

# Reproducible Research in R

*2019-07-21*



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# Reproducible Research in R

- Level: beginner-intermediate
- Duration: 6 hours
- Student numbers: 25-30

Welcome to the Reproducible Research in R (RRR)<sup>1</sup> workshop. The main aim of this workshop is to set you on the right path of making your research more reproducible and shariaable. Reproducible research means that future you and anyone else will be able to pick up your analysis and reproduce the same results including figures and tables. Reproducible research also implies well documented reasearch, your code should be well commented and the reasons behind functions and methods should be well explained through out the analysis. The communication aspect should not be after thought, is should stay with your analysis as you are going through it. Rmarkdown is a way of literal programing<sup>2</sup> that keeps code and words and sentences together. The other important aspect that goes hand and hand with reproducibility is ability to easily collaborate and share your analysis. We are going to repurpose git version cotrol tool and leverage GitHub remote hosting provider for managing and sharining our work. Git + GitHub will provide very powerful way for global collaboration and exposure of your work. In this workshop we are going to verstion control our work and push it to github, which can then be accessible by your collaborators and supervisors. Git + GitHub should become integral part of your workflow.

The RRR course given by the Monash Bioinformatics Platform<sup>3</sup> for the Monash Data Fluency<sup>4</sup> initiative. Our teaching style is based on the style of The Carpentries<sup>5</sup>.

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<sup>1</sup><https://github.com/MonashDataFluency/r-rep-res>

<sup>2</sup><http://www.literateprogramming.com/knuthweb.pdf>

<sup>3</sup><https://www.monash.edu/research/infrastructure/bioinformatics>

<sup>4</sup><https://monashdatafluency.github.io/>

<sup>5</sup><https://carpentries.org/>

## Learning outcomes

Attendees will learn how to:

- write vanilla markdown, Rmarkdown and bookdown documents
- use `knitr`, `rmarkdown` and `bookdown` R packages to build various document types including PDF, HTML and DOCX
- create reproducible Rmarkdown documents leveraging `.Rproj` and `.RData`
- include inline citation and full references list in to Rmarkdown document using `.bib` files
- create presentations from Rmarkdown documents that include R code
- work with `git` version control tool
- create reproducible and “backed up” analysis via remote repositories (e.g github)

## Workshop description

This workshop is an introduction to writing and communicating research using Rmarkdown. Rmarkdown is an easy way to create documents that include your R code and its output such figure and tables. Rmarkdown is a single documents that can be “knitted” and shared as various document types such as PDF and HTML. Rmarkdown supports scientific writing such as use of citations and figure cross-referencing. Rmarkdown can also be used to create presentations that include your R code and its output. We will also cover bookdown, which is an extension to Rmarkdown that allows creation of larger documents such as books with multiple chapters.

In this workshop we will also cover git version control tool<sup>6</sup> that can help with organising and “checkpointing” Rmarkdown documents, associated R code and data. Git is not a back up system, but it does allow one to retrieve older versions of your work. Git together with remote repositories like GitHub<sup>7</sup> can provide centralised location for your research. All together Rmarkdown, git and github can enable reproducible research that is visible and accessible by greater public including supervisors and management.

## Prerequisite

This is an introductory level workshop, however some prior exposure to R and familiarity with RStudio is assumed. It is highly recommended that you read this article in full<sup>8</sup>, if you have to prioritise, read at least these section (1,2,6,10).

---

<sup>6</sup><https://git-scm.com/book/en/v1/Getting-Started-About-Version-Control>

<sup>7</sup><https://github.com>

<sup>8</sup><https://peerj.com/preprints/3159/>



Additionally it is highly recommended that you create an account at GitHub<sup>9</sup> and remember your password.

## Keywords

- R
- Rmarkdown
- communication
- reproducibility
- git and github

## Schedule

10:00-10:30am (30 minutes) Welcome and warm up

\( \ )/

10:30-12:00pm (1.5 hours) Rmarkdown

- Introduction (30 minutes)
- Vanilla markdown (30 minutes)
- Rmarkdown (30 minutes)

12:00-1:00pm (1 hour) lunch

1:00-3:00pm (2 hours) More Rmarkdown

- Git and GitHub markdown (40 minutes)
- More Rmarkdown (40 minutes)
- YAML header (40 minutes)

3:00-3:15pm (15 minutes) Tea break

3:15-4:45pm (1.5 hours) Even more Rmarkdown

- Bibliographies (30 minutes)
- Bookdown (30 minutes)
- Miscellaneous (30 minutes)

4:45-5:00pm (15 minutes) Warm down

---

<sup>9</sup><https://github.com>

## Authors and copyright

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**Part I**

**Part**



In this part of the book we will begin by talking about Rmarkdown language, where it has originated and the ecosystem that surrounds it. We are then going to look closely at the core parts of the Rmarkdown document. After that we will start with understanding basics of vanilla markdown as a building block of Rmarkdown. We will finish off this section of the book with hands on experience writing Rmarkdown documents with embedded R code chunks.



# Chapter 1

## Introduction to Rmarkdown

Rmarkdown has become much more than just embedding R code into a document. It enables construction of very sophisticated document types from plain text files. Rmarkdown file can become pdf documents and a static website at the same time. It can turn your analysis scattered across several different Rmarkdown documents into a single multi-paged books with cross-referencing and citations, let's call it a thesis or a paper or a course book. And with essentially no effort you can change from “rendering” your Rmarkdown into presentation slides instead of web-page, ready for a conference in little time. Rmarkdown is a natural evolution of vanilla markdown, backed and extended by the Rmrkdown ecosystem discussed shortly. Rmarkdown<sup>1</sup> isn't the only other flavour of markdown. There are other initiatives such as GitHub Flavored Markdown (GFM)<sup>2</sup> which mainly enhances content appears on github site and CommonMark<sup>3</sup> that tries to unify all the different flavours of markdown syntax, but all will converge to pandoc tool.

### 1.1 Rmarkdown core parts

Any Rmarkdown documents is broken into three main parts:

- YAML header
- The R chunks
- markdown - plain text

Those are different parts of the document that all work together to form - render

---

<sup>1</sup><https://rmarkdown.rstudio.com/>

<sup>2</sup><https://guides.github.com/features/mastering-markdown/>

<sup>3</sup><http://commonmark.org/>

a final document. Each one of those parts can be customised with further options, which will cover later in the book.

### 1.1.1 YAML header

YAML header will always seat at the very top of your Rmarkdown document and it starts and ends with triple dash symbols, ---. Note that YAML is indentation and space sensitive, meaning you need to be rather strict about amount of indentation you use and text strings will need to be quoted.

```
---
title: "Hello world"
author: "Kirill"
date: "17 June 2019"
output: html_document
---
```

### 1.1.2 The R chunks

These are special parts of the document that hold code that can be executed inline of the Rmarkdown document. R chunks are highly customisable via chunk options. We will spending a lot of time in the course working with code chunks and different options types.

```
```{r}
plot(mtcars)
```
```

### 1.1.3 Everything else is plain old markdown

```
# Have I been Marked Down?
```

## 1.2 Challenge: Introduction 1

5 minutes

1. What file extention should we typically use for saving our **R**markdown files?  
answer link<sup>4</sup>
2. What document types can be produced (compiled) from Rmarkdown?

---

<sup>4</sup><https://superuser.com/questions/249436/file-extension-for-markdown-files>



3. Will I have to learn more “languages” to use Rmarkdown (discussion question)?

The short answer is no. Learning and writing Rmarkdown will take you a very long way.

The longer answer is yes. At some point in the future you might want to very sophisticated documents and for that you’ll most certainly will need at least tiny amount of html + css knowledge and maybe some knowledge about LaTeX (I’ve yet to learn a single thing about LaTeX - so far so good :D )

check out this bit of Rmarkdown<sup>5</sup>

## 1.3 Rmarkdown ecosystem

Rmarkdown has relatively complicated ecosystem. It includes several different R packages. Most of those packages wrap other existing tools, written by different people, thereby providing an “easy” way to interface with the tools via R language. A large part of the ecosystem exists thanks to pandoc<sup>6</sup> tool.

### 1.3.1 Pandoc

Pandoc is a stand alone tool (command line tool) that one can run in the terminal to convert markdown documents to other documents types including html, pdf and MS docs. Since vanilla markdown is pretty simple in what it can produce, pandoc added whole lot of “features”, additional marking tags, that one can use to build more elaborate documents from plain text.

### 1.3.2 YAML

This is stand along language that is used in variety of places, with main advantage to it is that it can be easily ready by humans as well easily parsed by computer. A lot of the time YAML can be used ad a configuration file. This is example how it is used with Rmarkdown. We will talk about YAML in more depth in a different section. In brief we will use YAML to set documents appearance and link additional files with the documents, such as bibliographies.

### 1.3.3 LaTeX

~\\_()\\_/-

---

<sup>5</sup>[link%20to%20github%20that%20the%20line%20of%20code%20above](#)

<sup>6</sup><https://pandoc.org/>

### 1.3.4 Knitr

As was mentioned before we are using `pandoc`<sup>7</sup> to convert markdown to other document types. `knitr`<sup>8</sup> provides function to convert Rmarkdown files into various markdown, which then in turn can be converted by `pandoc` into html document for example. Some of the things that `knitr`<sup>9</sup> does includes R code execution and assembling the results into markdown.

### 1.3.5 Rmarkdown

An `rmarkdown` R package<sup>10</sup> will convert `.Rmd` files into other format types. Under the hood it will use `pandoc`<sup>11</sup> to do so. The main function that we are concerned with is `rmarkdown::render()` which will call `knitr::knit()` when required.

### 1.3.6 Bookdown

A `bookdown` R package<sup>12</sup> enhances `rmarkdown`<sup>13</sup> by enabling multi-page documents e.g books and easy cross-referencing.

### 1.3.7 Others

These are more R packages that enable more things via Rmarkdown.

- `xaringan`<sup>14</sup>
- `blogdown`<sup>15</sup>
- `thesisdown`<sup>16</sup>

## 1.4 RStudio project

RStudio provides a nice option to create a new project. This in turn will create a new folder with a couple of special features helping you to stay organised and “containerising” your project.

---

<sup>7</sup><https://pandoc.org/>

<sup>8</sup><https://yihui.name/knitr/>

<sup>9</sup><https://yihui.name/knitr/>

<sup>10</sup><https://github.com/rstudio/rmarkdown>

<sup>11</sup><https://pandoc.org/>

<sup>12</sup><https://github.com/rstudio/bookdown>

<sup>13</sup><https://github.com/rstudio/rmarkdown>

<sup>14</sup><https://github.com/yihui/xaringan>

<sup>15</sup><https://github.com/rstudio/blogdown>

<sup>16</sup><https://github.com/ismayc/thesisdown>

The following features apply to a project directory

- A new R session (process) is started
- The .Rprofile file in the project's main directory (if any) is sourced by R
- The .RData file in the project's main directory is loaded (if project options indicate that it should be loaded).
- The .Rhistory file in the project's main directory is loaded into the RStudio History pane (and used for Console Up/Down arrow command history).
- The current working directory is set to the project directory.
- Previously edited source documents are restored into editor tabs
- Other RStudio settings (e.g. active tabs, splitter positions, etc.) are re-stored to where they were the last time the project was closed.

Taken from here<sup>17</sup>

## 1.5 Setup

We will need to install these packages. Let's install these packages

```
packages <- c("tidyverse",
              "rmarkdown",
              "knitr",
              "bookdown",
              "tinytex",
              "citr")

keep <- packages[!(packages %in% installed.packages()[,"Package"])]

if(length(keep)) {
  install.packages(keep)
}
```

## 1.6 Challenge: Introduction 2

2 minutes

1. Now is a good time to tweak your RStudio to your needs.

- change font size
- change themes and background color

---

<sup>17</sup><https://support.rstudio.com/hc/en-us/articles/200526207-Using-Projects>

- rearrange panels
2. Please turn off “Restore .RData into workspace at startup” in “Tools -> Global Options”.

## 1.7 Useful tips

- don't attempt to compile to `pdf_document` until absolutely necessary. `LaTeX` engine that is used by Rmarkdown to pdf conversion known to have issues with aligning figures and tables. This typically causes figures and tables overflow to next pages and general text misalignment. Get your content written first, intermediate compilation to `html_documents` are totally fine, before worrying about technical issues
- don't save data into `.RData`, this will make your work less reproducible

## Chapter 2

# Vanilla Markdown

The original (vanilla) version of Markdown invented by John Gruber<sup>1</sup> defines a handful of tags, discussed next. Markdown is relatively small and simple language for writing plain text documents that are easy-to-write and easy-to-read, but it is greatly enhanced and extended by pandoc tool.

### 2.1 Vanilla tags

Let's open our first Markdown file.

File

New File

R Markdown

```
title = "Learning Rmarkdown"
```

```
author = "Me"
```

- select document type **HTML**
- to build (compile) the document press **knitr** button or **ctrl+alt+k**
- to save as **.Rmd** file

Since we are using RStudio and R it is inevitable that will be using Rmarkdown flavour, but we can still write only vanilla markdown and remember that under the hood Rmarkdown will always be converted to vanilla markdown.

From now onward we are going to start using **knitr** to compile Rmarkdown into html. Remember from the Rmarkdown ecosystem<sup>2</sup> that **knitr** will convert Rmarkdown to markdown and **rmarkdown** R package will convert - render

---

<sup>1</sup><https://en.wikipedia.org/wiki/Markdown>

<sup>2</sup>

markdown file into html. By pressing that blue button both things will happen automatically and we don't need to think about, but I wanted you to know that.

These are essentially all core (vanilla) markdown tags. Let's practice writing them.

```
# Header1
## Header2
### Header3
```

Paragraphs are separated  
by a blank line.

Two spaces at the end of a line  
produces a line break.

Text attributes *\_italic\_*,  
**\*\*bold\*\***, ``monospace``.

Horizontal rule:

```
---
```

Bullet list:

- \* apples
- \* oranges
- \* pears

Numbered list:

1. wash
2. rinse
3. repeat

A [link](http://example.com).

![Image](Image\_icon.png)

> Markdown uses email-style  
> characters for blockquoting.

## 2.2 Practice vanilla markdown

Now it's just a matter of learning some of the markdown syntax. Let's delete all current text from the opened document except the YAML header and type this new text in `Hello world, I'm learning R markdown !` and pressing the `knit HTML` button.

```
Hello world, I'm learning R markdown !
```

Not much happened. This is because we didn't mark our text in any way. You can put as much text as you want and it will appear as is, unless "specially" marked to look differently.

Now add the `#` symbol at the start of the line and press the `knit HTML` button again. We'll be pressing this button a lot! For those who like keyboard short cuts use `ctrl+shift+k` instead.

```
# Hello world, I'm learning R markdown !
```

How about now? A single hash symbol made it whole lot bigger didn't it? We've marked this whole line to be the header line.

Now make three new lines with the same text, but different numbers of `#` symbols, one, two and three respectively and keep pressing the `Knit HTML` button

```
# Hello world, I'm learning R markdown !
## Hello world, I'm learning R markdown !
### Hello world, I'm learning R markdown !
```

This is how you can specify different headers type using markdown.

**Remember** that vanilla markdown<sup>3</sup> is comprised entirely of punctuation characters.

## 2.3 Challenge: Markdown 1

5 minutes

1. How to mark text so that it appears underlined? answer link<sup>4</sup>

---

<sup>3</sup><https://daringfireball.net/projects/markdown/syntax>

<sup>4</sup><https://softwareengineering.stackexchange.com/questions/207727/why-there-is-no-markdown-for-underline>

2. Can markdown replace html<sup>5</sup> (discussion question)? It has replaced html and latex in documentation and communication of results. My feeling is that data science ecosystem heavily rotates around markdown. But html, pdf and latex in this context are simply communication and sharing medium. One would not want to replace html + css for large website project

---

<sup>5</sup><https://en.wikipedia.org/wiki/HTML>



## Chapter 3

# Rmarkdown

The reason that we are learning Rmarkdown<sup>1</sup> is because it gives us very straight forward way of writing plain text documents with inline R code that will become a very sophisticated document types. The bonus points also come from the fact that Rmarkdown files are easy to version control (git) and see the difference between versions. This approach of interleaving analysis code, commentary and description is very explicit, which has direct implication in reproducibility, shearability and collaboration.

In Markdown section I've showed you how to start new Rmarkdown document in RStudio, but lets briefly recap how we do that again.

File

New File

R Markdown

```
title = "Learning Rmarkdown"
```

```
author = "Me"
```

- select document type **HTML**
- to build (compile) the document press **knitr** button or **ctrl+alt+k**
- to save as **.Rmd** file

### 3.1 Embedding R code

RStudio templates **.Rmd** file for us. However lets delete all the text after the **yml** header.

---

<sup>1</sup><https://rmarkdown.rstudio.com/>

```

---
title: 'Learning Rmarkdown'
author: 'Kirill'
date: '21/06/2019'
output: html_document
---

```{r setup, include=FALSE}
knitr::opts_chunk$set(echo = TRUE)
```

```

I'm going to explain `knitr::opts_chunk` in later section. An R chunk is a “special” block with in the document that will be read and evaluated by `knitr`, ultimately converting everything into plain markdown. But for us it means that we can focus on our analysis and embed R code without having to worry about it. Additionally there are large number of chunk options that helps with different aspects of the document including code decoration and evaluation, results and plots rendering and display.

This is an R code chunk.

```

```{r}

```

```

The little `r` there specifies the “engine”, basically telling Rmarkdown how to evaluate the code inside the chunk. Here we are saying use R engine (language) to evaluate the code. The list of languages<sup>2</sup> is rather long, hence why earlier comments about Rmarkdown spanning much greater area than one might think. In this workshop we are only going to focus on R language.

Let's write our first bit of R code inside the Rmarkdown document. First we need to start a new R chunk, which can be done in either of three ways:

- simply type it out
- press insert button at the top of the window
- `ctrl+alt+i`

Let's start with a simple `print()` statement and print `Hello world, I'm learning Rmarkdown !` string, except we are going to split it between two variable

```

```{r}
a <- 'Hello world, Im learning Rmarkdown !'
a
```

```

---

<sup>2</sup><https://bookdown.org/yihui/rmarkdown/language-engines.html>

Note that each chunk can be run independently in the console by pressing `ctrl+enter` or little green arrow.

Each code chunk is highly customisable via chunk options<sup>3</sup>. We are going to learn a few today, but we won't be able to cover all of them. You probably never going to use some of them, but as long as you know what to look for you'll be able to search for then. Note that all chunk options have a default value. Not specifying an options means you are using the default value. These are chunk options that we are going to cover today.

| name       | value     | type            | description   |
|------------|-----------|-----------------|---|
| child      | NULL      | code_evaluation | A character vector of filenames. Knitr will knit the files and place them   |
| engine     | 'R'       | code_evaluation | Knitr will evaluate the chunk in the named language, e.g. engine = 'py'     |
| eval       | TRUE      | code_evaluation | If FALSE, knitr will not run the code in the code chunk.                    |
| include    | TRUE      | code_evaluation | If FALSE, knitr will run the chunk but not include the chunk in the fin     |
| fig.align  | 'default' | plots           | How to align graphics in the final document. One of 'left', 'right', or 'ce |
| fig.cap    | NULL      | plots           | A character string to be used as a figure caption in LaTeX.                 |
| fig.height | 7         | plots           | The height to use in R for plots created by the chunk (in inches).          |
| fig.width  | 7         | plots           | The width to use in R for plots created by the chunk (in inches).           |
| echo       | TRUE      | results         | If FALSE, knitr will not display the code in the code chunk above it's r    |
| results    | 'markup'  | results         | If 'hide', knitr will not display the code's results in the final document. |
| message    | TRUE      | results         | If FALSE, knitr will not display any messages generated by the code.        |
| warning    | TRUE      | results         | If FALSE, knitr will not display any warning messages generated by the      |

General layout of any chunk is

```
```{r chunk_name, options}
...
```
```

Note a couple of things, there isn't a comma between `r` and `chunk_name`. Not sure why this is.. Also note that `chunk_name` is optional, you can skip it, as we have in earlier examples. Naming chunks is good idea to conceptually label the chunk as to what it does, but also we you are going to build more sophisticated documents you'll be able to selectively include chunks by refer to them by the chunk name.

Lets start off with these four chunk options:

- `echo` show what has been typed in i.e show the code
- `eval` evaluate or execute that code
- `include` include execute code into the document, relies on `eval = TRUE`
- `results` hide resulting output

These allow us fine level control over the final document. Think about who are generating the document for and what type of information you need to share.

<sup>3</sup><https://bookdown.org/yihui/rmarkdown/r-code.html>

Sometimes we might want to show the code, but not execute it and other times we might just want to execute it and share the results, e.g plot, without actually showing the code.

### 3.1.1 echo and eval

Let's start with `echo = TRUE` and `eval = TRUE`.

```
```{r echo = T, eval = T}
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```
```

```
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```

```
## [1] "Hello world, Im learning Rmarkdown !"
```

Now let's turn echo off, `echo=FALSE`.

```
```{r echo = F}
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```
```

```
## [1] "Hello world, Im learning Rmarkdown !"
```

Okay, we don't see our original `print()` statement. And now let's pass `eval=FALSE` options instead

```
```{r eval = F}
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```
```

```
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```

### 3.1.2 include

This option also helps to manipulate your final document look. This option dictates whether the output of the executed code will be included into the final document. Sometimes you can simply trigger `eval` flag to achieve similar result of code now being included, but other times you might want the code to actually be executed but not included. For example when future R chunk relies on the output of this intermediate chunk, but there is now need to include that into the document.

```
```{r echo = T, eval = T, include = F}
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```
```

```
```{r, echo = T, include = T}
ab
```
```

```
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```

```
ab
```

```
## [1] "Hello world, Im learning Rmarkdown !"
```

### 3.1.3 results

Now we see the code, but not the output. The difference between `echo` and `results` is subtle, at least in my head. Let's consider the following example.

```
```{r echo = T, eval = F, results = 'asis'}
a <- 'Hello world,'
```

```
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```

```

```
```{r}
ab
```

```

```
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```

```
ab
```

```
## [1] "Hello world, Im learning Rmarkdown !"
```

Let's turn results = 'hide'

```
```{r echo = T, eval = F, results = 'hide'}
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```
```{r}
ab
```

```

```
a <- 'Hello world,'
b <- 'Im learning Rmarkdown !'
ab <- paste(a, b)
print(ab)
```

```
[1] "Hello world, Im learning Rmarkdown !"
```

```
ab
```

```
## [1] "Hello world, Im learning Rmarkdown !"
```

And now we only see `print()` statement and no output.

## 3.2 Challenge: Rmarkdown 1

3 minutes

1. Go through all of your code so far and give each chunk a name

```
```\n{r chunk_name, options}\n```
```

## 3.3 important blob about include vs results

Note that if `include=FALSE`, all of the code, results, and figures will be suppressed. If `include=TRUE` and `results="hide"`, the results will be hidden but figures will still be shown. To hide the figures, use `fig.show="hide"`.

There are lots of different possible “chunk options”. Each must be real R code, as R will be used to evaluate them. So `results=hide` is wrong; you need `results="hide"`.





Part II

Part



## Chapter 4

# Git and GitHub introduction

When you are rock climbing you want to set your anchors often  
How often will depend on your experience and desire not to fall Git  
commit like you are vertically hanging off 70 feet rock

I going to break to you right at the start that (unfortunately) doing git and GitHub is like rock climbing, but nonetheless it has great benefits for your research and analysis including making it more visible, reproducible and potentially very collaborative.

Git<sup>1</sup> is one of many tools, but it is very popular. Git was design for **tracking versions** of software development - a.k.a version control tool. While it hasn't been strictly design with scientific research projects in mind we will happily re-purpose git to help us stay on top of our research projects. In git world everything rotates around git repository, which is "special" folder. Inside that folder every file and folder is "tracked" for changes. Git repositories often are synonymous with project folder. In our case an RStudio project folder will be the same as git folder. In other words we are going to tack all changes in our project. Note that two, git and RStudio project, are independent of each other and you can use one or another or both.

Below I am trying to illustrate of the differences between of do-it-yourself (DIY) version control system, which may be great, and git version control. DIY version control systems are great with two caveats:

- no one else will understand it
- the future you will forget the awesome schema that you have invented

---

<sup>1</sup><https://git-scm.com/doc>

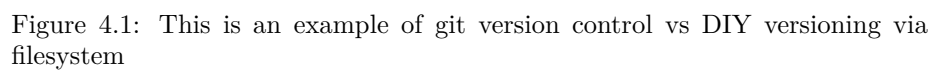


Figure 4.1: This is an example of git version control vs DIY versioning via filesystem



Figure 4.2: <https://www.geekboots.com/story/what-is-the-difference-between-bitbucket-github-and-gitlab>

From now onwards we are going to **git** version control tool. We are also going to use GitHub for storing our files remotely. GitHub isn't the only place that people can use with **git** for file storage and sharing. Below an illustration of some other common place one can choose to store they **git** repositories a.k.a projects.

In theory and can also store **git** repositories in google drive or dropbox or other similar places, however neither those places haven't been optimised for **git** version control repositories. We will talk shortly about advantages that GitHub brings to the project.

For this workshop we are going to use GitHub, mainly because is very popular and it has a lot of useful features.

## 4.1 Quick summary

Git and GitHub will help you:

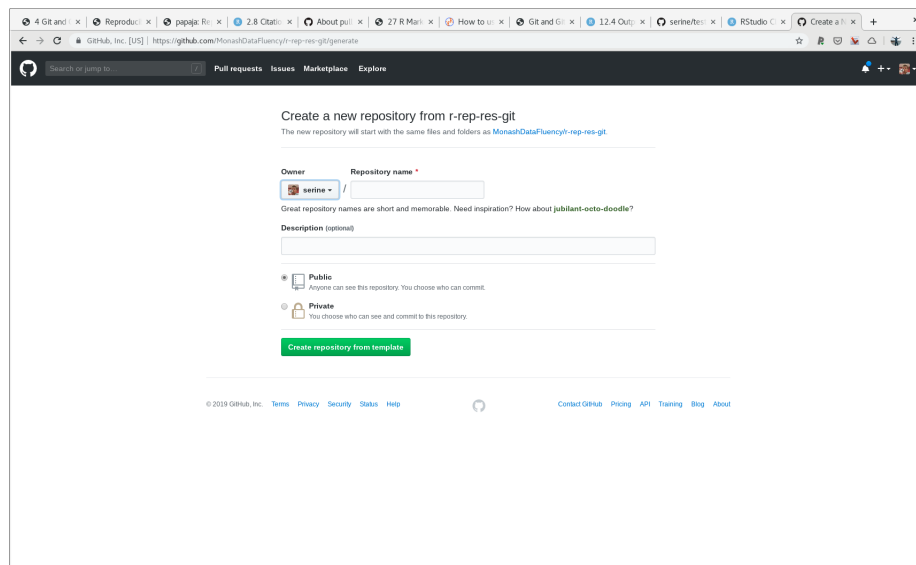
- organise our directory structure
- create “milestones” a.k.a **git commits**
- make apparent which parts of the projects (files) are important
- share your work (e.g GitHub)
- collaborate at the global scale

## 4.2 Github setup

There are a couple of different ways you can start a project and initiate git repository - git tracking. We are going to start with GitHub first approach. An alternative approach discussed in appendix section D. I hope that everyone had already created GitHub<sup>2</sup> account. We are going to make new github repository from this template<sup>3</sup>.

- sign in to github [github.com](https://github.com)<sup>4</sup>
- head over to <https://github.com/MonashDataFluency/r-rep-res-git>
- click “Use this template”

You should see a screen like this



- Repository name “learning\_rmarkdown”
- Description “I’m learning Rmarkdown, yay!”
- click “Create repository from template”

Note that description of the repository is optional, but a good idea to write a brief sentence there to message yourself and the public what this project is about.

<sup>2</sup><https://github.com/>

<sup>3</sup><https://github.com/MonashDataFluency/r-rep-res-git>

<sup>4</sup><https://github.com>

Once we have our GitHub repository we need to find a link (URL) and copy a.k.a **clone** (git clone) our repository to our working computer, in our case `rstudio.cloud`<sup>5</sup>. We want to establish connection between `rstudio.cloud`<sup>6</sup> and GitHub such that we can with little effort we can copy our work, that is file from `rstudio.cloud`<sup>7</sup> to GitHub.

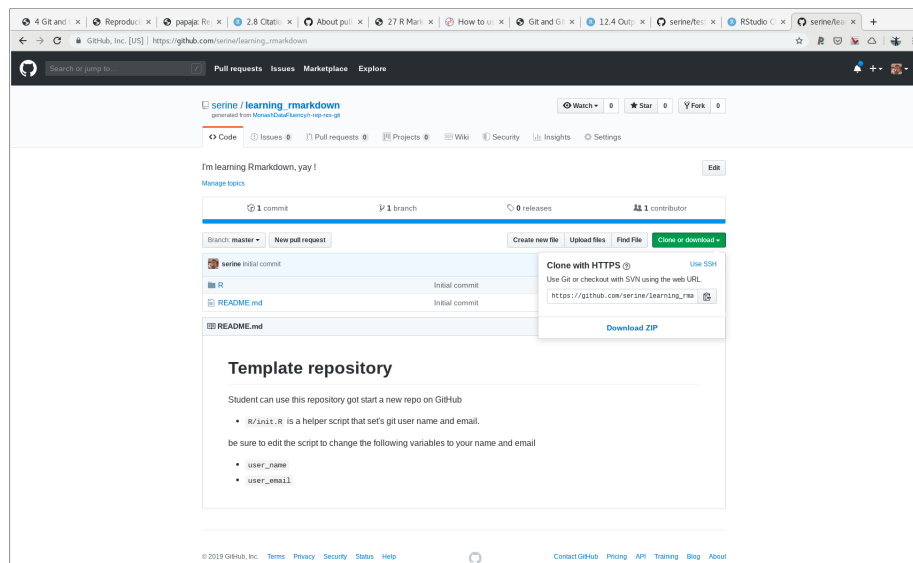
This is how typical URL looks like

```
https://github.com/kirill/learing_rmarkdown.git
```

There are at least three components in that url

- `https://github.com/` the place i.e the name of the website
- `kirill/` username
- `learing_rmarkdown.git` repository name (project name)

You can get this url, but either looking at the address bar of your browser or there is a little drop down menu on the right hand site.



Note that by creating new github repository we are automatically initialising git for version tracking. Remember that GitHub is just a place where we are storing our git repository.

---

<sup>5</sup>`https://rstudio.cloud`

<sup>6</sup>`https://rstudio.cloud`

<sup>7</sup>`https://rstudio.cloud`

### 4.3 RStudio setup

Add description about starting a project from a github at RStudio.

### 4.4 GitHub things

- PR (pull request)
- gitissues place to talk about issues related to a project
- stars acknowledgement
- watch interested in updates on a projects

collaborators and update dates/commits as a proxy of how active the project is. also do check which files typically being changed. Also mention the fact that it is very explicit when the project was started (initiated) how much work has gone into it (commits history) and roughly time frame and intervals of work

in simple workflow and collaborations git merge will work just fine. git will happily merge two different branches i.e all files in one location with all files in the other location if no two file conflict

### 4.5 More git

Git is a command line tool however you don't have to learn command line just yet. There are a few git clients available<sup>8</sup> - graphical user interface (GUI) tool / applications that we can use instead of learning command line. We are going to use RStudio which has good git support and therefore Rstudio will be our git client. One rather important note about git clients, most (all) clients will "simply" form a git commands as you would type it out and execute on command line. This means a couple of things:

1. one can use mixture of clients and command line without any issues. For example if one needs more complicated git command one could run it on the command-line.
2. if you need to do a more complicated git kung fu you might only find solution for command line and then it'll be up to you to figure out how to work it into your client

An interesting note about command line git usage noted in Happy Git with R book<sup>9</sup>; One might think that git via cli is "better", however it is more important to get the work done and have it version controlled rather than fight with the

---

<sup>8</sup><https://happygitwithr.com/git-client.html>

<sup>9</sup><https://happygitwithr.com/git-client.html>



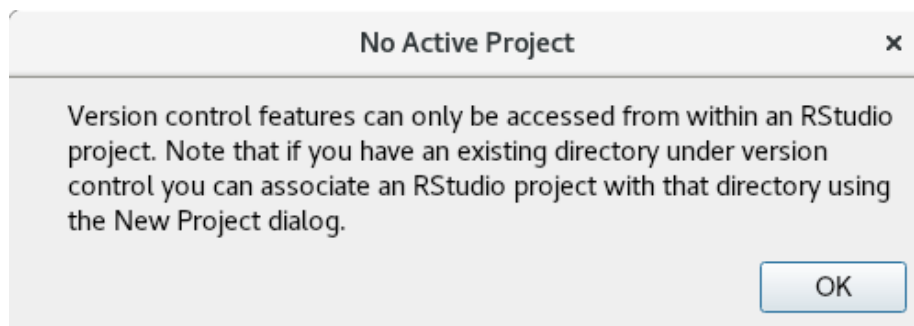
cli. Do take the simplest and quickest path to get your work version controlled. No one will care which client you are using in the end.

## 4.6 git no nos

- no spaces in file names (this goes beyond git)
- no git repositories inside an existing git repository

## 4.7 Starting with git

In Rstudio you can only start working with git when you have an existing Rproject directory



### 4.7.1 Configuring git

You will most certainly forget this step, because you only need to do it once per computer (or new installation of git). Git will remind if you haven't done these steps. These are our very first step in being organised and ready for future collaboration. We need to let git know our name and email address, which will get stored in configuration file.

Unfortunately RStudio doesn't have support for setting up config. It was probably not worth implementing given that you only really do it once. We will have to use terminal (command line) just this once.

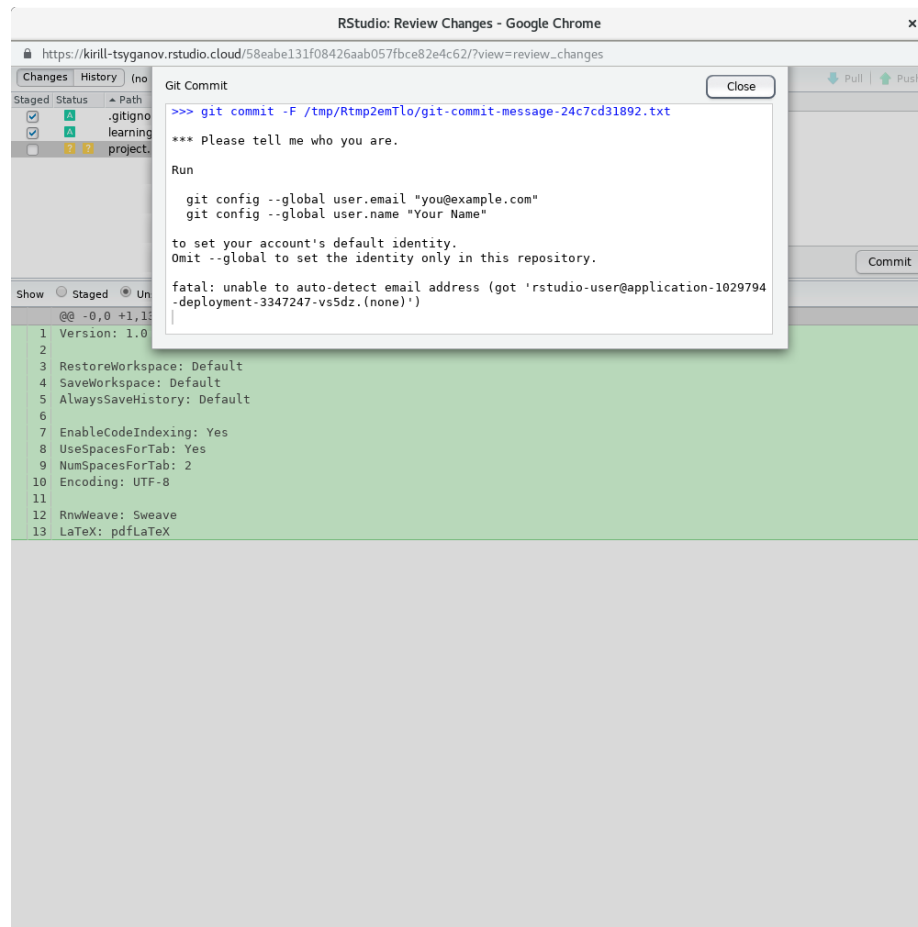
Let's open up a terminal and run a couple of `git` commands

Tools -> Terminal -> New Terminal

```
git config --global user.name kirill
git config --global user.name "kirill.tsyganov@monash.edu"
```

One can then double check that all was set correctly bu running this command.

```
git config --global --list
```



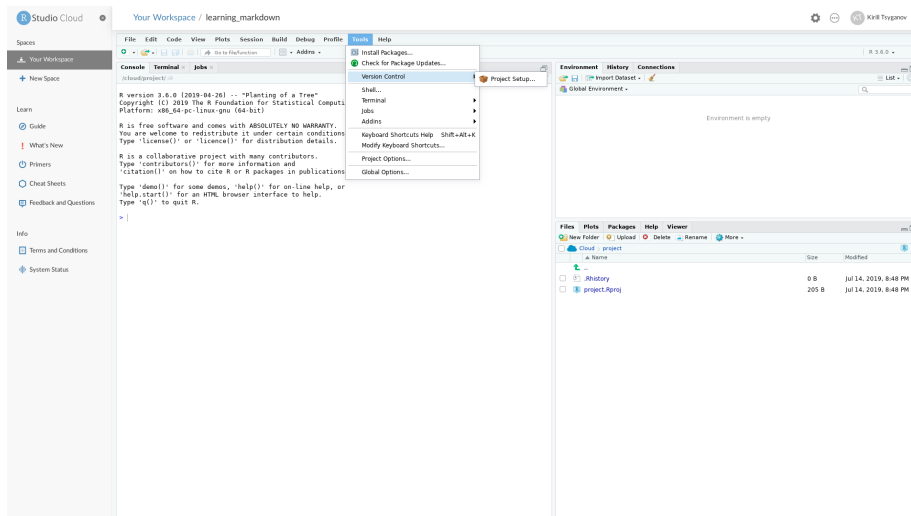
### 4.7.2 Initiating git repository

In git jargon repository is simply your working folder (folders sometimes also called directories). In our case

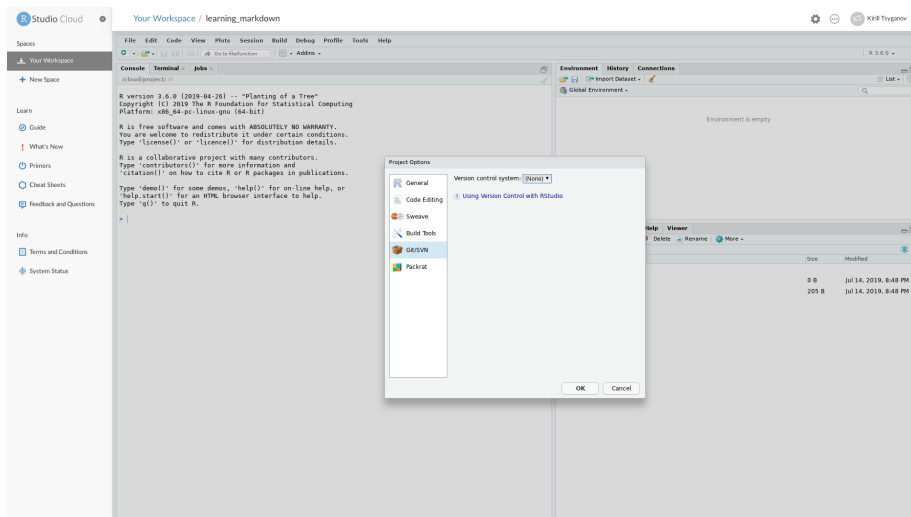
```
Rproject folder == Rproject directory == git repository == git repo
```

Let's initiate git repository

Tools -> Version Control -> Project Setup -> Git/SVN



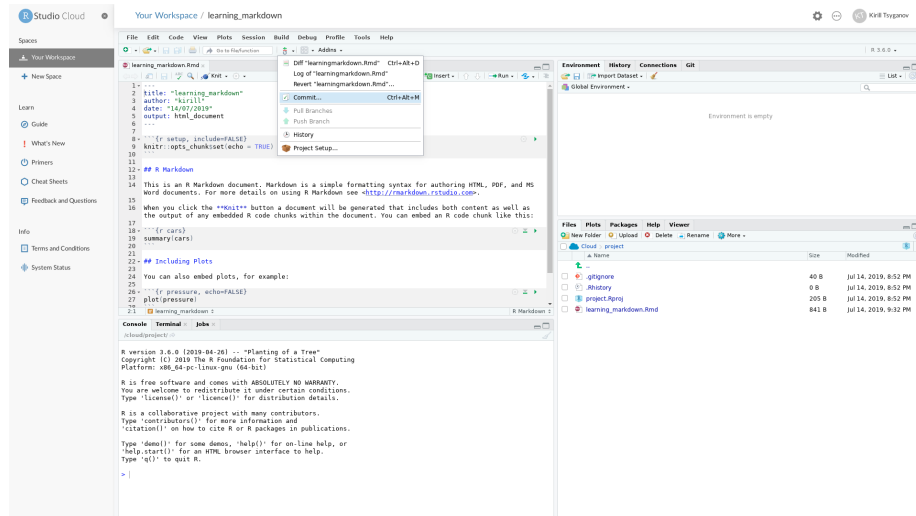
And select from the drop down options “Version control system” Git



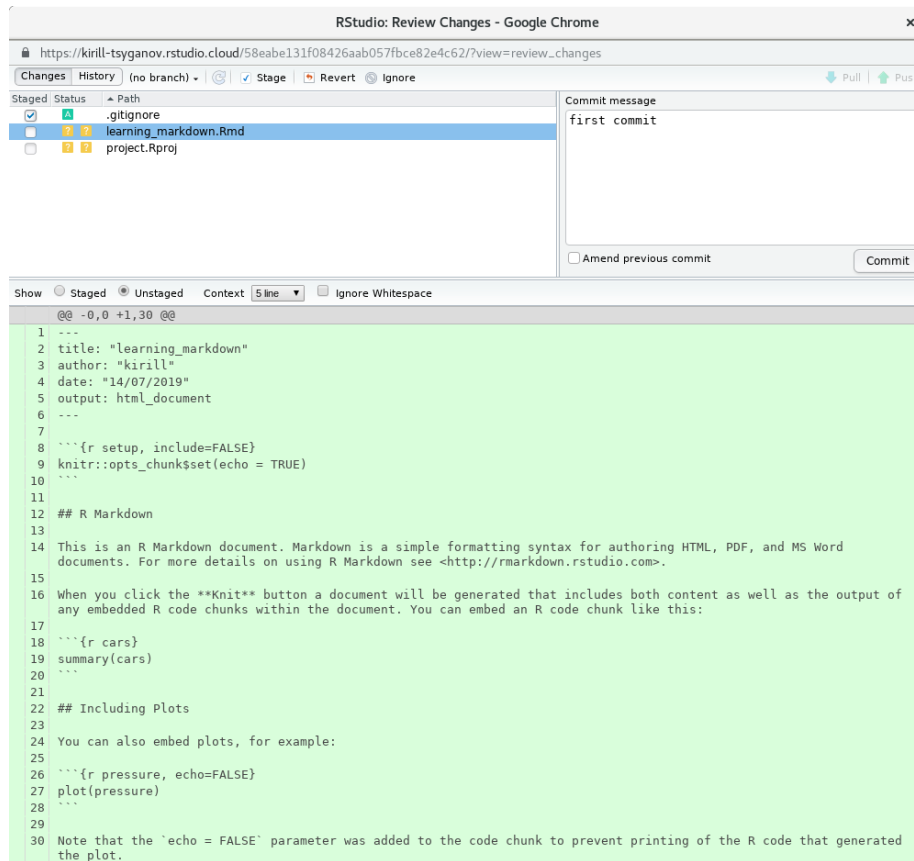
The command line equivalent is navigating to your project directory and running `git init`

### 4.7.3 First commit

Let’s make our first commit, use drop down menu as indicated on the image below to select `commit` option



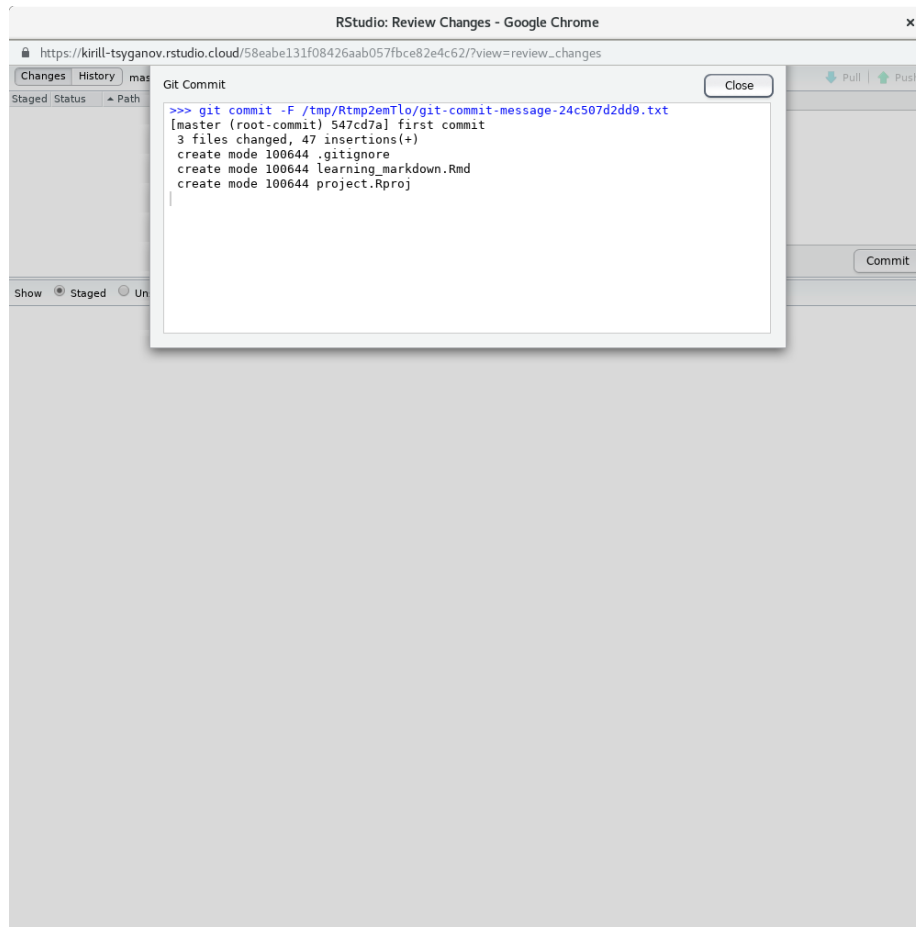
You should see a new window popped up



Then we are going to add three files

- `.gitignore`
- `project.Rproj`
- `learning_markdown.Rmd`

Write a commit message and press commit. And this is how happy git commit looks like



The commit message is rather important. Remember that commit message is:

- a message to a future you
- a message to your supervisor
- a message to all other external people

Those commit messages are means of communications e.g

- “fixed figure 1 legend”
- “added new paragraph to chapter 1”
- “I bloody hate this project delete everything, starting from scratch”

Good thing is, as long as you “tracking” your deletes you can always go back to them and check what you have deleted and revert some of those changes back when needed. However in this workshop we won’t be covering much of that.

Also note that commit message don't have to long, and can be as short as one work - "update2", but at the same time well written commit message will help you and other.

<http://r-pkgs.had.co.nz/git.html#commit-best-practices>

## 4.8 Which files to commit?

This section will be extended in the future release, but I highly recommend reading this article, specifically section 10: Which files to commit from here<sup>10</sup>

---

<sup>10</sup><https://peerj.com/preprints/3159/>





## Chapter 5

# More Rmarkdown

We are going to increase the difficulty a little bit and we are going to start working towards our final document<sup>1</sup>.

Typically you will have some data set that you are trying to analyse and later present. There are likely to be some other prior steps before you get your tabular data. Those prior steps should also be documented. In this workshop we are going to start with a tabular data set straight away. We are going to use Domestic Airlines - On Time Performance<sup>2</sup> data set from data.gov.au<sup>3</sup>

### 5.1 Setup

First thing first is we need to download data. `read_csv()` function from **readr**<sup>4</sup> package can “read” directly from url, but we are going to “cache” a file first and then we are going to reference our local copy. This will shorten our final html building time. We should also check licence on the data set, especially if you are going to publish some of your analysis. This data is *Creative Commons Attribution 3.0 Australia* licence, there is no problem in downloading and using the data.

Let's open new Rmarkdown file and delete everything from it except the yaml header.

---

<sup>1</sup>[examples/single\\_page\\_report.html](https://examples/single_page_report.html)

<sup>2</sup><https://data.gov.au/data/dataset/domestic-airline-on-time-performance>

<sup>3</sup><https://data.gov.au>

<sup>4</sup><https://readr.tidyverse.org/>

### 5.1.1 Setting global chunk options

As you have learned already you can manipulate each R chunk with options, but you can also set global settings for each chunk. Let's set `echo = TRUE` and `message = FALSE` globally. This means every R chunk will be echoed i.e shown in the final document and no messages will appear anywhere in the document.

```
options(encoding="utf-8")

knitr::opts_chunk$set(echo = TRUE,
                      message = FALSE)
```

### 5.1.2 Loading libraries

We are going to do our analysis with the help of `tidyverse`<sup>5</sup> library, let's load it in.

```
library(tidyverse)
```

### 5.1.3 Downloading the data

We are doing conditional download, so that we don't need re-download every time we build a document.

```
fn_data <- "domestic_airline_performance.csv"
fn_notes <- "domestic_airline_performance_notes.txt"

if(!file.exists(fn_data)) {
  url_data <- "https://data.gov.au/data/dataset/29128ebd-dbaa-4ff5-8b86-d9f30de56452/r"
  url_notes <- "https://data.gov.au/data/dataset/29128ebd-dbaa-4ff5-8b86-d9f30de56452/r"

  download.file(url_data, fn_data)
  download.file(url_notes, fn_notes)
}

df <- read_csv(fn_data, quote = "")
df
```

```
## # A tibble: 80,083 x 14
##   Route Departing_Port Arriving_Port Airline Month Sectors_Schedul~
##   <chr> <chr>           <chr>         <chr>   <dbl>         <dbl>
```

---

<sup>5</sup><https://www.tidyverse.org/>

```
## 1 Adel~ Adelaide      Brisbane      All Ai~ 37987      155
## 2 Adel~ Adelaide      Canberra      All Ai~ 37987      75
## 3 Adel~ Adelaide      Gold Coast      All Ai~ 37987      40
## 4 Adel~ Adelaide      Melbourne      All Ai~ 37987      550
## 5 Adel~ Adelaide      Perth      All Ai~ 37987      191
## 6 Adel~ Adelaide      Sydney      All Ai~ 37987      486
## 7 Albu~ Albury      Sydney      All Ai~ 37987      168
## 8 Alic~ Alice Springs Sydney      All Ai~ 37987      63
## 9 All ~ All Ports      All Ports      All Ai~ 37987      31913
## 10 Bris~ Brisbane      Adelaide      All Ai~ 37987      155
## # ... with 80,073 more rows, and 8 more variables: Sectors_Flown <dbl>,
## #   Cancellations <dbl>, Departures_On_Time <dbl>, Arrivals_On_Time <dbl>,
## #   Departures_Delayed <dbl>, Arrivals_Delayed <dbl>, Year <dbl>,
## #   Month_Num <dbl>
```

## 5.2 Exploring the data

Let's explore our data set. It is always helpful to get more information about the data set, good to start with getting dimensions of the `data.frame`, i.e number of rows and columns. Let's include the following bit of code into our Rmarkdown document. Note that instead of executing and showing the code we are storing results in a variable `d`, and for that we are using `echo = FALSE` chunk option.

```
```{r echo = F}
d <- df %>% dim
```
```

Later in the text we will be able to access variable as you would in R

```
`r d[1]`
```

Lets add the following sentence to our Rmarkdown document and then `knit` to see the results.

```
total number of observation `r d[1]` and total number of variables `r d[2]`
```

Now we are going to find out names of all airlines presented in the data set and number of observation for each airline. In this case we are not interested in showing actual code, so we are going to hide it with `echo = FALSE` once again.

```
```{r echo = F}
df %>%
```

```

  group_by(Airline) %>%
  summarise(n = n()) %>%
  arrange(-n)
```

```

I hope you have noticed “All Airlines” name in the `Airline` column. I am not fairly with such airlines. This is likely some summary field that we don’t know about. In the real life you should consult people who has generated the data set, but in our case we are simply going to filter those observations out. Once again we are hiding the results from the final document, by setting `eval = TRUE` to make sure that the code runs since we will need `df2` later in the document.

```

```{r echo = F, eval = T}
df2 <- df %>% filter(Airline != 'All Airlines')
```

```

### 5.3 Including external files

- `child` chunk option allows us to include external files into our document

You have probably noticed that we have downloaded two files, the data set and the notes about the data set. I didn’t want to spend time going over those notes, but let’s include them into our Rmarkdown document for future references.

Let’s add the following text to our document

```

### Additional information about the data set

```{r child = 'domestic_airline_performance_notes.txt'}

```

***

```

### 5.4 Challenge: More Rmarkdown 1

5 minutes

1. Can you summarise routes in similar way as we did with airlines? use `group_by(Route)`
2. Can spot an odd route in your summary? If you can filter it out from `df2`. `filter(Route != "All Ports-All Ports")`

## 5.5 Visualising the data

Our document looks pretty good so far, let's add some visualisation to our document, with that will be covering these chunk options the following chunk options, all to do with figures manipulation.

- `fig.align` - left, right, center or default (left)
- `fig.height` - height specified in inches
- `fig.width` - width specified in inches
- `fig.cap` - string of text in quotes

Firstly lets make sure we have our data properly filtered. We are going to filter out `All Ports-All ports` routes, since this is similar to `All airlines` field and likely to be some summary field that we are not interested in. We also going to only look at two airlines, Jetstar and Qantas, due to time constrains. Here we don't need to set any particular chunk options because I think it would be informative to show our filtering and we actually need that code to be run.

```
```{r}
df2 <- df %>% filter(Airline == 'Jetstar' | Airline == 'Qantas')
               Route != 'All Ports-All Ports')
```
```

Here we are summarising our data so that we have an idea of how many times a particular location had be used by our airlines per year. Let's include that bit code into our Rmarkdown document and once again let's hide our code from the document by setting `echo = FALSE`

```
```{r echo = FALSE}
df2 %>%
  group_by(Airline, Year, Departing_Port) %>%
  summarise(n = n()) %>%
  ungroup %>%
  ggplot(aes(Departing_Port, n, color = Airline)) +
  geom_boxplot() +
  theme(axis.text.x=element_text(angle=45, hjust=1))
```
```

Let's experiment with setting different dimensions to our figure. Lets set both height and width to 4. Remember that units for height and width are in inches.

```
```{r echo = FALSE, fig.height = 4, fig.width = 4}
df2 %>%
```

```

group_by(Airline, Year, Departing_Port) %>%
summarise(n = n()) %>%
ungroup %>%
  ggplot(aes(Departing_Port, n, color = Airline)) +
  geom_boxplot() +
  theme(axis.text.x=element_text(angle=45, hjust=1))
...

```

Now let's try to align our figure to the center by setting `fig.align = 'center'` and re-build our document.

Let's experiment with setting width to 15 and height to 9. At some point though we are going to start hitting the physical limit of the html page.

## 5.6 Challenge: More Rmarkdown 2

5 minutes

1. Can you align figure to the right?? `fig.align = 'right'`
2. Align figure to the center and add figure legend using `fit.cap` chunk option `fig.align = 'center', fig.cap = 'Figure 1: blah'`
3. Can you add some emphasis to figure legend, e.g make important parts bold or underlined? Remember that figure legend is just a string of text and any text can be marked

## 5.7 More plots

Let's attempt to see what is the distribution of cancellation in any given year

Note the **warning** message that comes up in the text, let's assume we understand it and let's just turn it off by setting `warning = F`

```

```{r, fig.width = 14, fig.height = 9}
df2 %>%
  filter(Airline == 'Jetstar' | Airline == 'Qantas') %>%
  select(Airline, Departing_Port, Cancellations, Year) %>%
  ggplot(aes(Departing_Port, Cancellations, color = factor(Year))) +
  geom_boxplot() +
  facet_wrap(~Airline) +
  theme(axis.text.x=element_text(angle= 45, hjust=1))
...

```

## 5.8 More chunk options

I'm going to share a couple of more code chunks, these are mainly cosmetic, some of you may never use them.

- `prompt=FALSE` i.e mimic *console*
- `comment=` remove hash symbol at the front of the output

For this example I'm going to use simple `for` loop. We are going to use this variable `sentence <- c("Let", "the", "computer", "do", "the", "work")`

```
```{r}
sentence <- c('Let', 'the', 'computer', 'do', 'the', 'work')

for(word in sentence){
  print(word)
}
```
```

```
sentence <- c("Let", "the", "computer", "do", "the", "work")

for(word in sentence){
  print(word)
}
```

```
## [1] "Let"
## [1] "the"
## [1] "computer"
## [1] "do"
## [1] "the"
## [1] "work"
```

Let's add `prompt=TRUE`

```
> sentence <- c("Let", "the", "computer", "do", "the", "work")
>
> for(word in sentence){
+   print(word)
+ }
```

```
## [1] "Let"
## [1] "the"
## [1] "computer"
## [1] "do"
## [1] "the"
## [1] "work"
```





## Chapter 6

# YAML introduction

As it was mentioned earlier in the book yaml is a stand along language, often it is used as a configuration file, which is true in the case of Rmarkdown. We are going to use it in conjunction with Rmarkdown documents by embedding yaml blob into Rmarkdown files, just like we did with R chunks. YAML blob, or in the context of Rmarkdown YAML header, must be at the very top of your Rmarkdown file. The yaml header enable high degree of customisation for our final documents. We can also use yaml header to “attach” or reference other external files such as bibliographies and styling in the form of css<sup>1</sup>.

For the purpose of configuring Rmarkdown documents you need to know three variable types:

- **scalar** stand along value e.g 3 or “car”
- **list** a collection of items e.g [“learing”, “to”, “use” “yaml”]
- **map** a different collection type that can hold simple types. e.g rmd\_files: [“00-index.Rmd”, “01-introduction.Rmd”]

### 6.1 YAML header

YAML is relatively similar to another file format JSON<sup>2</sup>, if you are familiar with one you should have little problem wrapping your head around the other. Fundamentally both file types trying to provide structured relationship between items via key = value pairing. Keys sometimes interchangeably used with tags. Remember that yaml language, unlike json, is very sensitive to spaces and indentations. Below are some examples of valid and invalid yaml syntax.

---

<sup>1</sup>[https://en.wikipedia.org/wiki/Cascading\\_Style\\_Sheets](https://en.wikipedia.org/wiki/Cascading_Style_Sheets)

<sup>2</sup><https://en.wikipedia.org/wiki/JSON>

### 6.1.1 Example 1

This is a valid yaml header. In this exapmle we have a key `title` with scalar value `Learning Rmarkdown`

```
---
title: "Learning Rmarkdown"
---
```

### 6.1.2 Example 2

This is also valid YAML header. Here we have `rmd_files` key that has as it's value a list of items. In yaml there is two ways one can specify a list.

```
---
rmd_files:
  - 00-index.Rmd
  - 01-introduction.Rmd
---
```

And

This is an alternative way to specify a list.

```
---
rmd_files: ["00-index.Rmd", "01-introduction.Rmd"]
---
```

### 6.1.3 Example 3

This on the other hand isn't valid YAML header

```
---
rmd_files:
  00-index.Rmd
  01-introduction.Rmd
---
```

## 6.2 Challenge: YAML 1

5 minutes

1. Is this a valid YAML header?

```
----
title: "Hello world!"
author: Me!
---
```

Yes, everything looks good to me

2. What about this YAML header?

```
----
title: "Hello world!"
author: Me!
bookdown::gitbook:
  config:
    toc:
      collapse: subsection
---
```

Yes, this is highly neted, but still a completely valid yaml header

3. How do you get a list of all possible keys and values (discussion question) ?  
Read the docs (will need to expand this answer)

## 6.3 General yaml header

This handful of tags are general between different document types. Most other key, values are aimed at the specific document type. In the next few sections we will look at yamls keys specific for Rmarkdown, bookdown and pdf final files configuration.

```
---
title: 'Hello world'
author: 'Kirill'
date: '13 July 2016'
---
```

## 6.4 Challenge: YAML 2

5 minutes

3. Is this a valid yaml?

```

---
date: 21 July, 2019
---
```

It is certainly valid by Rmarkdown standards, but it may not be in other systems

## 6.5 Rmarkdown yaml header

Here we are starting to see another new key `output` with a value `html_document`

```

---
title: 'Hello world'
author: 'Kirill'
date: '13 July 2016'
output: html_document
---
```

These are some of the possible values that `output` can take

- `html_notebook` Interactive R Notebooks
- `html_document` HTML document w/ Bootstrap CSS
- `pdf_document` PDF document (via LaTeX template)
- `word_document` Microsoft Word document (docx)
- `odt_document` OpenDocument Text document
- `rtf_document` Rich Text Format document
- `md_document` Markdown document (various flavors)

Turns out that each one of those values is also a key that can take other values.

```

---
title: 'Hello world'
author: 'Kirill'
date: '13 July 2016'
output:
  html_document:
    toc: true
    toc_depth: 3
    number_sections: yes
---
```

Note that indentation is very important here as it reflects the relationship between key value pairs.

## 6.6 Rmarkdown rendering

As we have discussed in the introduction Rmarkdown is an ambiguous word. It could mean an rmarkdown R package<sup>3</sup> that converts or renders markdown into various document types. We can also be referring to an Rmarkdown document that we are writing. And we also could use it in a more generic sense referring to the ecosystem.

Here I'm going to specifically talk about Rmarkdown R package and the `render` function i.e `rmarkdown::render()`. `render` can take an option for output format. You can either specify the output format by directly giving it a function i.e

```
rmarkdown::render(output_format = "html_document")
```

Or pass that same information via yaml header. As you might have noted above, `html_document` itself has a bunch of options. There would be a way to pass them manually in R console, but it is much nice and more reproducible to pass them via yaml header.

The two way to figure out which options are available for `html_document` is to either google (an obvious one) or take a look at the help page for that function i.e

```
?rmarkdown::html_document
```

## 6.7 Challenge: YAML 3

5 minutes

1. Can you find in the help page which values `df_print` from `html_document` can take? run `?rmarkdown::html_document` in Rstudio console to open help page and search for `df_print`
2. Set `df_print` to a value that will give you paginated HTML table. `paged`

## 6.8 More Rmarkdown tags

Let's add more options to our yaml file and `knit` it and see what has changed.

---

<sup>3</sup><https://github.com/rstudio/rmarkdown>

```

---
title: 'Hello world'
author: 'Kirill'
date: '13 July 2016'
output:
  html_document:
    df_print: paged
    toc: true
    toc_float: true
    toc_collapsed: true
    toc_depth: 3
    number_sections: false
    code_folding: "hide"
    theme: sandstone
    highlight: espresso
---

```

As I have eluted earlier if you simply change `output: html_document` to `output: pdf_document` you are going to get pdf document instead. Also remember that all of those options that we gave to `html_document` are specific to that document type only, although some tags might have the same name in other document types e.g `toc` and `toc_depth` keys also exist in `pdf_document`. We are not going to spend time on building a pdf document. It is a more finicky to build because it relying on LaTeX engine and LaTeX can be very finicky. This is more relevant for more complex documents. This is why we recommend to firstly build html document and only once you have finished you analysis and start building your pdf documents.

The more interesting, in my view, document type is `ioslides_presentation`

## 6.9 Presentation slides

As I've mentioned in previous section, `output` has many options, one of which is `ioslides_presentation`. Let's comment `html_document` with all it's options out for now, add `output: ioslides_presentation` and re-compile out document

```

---
title: 'Hello world'
author: 'Kirill'
date: '13 July 2016'
output: ioslides_presentation
#output:
#  html_document:

```

```
# df_print: paged
# toc: true
# toc_float: true
# toc_collapsed: true
# toc_depth: 3
# number_sections: false
# code_folding: "hide"
# theme: sandstone
# highlight: espresso
---
```

As you might have guessed `##` symbol in the case of `ioslides_presentation` means the beginning of the slide. While amount of work is minimal to convert between `html_document` and `ioslides_presentation` you will obviously need to reduce amount of text.





## Part III

## Part



In this section we are going to cover two types of referencing; cross-referencing tables, figures and other text and sections through out the document and citation i.e referencing external resources. Cross referencing internal section is relatively straight forward we just need to point to the resource using “speack” key, which will talk about shortly, whereas for referencing an external resource we need an additional bibliographies files that will hold citation information.



## Chapter 7

# Bibliographies

We have already talked about yaml files format being a plain text and structured file format. I've also mentioned json in passing, as being another plain text and structured file format. One of the main purposes for having structure is so that computer can understand (parse) the information. bibtex<sup>1</sup> is yet another plain text, but structured file format, often times referred to as bibliographical database file. Bibtex originated in 1985, here is an interview with the author, Oren Patashnik, of bibtex if you are interested to know how it came to be<sup>2</sup>. Whereas both yaml and json originated start of 2000's, 15 years later. The reason I am mentioning the dates is because in theory any one of those other formats, yaml or json, could have been easily re-purposed for citations. For example Citation File Format (CFF)<sup>3</sup> is in fact, exactly that, yaml based, citation format. There are many different citation file formats (10-20). Rmarkdown once again leverages an external tool pandoc-citeproc<sup>4</sup> to generate and embed citation. pandoc-citeproc<sup>5</sup> can work with several different file formats including bibtex<sup>6</sup>, RIS<sup>7</sup> and EndNote<sup>8</sup>. Hopefully this gives you a bit of an overview what is possible and available regarding citations. In this workshop we are going to use bibtex<sup>9</sup> file format only. Note that very common file extension for bibtex<sup>10</sup> is .bib and this is the one we are going to use. Let's have a look at a typical .bib file content, the one shown below has two citation entries.

@Manual{R-base,

---

<sup>1</sup><http://www.bibtex.org/>

<sup>2</sup><https://tug.org/interviews/patashnik.html>

<sup>3</sup><https://citation-file-format.github.io/>

<sup>4</sup><http://hackage.haskell.org/package/pandoc-citeproc>

<sup>5</sup><http://hackage.haskell.org/package/pandoc-citeproc>

<sup>6</sup><http://www.bibtex.org/>

<sup>7</sup>[https://en.wikipedia.org/wiki/RIS\\_\(file\\_format\)](https://en.wikipedia.org/wiki/RIS_(file_format))

<sup>8</sup><https://en.wikipedia.org/wiki/EndNote>

<sup>9</sup><http://www.bibtex.org/>

<sup>10</sup><http://www.bibtex.org/>

```

    title = {R: A Language and Environment for Statistical
      Computing},
    author = {{R Core Team}},
    organization = {R Foundation for Statistical Computing},
    address = {Vienna, Austria},
    year = {2017},
    url = {https://www.R-project.org/},
  }

@book{xie_allaire_grolemund_2019,
  place={Boca Raton},
  title={R Markdown: the definitive guide},
  publisher={CRC Press, Taylor & Francis Group},
  author={Xie, Yihui and Allaire, J. J. and Grolemund, Garrett},
  year={2019}
}

```

There are three core parts to any citation in the `.bib` file:

- **type** of the citation. Type begins with an `@` sign
- **key** used in our document to include citation. First item inside curly brackets
- **field** provide information about the thing that you are citing. Fields are key, value pairs

One thing to note about `.bib` file it is case-insensitive i.e `book`, `Book` and `BOOK` have the same meaning and effect.

## 7.1 Challenge: Bibliographies 1

5 minutes

1. Can you identify types of references shown in above? There are two citation with two different types `manual` and `book`
2. Can you identify keys for the references shown above? There are two citation with two unique key each, `R-base` and `xie_allaire_grolemund_2019`
3. Can you identify at least two different fields in any of the citations? Everything that has an equals sign is a fields.

## 7.2 Where do you get bibtex file?

There are two ways to get `.bib` files:

- manually curate one: remember that this is a plain text file format, so you can just type it out in a text editor and save as `.bib` file
- export out of your citation management or the publication website

I tried a couple of website, pubmed<sup>11</sup> and nature.com<sup>12</sup>, neither of those appear to allow you to export `.bib`. Pubmed exports `.nbib`, which is a different file format if you look inside. Nature exports `.ris`, again not the one that we want. Google scholar<sup>13</sup> has a button **import into Bibtext** that will give the correct citation.

As I've mentioned above all of those file formats are actually supported<sup>14</sup> the only problem is figuring out which “key” you can use to include your citation into the document. And there isn't much resource out there to help you with other bibliography file formats. For now I would say the best and easiest option is to stick with `.bib` format.

Let's practice including citation into our Rmarkdown document. This is the paper that we are going to cite *Excuse me, do you have a moment to talk about version control?*. Go to this URL <https://peerj.com/preprints/3159/>, look for “Download” button on the right hand side, from the drop down select “BibTex”. This will download citation file. On my computer the file name was `peerj-preprints-3159.bib`.

If you are curious to take a peek at the file content on your local computer, you can open such file with a text editor. Do not attempt to open with any other programs, such as MS Word or citation management tools. Most likely your computer will want to do just that, do not succumb! Mac people can use “TextMate” and windows people can use “Notepad” text editors. But this isn't necessary.

Once you have `.bib` file, let's upload it into `rstudio.cloud`. Navigate to your “Files” panel, there you should see “Upload” button. Use that menu to upload your `.bib` file onto `rstudio.cloud`. You should see `.bib` file in your file browser if you are successful. If you double click on that file it should open up in a different panel, text editor panel, and you should see the content of that file as shown below.

```
@article{10.7287/peerj.preprints.3159v2,
  title = {Excuse me, do you have a moment to talk about version control?},
  author = {Bryan, Jennifer},
  year = 2017,
  month = aug,
  keywords = {Git, GitHub, workflow, data science, R Markdown, reproducibility, R language},
```

---

<sup>11</sup><https://www.ncbi.nlm.nih.gov/pubmed/>

<sup>12</sup><https://www.nature.com>

<sup>13</sup><https://scholar.google.com.au/>

<sup>14</sup><https://github.com/jgm/pandoc-citeproc/blob/master/man/pandoc-citeproc.1.md>

```

abstract = {
  Data analysis, statistical research, and teaching statistics have at least one
},
volume = 5,
pages = {e3159v2},
journal = {PeerJ Preprints},
issn = {2167-9843},
url = {https://doi.org/10.7287/peerj.preprints.3159v2},
doi = {10.7287/peerj.preprints.3159v2}
}

```

I hope every can identify “key” for this citation - 10.7287/peerj.preprints.3159v2. To me this is very annoying key to use since it is not very memorable and hard to type. Let’s edit this file in place and change that key to Bryan2017. Remember that key has to be unique per .bib file, but they can be any text. Make sure you save your changes (ctrl+S) and you can close this file now.

Let’s include a reference to this .bib file in our Rmarkdown document via yaml header, using bibliography key.

```

---
bibliography: "peerj-preprints-3159.bib"
---

```

Now let’s use our article key to cite in the text [Bryan2017] and re-compile our html document.

## 7.3 Challenge: Bibliographies 2

5 minutes

1. Go to google scholar<sup>15</sup> and search for that same article *Excuse me, do you have a moment to talk about version control?*, find and export .bib citation and include it into our Rmarkdown document. Relatively hard task since I haven’t explained how to include multiple .bib files into yaml header.
2. If you are manually curating .bib file, how do you know which types and fields are allowed? This resource can be useful

## 7.4 More about .bib and Rmarkdown

As was mentioned above one can append multiple references into a single .bib file or you can provide a list of .bib file

---

<sup>15</sup><https://scholar.google.com.au/>



```
---  
bibliography: ["peerj-preprints-3159.bib", "another_reference.bib"]  
---
```

OR

```
---  
bibliography:  
- "peerj-preprints-3159.bib"  
- "another_reference.bib"  
---
```

If you want to reference multiple articles in the text each key should be separated by a semicolon (;)

```
[@Bryan2017; @bryan2018excuse]
```

You can include any text inside square brackets

```
[see @Bryan2017 p 12; also this ref @bryan2018excuse]
```

If you would like to suppress author's name you can use minus sign

```
[-@Bryan2017; -@bryan2018excuse]
```

You can also enable hyperlinking of the citation to the corresponding entry in the references as follows

```
---  
link-citations: true  
---
```

## 7.5 Citing R packages

R provides convenient `citation()` function that one can use to cite R packages e.g

```
citation("ggplot2")
```

## 7.6 Challenge: Bibliographies 3

2 minutes

1. Can you get `.bib` citation for `bookdown` package? You don't get `.bib` text content right away, but if you are careful at reading the message you will understand that you need to do this

```
citation("bookdown") %>% print(bibtex = TRUE)
```

## Chapter 8

# Bookdown

All `.Rmd` files located in the same directory will be compiled into the book in the (alphabetical?) order.

- files that start with an underscore are skipped
- if there is an `index.Rmd` it will always be treated as a first file
- those settings can be overwritten via `_bookdown.yml`
- `_bookdown.yml` must co-exist with `.Rmd` files in the “book” directory

Bookdown has extended markdown even further for math <https://bookdown.org/yihui/bookdown/markdown-extensions-by-bookdown.html#tab:theorem-envs>

### 8.1 work in progress

Besides these `html_document()` options, `gitbook()` has three other arguments:

- `split_by` argument specifies how you want to split the HTML output into multiple pages
  - `rmd`: use the base filenames of the input Rmd files to create the HTML filenames, e.g., generate `chapter3.html` for `chapter3.Rmd`.
  - `none`: do not split the HTML file (the book will be a single HTML file).
  - `chapter`: split the file by the first-level headers.
  - `section`: split the file by the second-level headers.

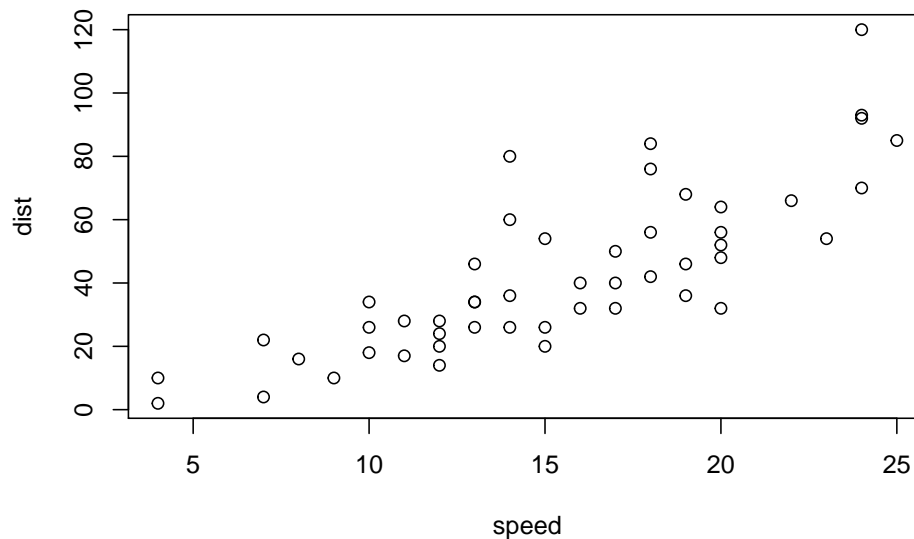


Figure 8.1: A scatterplot of the data `cars` using **base** R graphics.

– `chapter+number` and `section+number`: similar to `chapter` and `section`, but the files will be numbered.

- `split_bib`
- `config`
- `collapse`
  - `section`
  - `subsection`
  - `scroll_highlight`: yes before: null

## 8.2 Cross-references

A normal paragraph.

```
plot(cars) # a scatterplot
```

## 8.3 check

need to address difference between `html_document2` vs `gitbook`

<https://bookdown.org/yihui/rmarkdown/bookdown-output.html#bookdown-output>

## Chapter 9

# Miscellaneous

In general think about fast turn around time and ease of editing.  
this will remove numbering from that header

```
# Preface {-}
```

### 9.1 YAML

WE are using yaml language define certain parameters that meant to do to different tools

some are designated for pandoc other for bookdown package other general rmarkdown/knitr settings

### 9.2 LaTeX

$$f(k) = \binom{n}{k} p^k (1-p)^{n-k}$$

$$\begin{array}{ccc} x_{11} & x_{12} & x_{13} \\ x_{21} & x_{22} & x_{23} \end{array}$$

$$X = \begin{bmatrix} 1 & x_1 \\ 1 & x_2 \\ 1 & x_3 \end{bmatrix}$$

### 9.3 Tabbed sections

```
## Quarterly Results {.tabset}

### By Product

(tab content)

### By Region

(tab content)

## Quarterly Results {.tabset .tabset-fade .tabset-pills}
```

### 9.4 Figure options via yaml

This sounds interesting

ok, I've tested out and `fig_height` and `width` via `yaml` do the same thing as when passed through chunk options. I guess `yaml` allows global definition, although one can set chunk options globally too..

also need to cover `out.width = "70%"`

pretty good resource about image resizing [https://sebastiansauer.github.io/figure\\_sizing\\_knitr/](https://sebastiansauer.github.io/figure_sizing_knitr/)

### 9.5 tables Rmarkdown

can't really describe at this stage where this is come from. it appears that it has links with `pagedown` and `paged.js` library

- `paged`

`max.print` The number of rows to print. `rows.print` The number of rows to display. `cols.print` The number of columns to display. `cols.min.print` The minimum number of columns to display. `pages.print` The number of pages to display under page navigation. `paged.print` When set to `FALSE` turns off paged tables. `rownames.print` When set to `FALSE` turns off row names.

## References







## Appendix A

# Appendix

### A.1 Long list of chunk options

| name           | value     | type            | description                                                                        |
|----------------|-----------|-----------------|------------------------------------------------------------------------------------|
| child          | NULL      | code_evaluation | A character vector of filenames. Knitr will knit the files in the order specified. |
| code           | NULL      | code_evaluation | Set to R code. Knitr will replace the code in the chunk with the code specified.   |
| engine         | 'R'       | code_evaluation | Knitr will evaluate the chunk in the named language.                               |
| echo           | TRUE      | results         | If FALSE, knitr will not display the code in the chunk.                            |
| eval           | TRUE      | code_evaluation | If FALSE, knitr will not run the code in the code chunk.                           |
| include        | TRUE      | code_evaluation | If FALSE, knitr will run the chunk but not include the results.                    |
| purl           | TRUE      | code_evaluation | If FALSE, knitr will not include the chunk when running the document.              |
| collapse       | FALSE     | results         | If TRUE, knitr will collapse all the source and output into a single line.         |
| results        | 'markup'  | results         | If 'hide', knitr will not display the code's results in the document.              |
| error          | TRUE      | results         | If FALSE, knitr will not display any error messages.                               |
| message        | TRUE      | results         | If FALSE, knitr will not display any messages generated by the chunk.              |
| warning        | TRUE      | results         | If FALSE, knitr will not display any warning messages.                             |
| comment        | '##'      | code_decoration | A character string. Knitr will append the string to the end of each line of code.  |
| highlight      | TRUE      | code_decoration | If TRUE, knitr will highlight the source code in the document.                     |
| prompt         | FALSE     | code_decoration | If TRUE, knitr will add > to the start of each line of code.                       |
| strip.white    | TRUE      | code_decoration | If TRUE, knitr will remove white spaces that appear at the start of each line.     |
| tidy           | FALSE     | code_decoration | If TRUE, knitr will tidy code chunks for display with the pretty() function.       |
| opts.label     | NULL      | chunks          | The label of options set in knitr::opts_template() to use with the chunk.          |
| R.options      | NULL      | chunks          | Local R options to use with the chunk. Options are passed to the R process.        |
| ref.label      | NULL      | chunks          | A character vector of labels of the chunks from which to pull references.          |
| autodep        | FALSE     | cache           | If TRUE, knitr will attempt to figure out dependencies between chunks.             |
| cache          | FALSE     | cache           | If TRUE, knitr will cache the results to reuse in future runs.                     |
| cache.comments | NULL      | cache           | If FALSE, knitr will not rerun the chunk if only a comment has changed.            |
| cache.lazy     | TRUE      | cache           | If TRUE, knitr will use lazyload() to load objects in the cache.                   |
| cache.path     | 'cache/'  | cache           | cache.vars NULL A character vector of object names to cache.                       |
| dependson      | NULL      | cache           | A character vector of chunk labels to depend on.                                   |
| dev            | 'png'     | plots           | The R function name that will be used as a graphics device.                        |
| dev.args       | NULL      | plots           | Arguments to be passed to the device, e.g. dev.args=c('width=100', 'height=100').  |
| dpi            | 72        | plots           | A number for knitr to use as the dots per inch (dpi).                              |
| external       | TRUE      | plots           | If TRUE, knitr will externalize tikz graphics to save space.                       |
| fig.align      | 'default' | plots           | How to align graphics in the final document. One of 'left', 'center', 'right'.     |
| fig.cap        | NULL      | plots           | A character string to be used as a figure caption in the document.                 |
| fig.env        | 'figure'  | plots           | The Latex environment for figures.                                                 |
| fig.ext        | NULL      | plots           | The file extension for figure output, e.g. fig.ext='png'.                          |
| fig.height     | 7         | plots           | The height to use in R for plots created by the chunk.                             |

## A.2 Citation

### A.2.1 Yaml header

You can also include citation into yaml header e.g

```
references:
- id: fenner2012a
  title: One-click science marketing
  author:
  - family: Fenner
    given: Martin
  container-title: Nature Materials
  volume: 11
  URL: 'http://dx.doi.org/10.1038/nmat3283'
  DOI: 10.1038/nmat3283
  issue: 4
  publisher: Nature Publishing Group
  page: 261-263
  type: article-journal
  issued:
    year: 2012
    month: 3
```

While this is handy for one or two citation, but this isn't practical for a study that has more than a few citations.

### A.2.2 Changing citation style

Apparently if you go [here](https://github.com/citation-style-language/styles)<sup>1</sup> and download individual .csl files, specific for your citation style you then should be able to reference that file in yaml header

```
---
csl: "harvard-anglia-ruskin-university.csl"
---
```

OR

```
---
citation-style: "harvard-anglia-ruskin-university.csl"
---
```

---

<sup>1</sup><https://github.com/citation-style-language/styles>

This is explained here<sup>2</sup>

However I wasn't able to change my style. I suspect there are some subtleties between bookdown and rmarkdown specifically `html_document` and `html_document2` outputs

Here<sup>3</sup> meant to be the solution by using

```
---
pandoc_args: [--csl=../supplementary2/harvard-anglia-ruskin-university.csl]
---
```

But that also didn't work for me.

Also note that `biblio-style` “only applied to LaTeX output. For other output formats, you need to use the csl option in YAML or `-csl` in `pandoc_args`.”<sup>4</sup>

```
---
biblio-style: apalike
---
```

### A.2.3 BibTex

This is a good resource<sup>5</sup> for manual bibtex curation.

## A.3 Git and GitHub

A brief note about README files. It is regarded as a “silent” way of communication, where you can tell all necessary information another person need to know about your project. For a software tool you would put information about how to build that particular tool and dependencies. In our case we will add information how to build final html report. We will do this a bit later in the workshop.

---

<sup>2</sup><https://r4ds.had.co.nz/r-markdown.html#yaml-header>

<sup>3</sup><https://stackoverflow.com/questions/48965247/use-csl-file-for-pdf-output-in-bookdown>

<sup>4</sup><https://github.com/rstudio/bookdown/issues/354>

<sup>5</sup><http://bib-it.sourceforge.net/help/fieldsAndEntryTypes.php>