

Data Sciences Institute
University of Toronto

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Asking questions

- Zoom chat during class
 - Feel free to post and answer questions at any time
 - Please use the raise hand feature for verbal questions
- Pre- / Post-class office hours with Tong
- Email
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Course objective

How to write robust software in a team that we, our colleagues, and the public can trust and use with confidence.

Today's learning objectives

- I can track and manage software projects using GitHub
- I can ensure code is reviewed and tested using Pull Requests
- I know the principles of software project governance



Review

Git commands

Setup

- git init
- git clone

Making edits

- git add
- git commit

Navigating through branches and commits

• git switch

Getting info

- git status
- git log

Incorporating changes

- git pull
- git merge



Review Why Git?

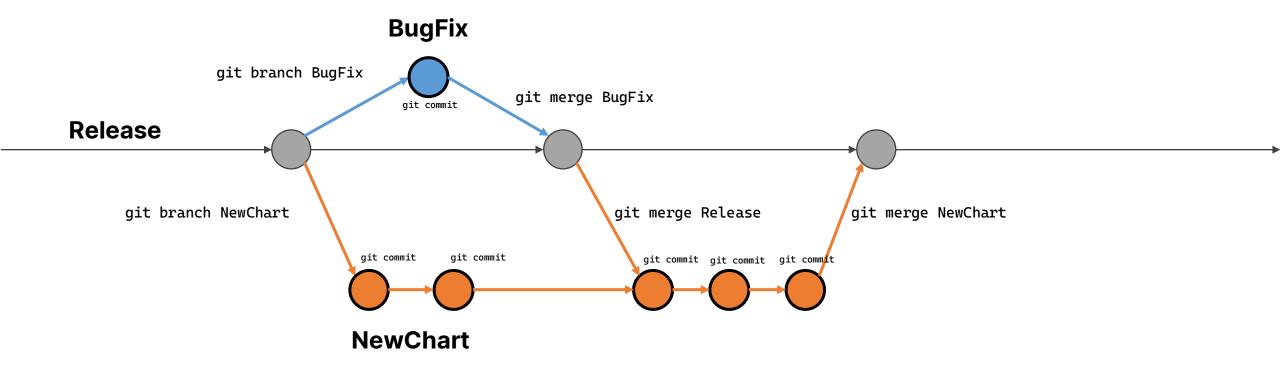
Scenario: Alex is a developer for a business-intelligence dashboard project.

- Alex's current big project is upgrading a financials chart on the dashboard home page
- Halfway through, Alex's colleague Jordan publishes a bug-fix on one of the analysis functions Sam uses for his chart
- Alex needs to integrate the updated analysis function into his work before shipping his upgraded chart to ensure it is correct.

Review

Alex's new feature

- 1. Alex starts working on NewChart
- 2. Jordan starts working on BugFix
- 3. Jordan ships BugFix
- 4. Alex integrates BugFix
- 5. Alex keeps working on NewChart
- 6. Alex ships NewChart



Why software project management?

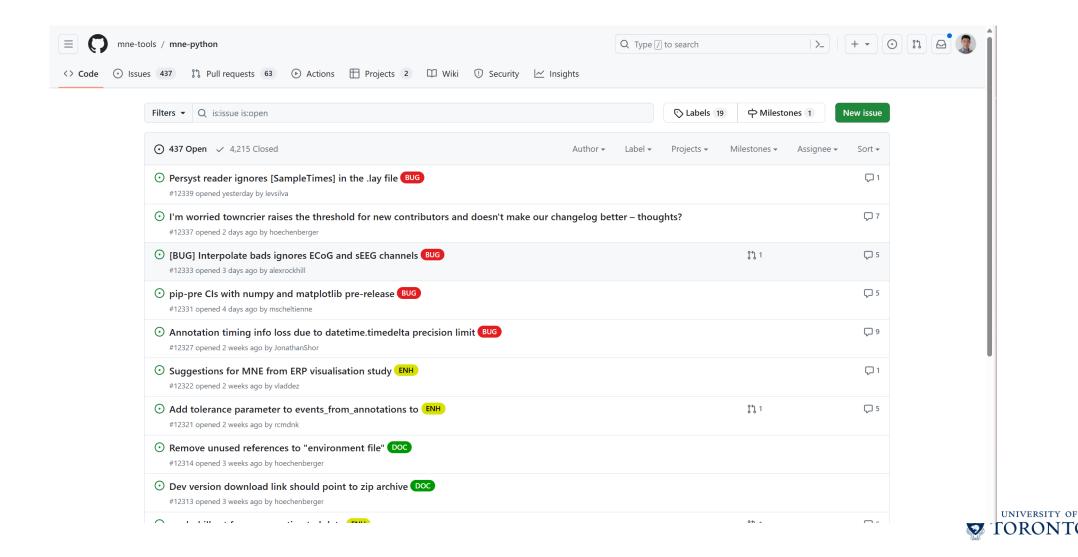
Scenario: Alex is a developer for a business-intelligence dashboard and is upgrading a financials chart on the dashboard home page

- Alex wants to gather ideas and feedback:
 - How the chart should look
 - How to make the analysis engine the most efficient
- Alex needs a place to track major discussion points on this feature

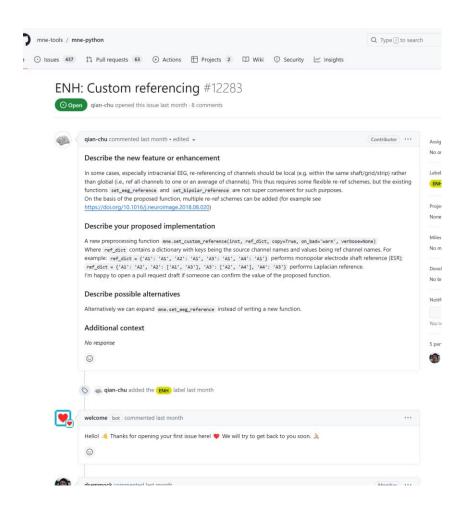
Working in software teams **GitHub**

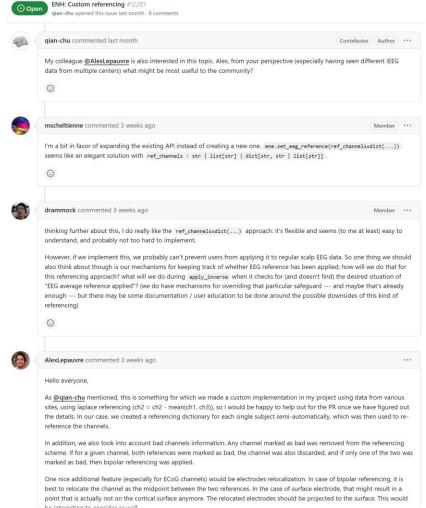
- Centralized hosting for Git repositories
- Project management features
 - Issues
 - Description of proposed or requested changes: update, features, bug-fixes, etc...
 - Can associated one or more pull-requests (proposed code changes)
 - Discussion thread
 - Projects
 - Linked to GitHub Issues
 - View Issues in tabular / Gantt chart view

GitHub Issues tracks proposed changes



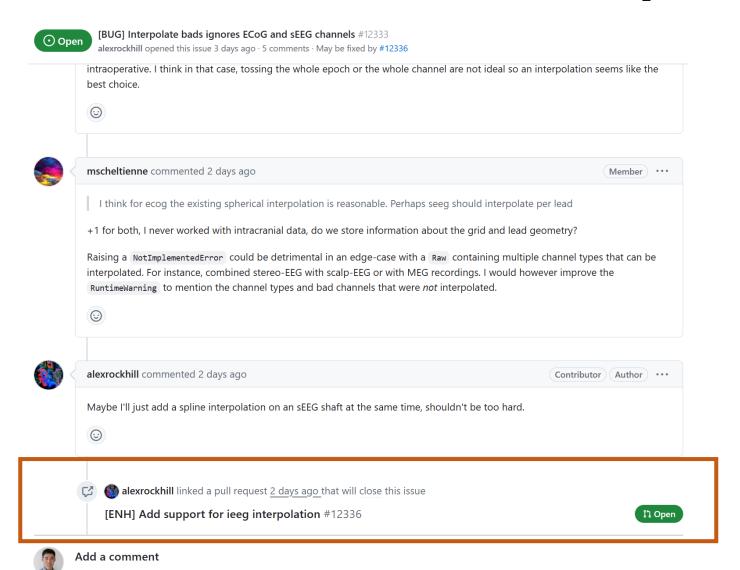
GitHub Issues allows for discussion





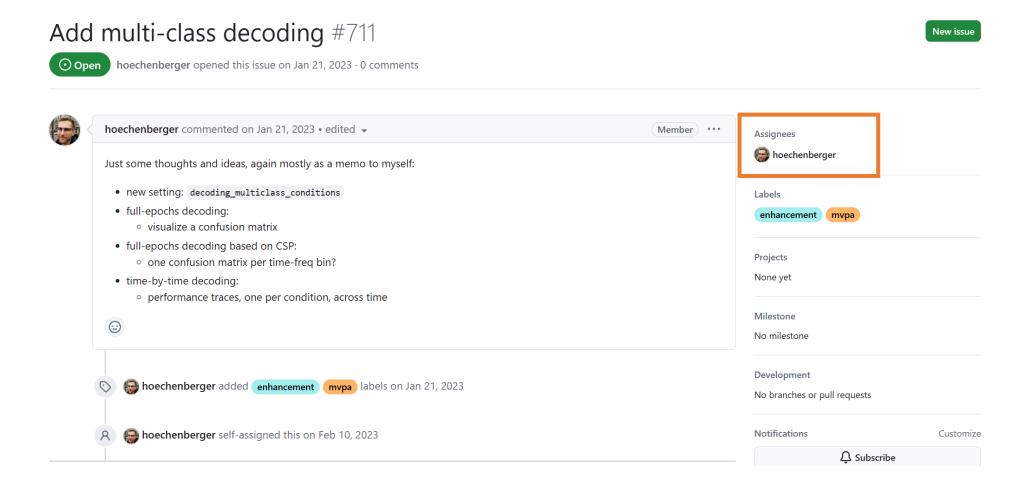


GitHub Issues + Pull Requests





GitHub Issues: Assignees



GitHub Issues: Best practices

What makes a well-written issue?

Bug reports

- Context: what are you trying to do overall?
- Reproducible example:
 - include enough code and a sample dataset to reproduce the error
 - what was the behaviour of the code?
 - what is the expected behaviour of the code?
 - include screenshots, error messages, and debugging logs!

GitHub Issues: Best practices

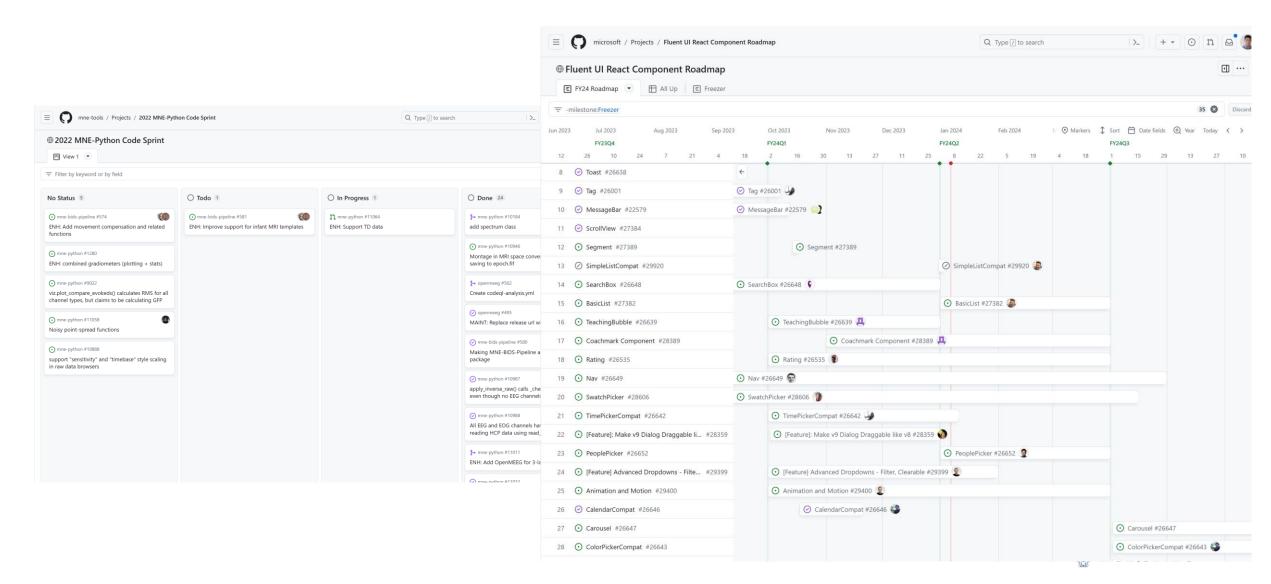
What makes a well-written issue?

Feature requests

- Overview: Describe the feature
- Scenarios:
 - provide user stories of how this feature could be used
 - provide a mockup of the feature you're envisoning
- Existing workflow:
 - describe what you're currently doing without this feature

Questions?

Working in software teams GitHub Projects



Why software project management?

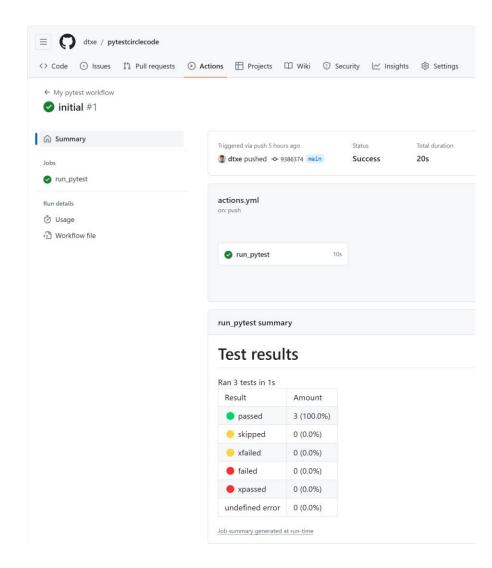
Scenario: Alex is a developer for a business-intelligence dashboard project.

- Alex's finishes his big project: upgrading a financials chart
- Avery, the engineering manager wants to make sure:
 - Alex's feature has been peer-reviewed
 - The new charting code integrates well into the dashboard
- Alex wants to make sure his colleagues can understand how to use his code

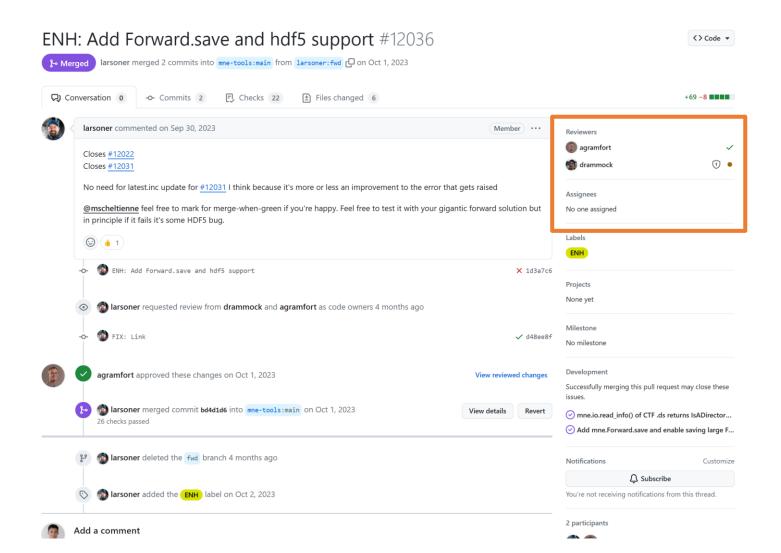
Working in software teams **GitHub**

- Continuous Integration
 - Alex's code is automatically tested with pytest on GitHub actions
- Code review and approvals
 - Alex can request a colleague to peer review his code and make comments overall, or even line-by-line
- Granular read/write access controls
 - Pull requests on the main repository can have requirements
 - e.g. must be approved by one or more colleagues, must pass all unit tests

Continuous integration code testing

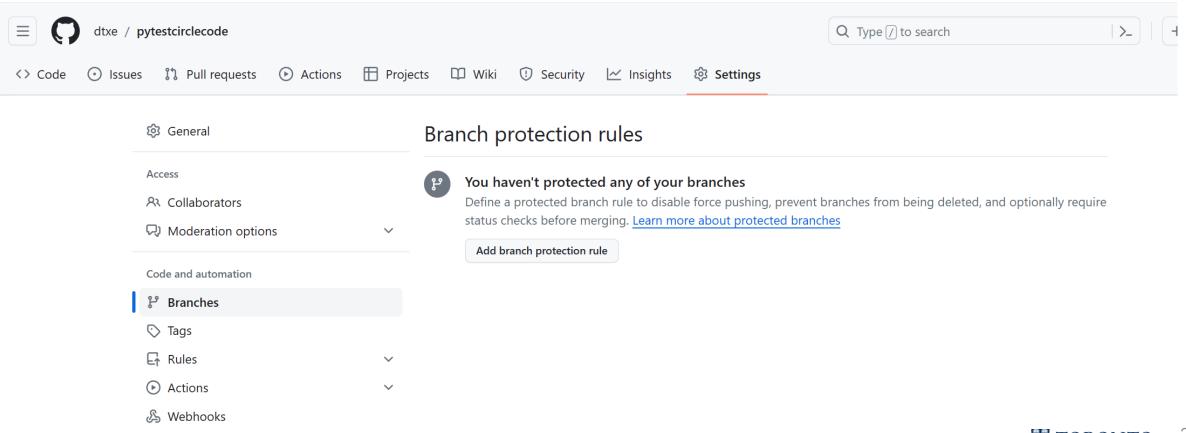


Assigned reviewers and approvers



Branch protection rules

Repository settings > Branches > Branch protection rules



Using GitHub features wisely

- GitHub features are part of a comprehensive code quality strategy
- Recall from code testing:
 Balance between impact/risk and engineering effort
 - Don't overburden your contributors and teammates with hoops to jump through if they don't contribute meaningfully to code quality

Other software project tools

Code repositories

- Atlassian Bitbucket
- GitLab
- AWS CodeCommit
- Azure Repos
- Google Cloud Source
- Self-hosted over SSH / WebDAV

Project tools

- Atlassian Jira
- GitLab
- Redmine
- ClickUp
- Monday.com
- Asana

Questions?

Software project governance

What makes up a project?

- A dataset being used by several research projects?
 - raw data, programs used to tidy the data, tidied data, text files describing license and provenance
- A set of annual reports written for an NGO?
 - jupyter notebooks, copies of html and pdf versions of the report, a text file containing links to datasets used in the report (which can't be store don Github since they contain personal identifying information)
- A software library providing an interactive glossary of data science terms in both Python and R?
 - files needed to create a package, a Markdown full of terms and definitions, a Makefile with targets to check cross references, etc

What makes up a project?

- What people have meetings about
- Governance: If the same group needs to get together on a regular basis to talk about something, that something probably deserves its own repository
- Continuity: And if the list of people changes slowly over time but the meetings continue, that's an even stronger sign

Copyright licenses

- A license dictates how project materials can be used and redistributed
 - Can affect the willingness of contributors
 - The choice of license is crucial to the project's long-term sustainability
- Consider contributors' contractual obligations
 - e.g. students and faculty may have a copyright on the research work they produce, but university staff members may not.
- Including an explicit license avoids legal messiness and should be chosen early on
 - Generally, licenses do not apply retroactively

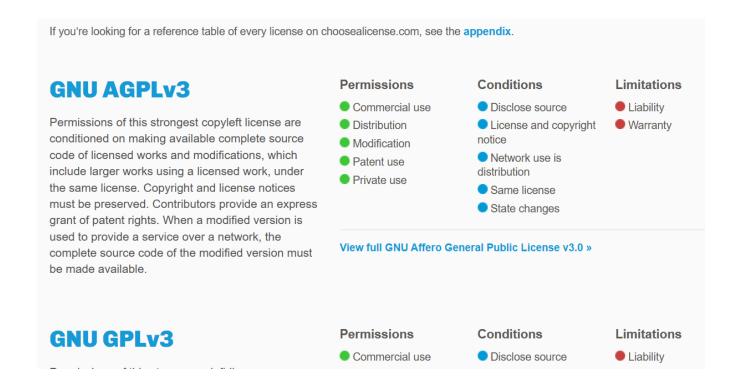
Copyright licenses

- Do we want to license the work at all?
- Is the content we are licensing source code?
- Do we require people distributing derivative works to also distribute their code?
- Do we want to address patent rights?
- Is our license compatible with the licenses of the software we depend on?
- Do our institutions have any policies that may overrule our choices?
- Are there any copyright experts within our institution who can assist us?

Project governance Copyright licenses

Great summary here:

https://choosealicense.com/licenses/



The Code of Conduct

- 1. Promotes fairness within a group
- 2. Ensures all members that this project takes inclusion seriously
- 3. Ensures that everyone knows what the rules are
- 4. Prevents anyone who misbehaves from pretending that they didn't know what the did was unacceptable

Often listed in a file named CONDUCT.md in project directory.

Example: https://www.contributor-covenant.org/

Decision making

- Every team has a power structure: formal (accountable) or informal (unaccountable).
- Importance of explicit governance in groups larger than six people.
- Objective: Establish who makes decisions and how to reach consensus.

Decision making: Martha's rules

- Anyone who wants to sponsor a proposal must file one at least 24 hours in advance. It must include:
 - a one-line summary
 - the full text of the proposal
 - any required background information
 - pros and cons
 - possible alternatives
- A quorum is established in a meeting if half or more of voting members are present
- Once a person has sponsored a proposal, they are responsible. The group may not discuss it unless the sponsor is present

Decision making: Martha's rules

- After the sponsor presents the proposal, cast a sense vote:
 - Who likes the proposal?
 - Who can live with it?
 - Who is uncomfortable with it?
- If everyone likes or can live with it, it passes with no further discussion.
- If most of the group is uncomfortable, it is sent back to the sponsor for further work. (The sponsor can decide to drop it)
- If some members are uncomfortable, a time is set to discuss, moderated by the meeting moderator.
 - After 10 minutes or so, the moderator calls a yes or no vote.
 - If the majority is yes, it passes.
 - Otherwise, it is returned to sponsor for further work.

Decision making: meeting tips

- 1. Decide if there actually needs to be a meeting.
- 2. Write an agenda.
- 3. Include timings in the agenda.
- Prioritize.
- 5. Make one person responsible for keeping things moving.
- 6. Require politeness.
- 7. No interruptions.
- 8. No distractions.
- 9. Take minutes.
- 10. End early.

Document everything!

Make sure your project description, licenses, code of conduct, decision making structures, meeting details are **discoverable** for newcomers!

Questions?

How to write robust software in a team that we, our colleagues, and the public can trust and use with confidence.

Git Assignment

- Due Monday Feb 12 at 6:00 pm
- This assignment is graded with pass/fail
- Feel free to work in groups and discuss, but the work you submit must be your own.

Upload to GitHub, then submit on Google Drive as a document