed' will result in the first setting being used until three consecutive iterations cannot produce a new global best. After this the second setting is used. If a new global best is found, the second setting is kept, but for the purpose of the schedule it is now iteration 3 again, meaning that the third setting will be used later than in a 'run' schedule.

## Value

Returns an object of the class stuartOutput for which specific summary and plot methods are available. The results are a list.

| call | The called function. |
| :--- | :--- |
| software | The software used to fit the CFA models. |
| parameters A list of the ACO parameters used. <br> analysis.options  |  |
| A list of the additional arguments passed to the estimation software.  <br> timer An object of the class proc_time which contains the time used for the analysis. <br> log A data.frame containing the optimization history. <br> solution A list of matrices with the choices made in the global-best solution. <br> pheromones A list of matrices with the pheromones of each choice. <br> subtests A list containing the names of the selected items and their respective subtests. <br> final The results of the estimation of the global-best solution. |  |

## Author(s)

Martin Schultze

## References

Stützle, T. (1998). Local search algorithms for combinatorial problems: Analysis, improvements, and new applications. Unpublished doctoral dissertation. Darmstadt: Fachbereich Informatik, Universität Darmstadt.

## See Also

bruteforce, gene, randomsamples, heuristics

## Examples

```
# MMAS in a simple situation
# requires lavaan
# number of cores set to 1 in all examples
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
# minimal example
sel <- mmas(fairplayer, fs, 4,
    colonies = 0, ants = 10, # minimal runtime, remove for application
    seed = 55635, cores = 1)
summary(sel)
# longitudinal example
data(fairplayer)
fs <- list(si1 = names(fairplayer)[83:92],
    si2 = names(fairplayer)[93:102],
    si3 = names(fairplayer)[103:112])
repe <- list(si = c('si1', 'si2', 'si3'))
# change evaporation rate after 10 and 20 colonies
sel <- mmas(fairplayer, fs, 4,
    repeated.measures = repe, long.invariance = 'strong',
    evaporation = cbind(c(0, 10, 20), c(.95, .8, .5)),
    seed = 55635, cores = 1)
# adding a predictor variable to selection model (using lavaan)
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
add <- 'si ~ IGS'
sel <- mmas(fairplayer, fs, 4,
    auxiliary = 'IGS',
    analysis.options = list(model = add),
    seed = 55635, cores = 1)
# inspect regression (in lavaan)
lavaan::coef(sel$final)
# same example, maximizing regression weight
obj <- function(chisq, df, pvalue, rmsea, srmr, beta) {
    beta[1, 'IGS']
}
sel <- mmas(fairplayer, fs, 4,
    auxiliary = 'IGS',
    analysis.options = list(model = add),
    objective = obj,
    seed = 55635, cores = 1)
```

```
# inspect regression (in lavaan)
lavaan::coef(sel$final)
```

randomsamples Generating random samples of Subtests

## Description

Construct a defined number of random subtests from a given pool of items.

## Usage

randomsamples( data,
factor.structure,
capacity = NULL,
item.invariance = "congeneric",
repeated.measures = NULL,
long.invariance = "strict",
mtmm = NULL,
mtmm.invariance = "configural",
grouping = NULL,
group.invariance = "strict",
comparisons = NULL,
auxiliary = NULL,
use.order = FALSE,
software = "lavaan",
cores = NULL,
objective = NULL,
ignore.errors = FALSE,
analysis.options = NULL,
suppress.model = FALSE,
seed = NULL,
request.override = 10000,
filename = NULL,
$\mathrm{n}=1000$,
percentile = 100
)

## Arguments

data A data.frame containing all relevant data.
factor.structure
A list linking factors to items. The names of the list elements correspond to the factor names. Each list element must contain a character-vector of item names that are indicators of this factor.
capacity A list containing the number of items per subtest. This must be in the same order as the factor. structure provided. If a single number, it is applied to all subtests. If NULL all items are evenly distributed among the subtests.
item.invariance
A character vector of length 1 or the same length as factor. structure containing the desired invariance levels between items pertaining to the same subtest. Currently there are five options: 'congeneric', 'ess.equivalent', 'ess.parallel', 'equivalent', and 'parallel', the first being the default.
repeated.measures
A list linking factors that are repeated measures of each other. Repeated factors must be in one element of the list - other sets of factors in other elements of the list. When this is NULL (the default) a cross-sectional model is estimated.
long.invariance
A character vector of length 1 or the same length as repeated.measures containing the longitudinal invariance level of repeated items. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When repeated.measures=NULL this argument is ignored.
mtmm A list linking factors that are measurements of the same construct with different methods. Measurements of the same construct must be in one element of the list - other sets of methods in other elements of the list. When this is NULL (the default) a single method model is estimated.
mtmm.invariance
A character vector of length 1 or the same length as mtmm containing the invariance level of MTMM items. Currently there are five options: 'none', 'configural', 'weak', 'strong', and 'strict'. Defaults to 'configural'. With 'none' differing items are allowed for different methods. When mtmm=NULL this argument is ignored.
grouping The name of the grouping variable. The grouping variable must be part of data provided and must be a numeric variable.
group.invariance
A single value describing the assumed invariance of items across groups. Currently there are four options: 'configural', 'weak', 'strong', and 'strict'. Defaults to 'strict'. When grouping=NULL this argument is ignored.
comparisons A character vector containing any combination of 'item', 'long', 'mtmm', and 'group' indicating which invariance should be assessed via model comparisons. The order of the vector dictates the sequence in which model comparisons are performed. Defaults to NULL meaning that no model comparisons are performed.
auxiliary The names of auxiliary variables in data. These can be used in additional modeling steps that may be provided in analysis.options\$model.
use.order A logical indicating whether or not to take the selection order of the items into account. Defaults to FALSE.

| software | The name of the estimation software. Can currently be 'lavaan' (the default), <br> 'Mplus', or 'Mplus Demo'. Each option requires the software to be installed. |
| :--- | :--- |
| cores | The number of cores to be used in parallel processing. If NULL (the default) the <br> result of detectCores will be used. On Unix-y machines parallel processing is <br> implemented via mclapply, on Windows machines it is realized via parLapply. |
| objective | A function that converts the results of model estimation into a pheromone. See |
| mmas for details. |  |

## Details

The pheromone function provided via objective is used to assess the quality of the solutions. These functions can contain any combination of the fit indices provided by the estimation software. When using Mplus these fit indices are 'rmsea', 'srmr', 'cfi', 'tli', 'chisq' (with 'df' and 'pvalue'), 'aic', 'bic', and 'abic'. With lavaan any fit index provided by inspect can be used. Additionally 'crel' provides an aggregate of composite reliabilites, 'rel' provides a vector or a list of reliability coefficients for the latent variables, 'con' provides an aggregate consistency estimate for MTMM analyses, and 'lvcor' provides a list of the latent variable correlation matrices. For more detailed objective functions 'lambda', 'theta', 'psi', 'alpha', and 'nu' provide the model-implied matrices. Per default a pheromone function using 'crel', 'rmsea', and 'srmr' is used. Please be aware that the objective must be a function with the required fit indices as (correctly named) arguments.

Using model comparisons via the comparisons argument compares the target model to a model with one less degree of assumed invariance (e.g. if your target model contains strong invariance, the comparison model contain weak invariance). Adding comparisons will change the preset for the objective function to include model differences. With comparisons, a custom objective function (the recommended approach) can also include all model fit indices with a preceding delta. to
indicate the difference in this index between the two models. If more than one type of comparison is used, the argument of the objective function should end in the type of comparison requested (e.g. delta.cfi.group to use the difference in CFI between the model comparison of invariance across groups).

## Value

Returns an object of the class stuartOutput for which specific summary and plot methods are available. The results are a list.

| call | The called function. |
| :--- | :--- |
| software | The software used to fit the CFA models. |
| parameters | A list of the parameters used. |
| analysis.options |  |

A list of the additional arguments passed to the estimation software.
timer An object of the class proc_time which contains the time used for the analysis.
$\log \quad$ A data. frame containing the estimation history.
solution NULL
pheromones NULL
subtests A list containing the names of the selected items and their respective subtests.
final The results of the estimation of the global-best solution.

## Author(s)

Martin Schultze

## See Also

bruteforce, mmas, gene

## Examples

```
# Random samples in a simple situation
# requires lavaan
# number of cores set to 1 in all examples
data(fairplayer)
fs <- list(si = names(fairplayer)[83:92])
# 10 random solutions, report median solution
sel <- randomsamples(fairplayer, fs, 4,
    n = 10, percentile = 50,
    seed = 55635, cores = 1)
summary(sel)
```


## Description

A scale for supervisor support with 19 items. The scale consists of two subscales: carreer promotion (items 1 through 12) and feedback and goal setting (items 13 through 19).

## Format

A data frame with 411 observations on 20 variables. The first variable indicates the person ID, the following 19 all stem from the scale for Supervisor Support

## Source

Janssen, A.B., Schultze, M., \& Grötsch, A. (2015). Following the ants: Development of short scales for proactive personality and supervisor support by Ant Colony Optimization. European Journal of Psychological Assessment.

## Index

```
* ACO subtests
    bruteforce, 3
    combinations,6
    crossvalidate, 8
    gene, 10
    heuristics,16
    holdout,18
    mmas, 19
    randomsamples, }2
* datasets
    fairplayer, }
    sups,29
bruteforce, 2, 3, 7, 8, 15, 23, 28
combinations, 2, 6,6
crossvalidate, 2, 8, 18
detectCores, 4, 12, 21,27
fairplayer, 2,9
gene, 2, 6, 7, 10, 23, 28
heuristics, 2, 16, 21, 23
holdout, 2, 8,18
inspect, 5, 13, 22, 27
mclapply, 4, 12, 21, 27
mmas, 2, 4, 6-8,15-17, 19, 21, 27, 28
parLapply, 4, 12, 21,27
Random, 13, 18, 22, }2
randomsamples, 2, 6, 15, 23, 25
stuart (stuart-package), 2
stuart-package, 2
sups, 2, 29
```

