Lecture 2: R Markdown, Version Control with Git(Hub), and Other Productivity Tools

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*Parts of these slides are adapted from "Advanced Data Analytics" by Nick Hagerty and "Data Science for Economists" by Grant McDermott.

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Prologue

Prologue

Before we dive in, let's double check that we all have

- ☑ Installed R.
- ✓ Installed **RStudio**.
- ☑ Signed up for an account on Github
- ✓ Installed Git and Github Desktop
- ☑ Log into your Github account on Github Desktop

R Markdown

R Markdown

Before we dive into version control, let's chat about **R Markdown**.

R Markdown is a document type that allows for integration of R code and output into a Markdown document.

Resources:

- Website: rmarkdown.rstudio.com
- R Markdown Cheatsheet
- Book: R Markdown: The Definitive Guide (Yihui Xie, JJ Allaire, and Garrett Grolemund)

R Markdown

Before we dive into version control, let's chat about **R Markdown**.

R Markdown is a document type that allows for integration of R code and output into a Markdown document.

Other points:

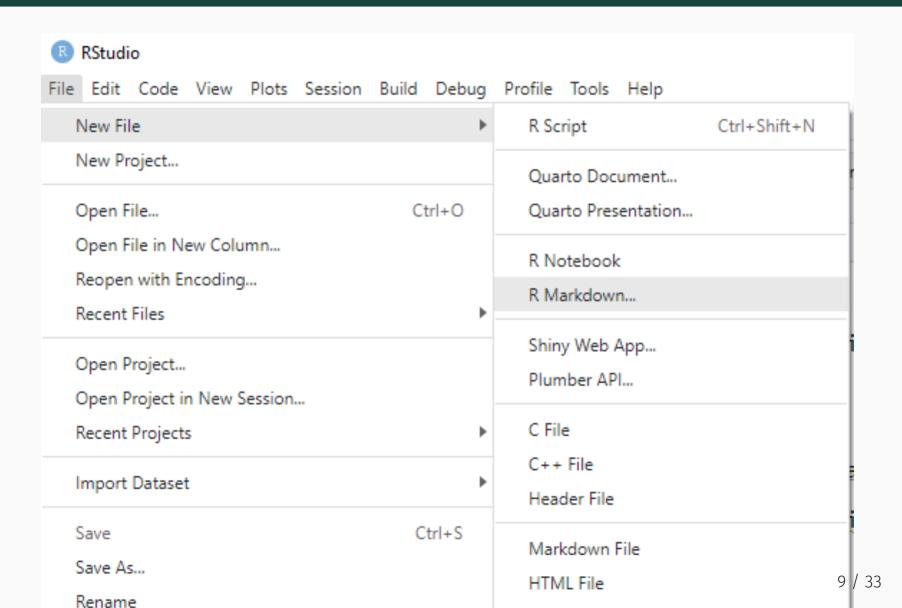
- We'll be completing assignments using R Markdown.
- FWIW, my lecture slides and notes are all written in R Markdown too. (E.g. This slide deck is built using the **xaringan** package with the metropolis theme.)

R Markdown: Getting Started

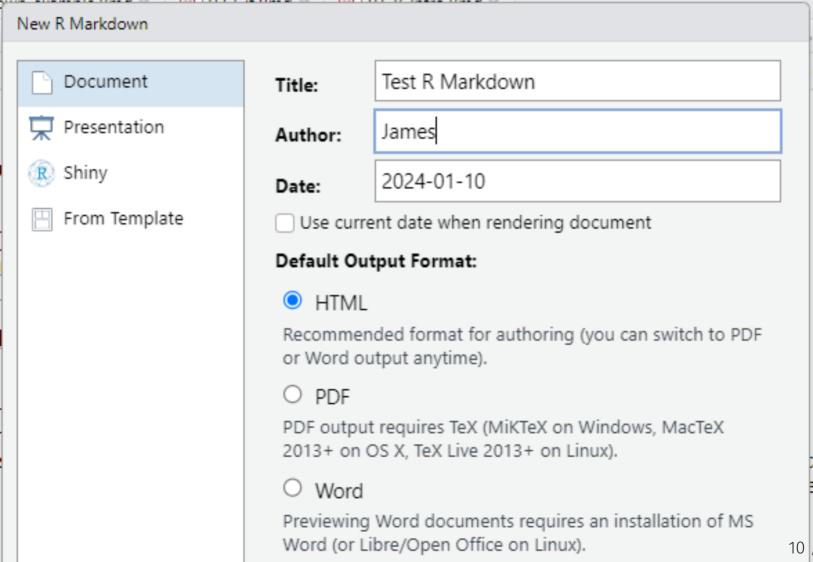
- ✓ Installed R.
 ✓ Installed RStudio.
 ✓ Add the rmarkdown package
 install.packages("rmarkdown")
- ☐ Install LaTeX
 - If just for this, can use **TinyTex**

```
# Install only if you don't have LaTeX already
install.packages("tinytex")
tinytex::install_tinytex()
```

R Markdown: Creating a New .Rmd File



R Markdown: Creating a New .Rmd File



R Markdown: Creating a New .Rmd File



R Markdown Components

R Markdown combines

- 1. Markdown: lightweight markup language
- 2. LaTeX: typesetting for math
- 3. R: include code and generate output

Let's do some practice: **open a new .Rmd file** and try adding content as we go

Markdown

Markdown allows for formatting text in a lightweight way

I highly recommend the handy Markdown Guide for more details

Markdown: Heading

Headings emphasize text and add chunks to your script

Largest headingwith one leading # (slide title above)

Second Largest (##)

Third Largest (###)

Getting Smaller... (####)

Normal Text for comparison

Markdown: Text Format

Bold text with **your text**

Italicize with *single asterisks*

Add code text with grave accents (the back tick symbol)

- •
- The other output of the tilde key ~ on keyboard

End a line with two spaces to start a new paragraph

• or leave a line space between sentences

Can also start a new line with backslash (\)

Markdown: Text Format

Add superscripts² with ^carets^

Add strikethroughs with ~~double tildes~~

Add a line break (horizontal rule)

with ***

Markdown: Text Format

Draw tables using | and -

Col A	Col B	Col C
This	is	a
Table		WOW

Markdown: Lists

Add an **ordered list** with **1.**

- 1. First Item
- 2. Second Item
- 3. No need to change the number keep using 1. It will automatically update.

Add an unordered list with * or -

- A thing
- Another related thing
 - Indent to nest
 - 1. Can mix ordered and unordered

Markdown: Inputs

Add a link with []()

- [text label](URL)
- Add direct link with <link> https://www.markdownguide.org

Add an image with

• ![alt text](URL)

practice by adding images/smile.png:



R Markdown: LaTeX

Another advantage of R Markdown is that it integrates ${}^{\text{LAT}}_{\text{EX}}$ functionality for typesetting math.

Add an inline equation with \$TeX\$

$$Var(X) = \sum\limits_{i=1}^n rac{(x_i - ar{x})^2}{n} \hspace{0.5cm} Y_{it} = eta_0 + eta_1 X_{it} + \epsilon_{it}$$

Add multiple rows of LaTeX with

\$\$

LaTeX lines here

\$\$

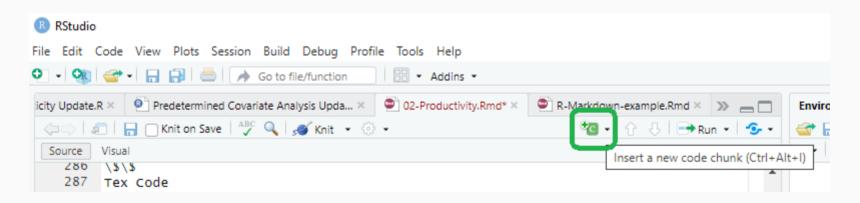
Use the **standard LaTeX commands** for symbols/characters

R Markdown: R Code

R code is primarily executed with **code chunks**

Add a chunk with

- Cmd + Option + I (Ctrl + Alt + I on PC)
- The Insert button in the UI
- Manually type



R Markdown: R Code Chunks

```
307

308 → ```{r}

309

310 ^ ```
```

Code chunks allow us to add as many lines of code as we want

- Output will appear underneath after executing the full chunk
- Can customize whether it runs, how output is displayed
- Can run manually
 - o Line by line with Cmd/Ctrl + Enter
 - Entire chunk with Run Entire Chunk button

R Markdown: R Code Chunk Options

You can **add chunk options** in brackets after r and separated by commas.

Some commonly-used options include:

- Chunk label (ex_chunk)
- include = FALSE will run the chunk but hide it from the final document
- eval = FALSE will display code without evaluating it
- results = 'hide' runs code but hides output from the final document

R Markdown: R Code Chunk Options

You can **add chunk options** after r and separated by commas.

Some commonly-used options include:

- echo = FALSE runs the code but hides the chunk from the final document
- error = FALSE (warning: FALSE) will hide error (warning) messages generated by the code
- LOTS of options for output figures: figure size (fig.width, fig.height, fig.dim), output document scale (out.width, out.height), alignment (fig.align), caption (fig.cap)

Learn more about chunk options here

R Markdown: R Code

You can call R objects from earlier chunks **inline** with

```
four = 2+2
```

This can output in line with text: 2 + 2 = 4

R Markdown File Organization

1. Header

RStudio automatically builds the R Markdown file from a template, which begins with a **header**

- Title
- Author
- Date
- Output Format

```
    Main options<sup>1</sup>: HTML
        (html_document), PDF
        (pdf_document), LaTeX
        (latex_document), or Word
        (word_document)
```

```
Source Visual

1 - ---
2 title: "Test RMD"
3 author: "James Sears"
4 date: "2024-01-11"
5 output: html_document
6 - ---
```

1: See **CH 3 of "R Markdown: The Definitive Guide" for more on how to customize output formats**

2. R Setup

By default, RStudio adds a **setup** code chunk next.

```
8 * ```{r setup, include=FALSE}
9 knitr::opts_chunk$set(echo = TRUE)
10 * ```
11
```

- Can set global options
- Useful as your preamble
- For R Notebooks, this will automatically be run and is the only place where you can change your working directory

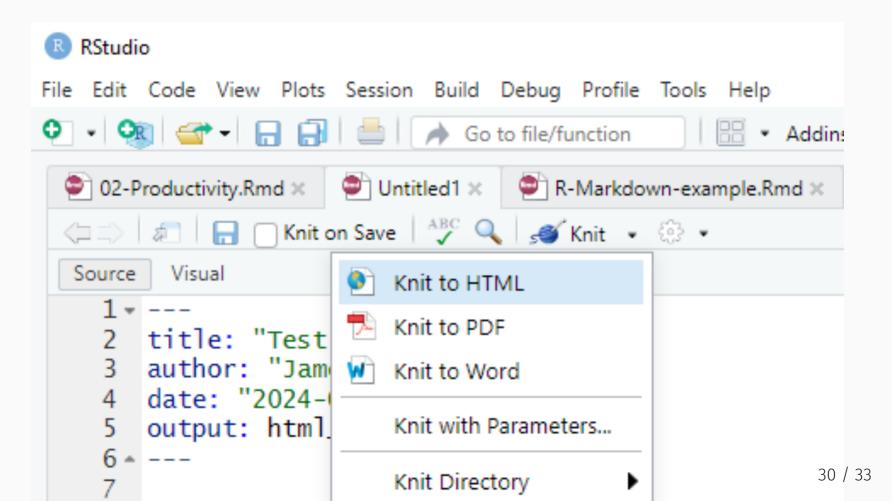
3. Contents

From here on you can build the report/notebook as needed for the task.

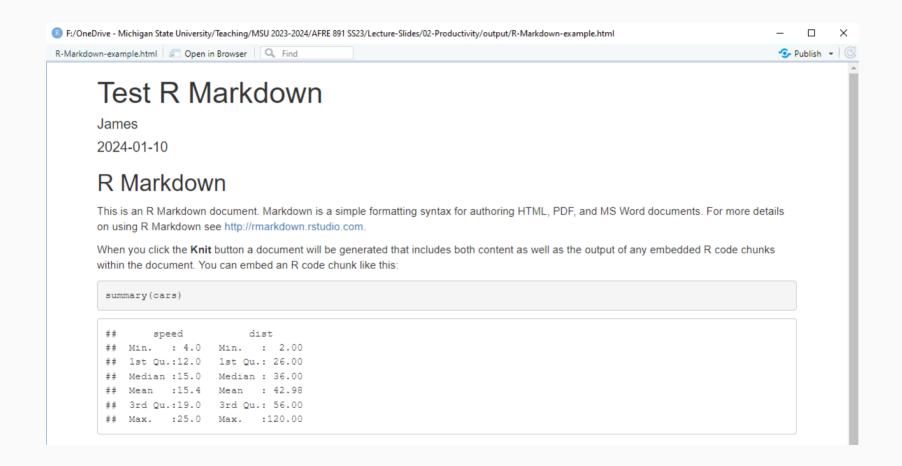
- Add any writing and outside graphics or bibTeX citations
- Add code chunks to carry out desired analysis
- Employ sections and formatting to structure the document as desired

Compiling/Knitting

When you are ready to compile your final document, use the Knit button or Ctrl/Cmd + Shift + K



R Markdown: Knit to Compile Output



Markdown Practice!

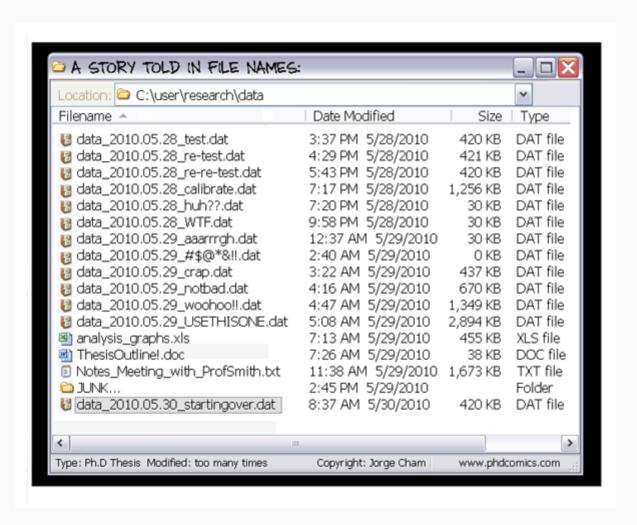
Markdown Practice

- 1. Create a new R Markdown file named "R-Markdown-Ex.RMD"
- 2. In the setup chunk, load the dslabs and tidyverse packages
 - Use the data() function to read in the divorce_margarine dataset
- 3. Add a header labeled "Correlation vs. Causation" and a text explanation below for why we often want to differentiate between the two
- 4. Add a code chunk with the label plot
 - Type the following code:

5. Knit and save a PDF/HTML copy of the file to the "output" folder

Version Control

Why Use Version Control



Goals of Version Control

While building project folders with the above naming conventions is *fun*, a good **version control system** can solve this problem.

- Save each set of changes sequentially
- Keep track of different versions of a file
- Merge changes from multiple versions/sources

Git(Hub) Solves this Problem

Git

- Git is a distributed version control system
 - Each team member has a local copy of files on their computer
- Imagine if Dropbox and the "Track changes" feature in MS Word had a baby. Git would be that baby.
- In fact, it's even better than that because Git is optimised for the things that economists and data scientists spend a lot of time working on (e.g. code).
- There is a learning curve, but I promise you it's worth it.

Git(Hub) Solves this Problem

GitHub

- It's important to realise that **Git** and **GitHub** are distinct things.
- **GitHub** is an **online hosting platform** that provides an array of services built on top of the Git system. (Similar platforms include Bitbucket and GitLab.)
- Just like we don't *need* Rstudio to run R code, we don't *need* GitHub to use Git... But it will make our lives so much easier.

Git(Hub) for Scientific Research

From software development...

- Git and GitHub's role in global software development is not in question.
- There's a high probability that your favourite app, program or package is built using Git-based tools. (RStudio is a case in point.)

... to scientific research

- Benefits of VC and collaboration tools aside, Git(Hub) helps to operationalise the ideals of open science and reproducibility.²
- Journals have increasingly strict requirements regarding reproducibility and data access. GH makes this easy (DOI integration, off-the-shelf licenses, etc.)
- I host **teaching materials** on GH. I even use it to host and maintain my **website**.

Git(Hub) and RStudio

Seamless Integration

One of the (many) great features of RStudio is how well it integrates version control into your everyday workflow.

- Even though Git is a completely separate program to R, they feel like part of the same "thing" in RStudio.
- This next section is about learning the basic Git(Hub) commands and the recipe for successful project integration with RStudio.

I also want to bookmark a general point that we'll revisit many times during this course:

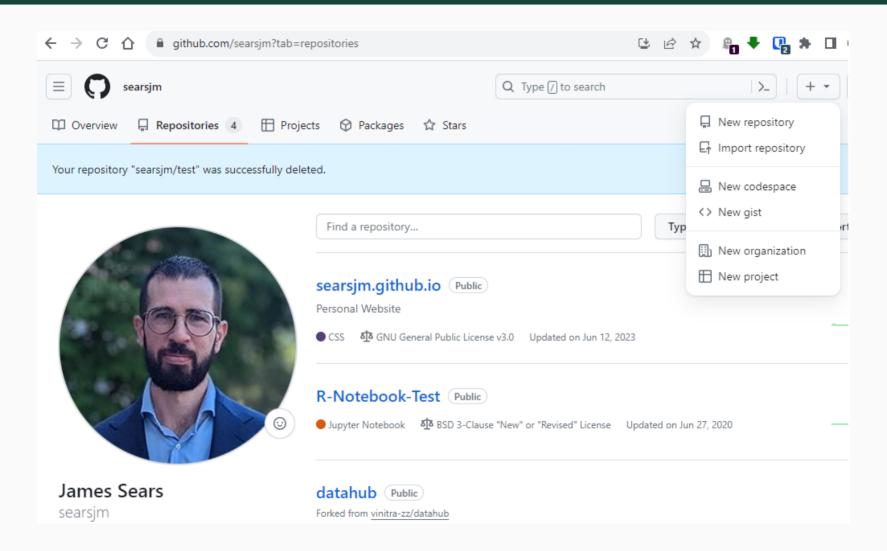
- The tools that we're using all form part of a coherent data science ecosystem.
- Greatly reduces the cognitive overhead ("aggregation") associated with traditional workflows, where you have to juggle multiple programs and languages at the same time.

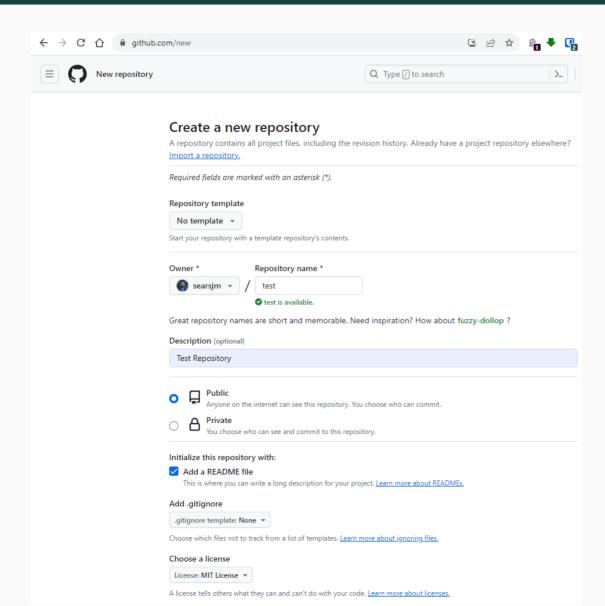
Link a GitHub Repo to an RStudio

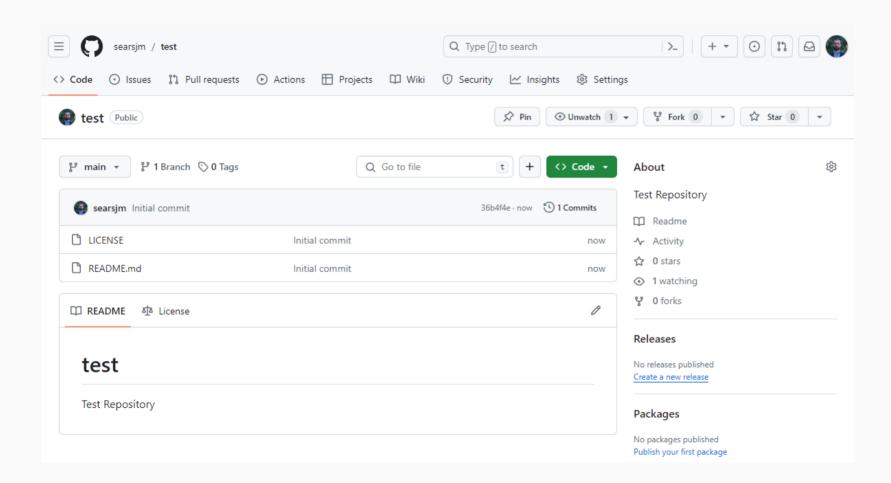
The starting point for our workflow is to link a GitHub repository (i.e. "repo") to an RStudio Project. Here are the steps we're going to follow:

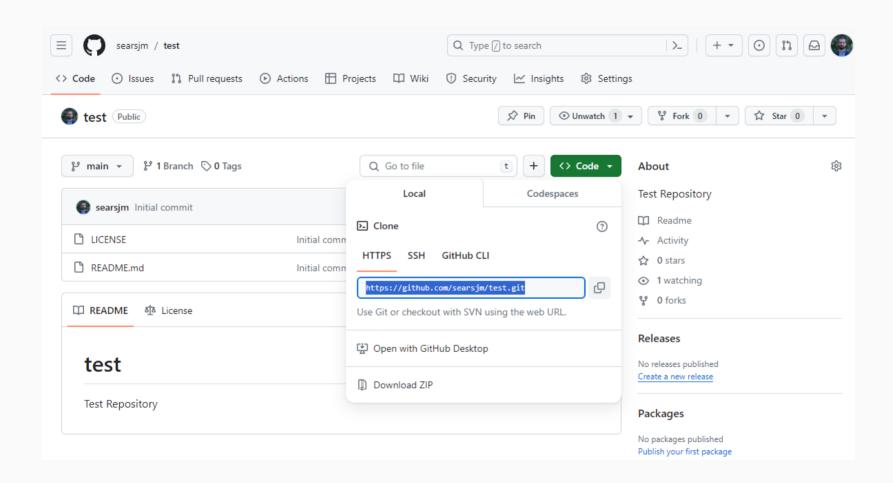
- 1. Create the repo on GitHub and initialize with a README.
- 2. Copy the HTTPS/SSH link (the green "Clone or Download" button).¹
- 3. Open up RStudio.
- 4. Navigate to File -> New Project -> Version Control -> Git.
- 5. Paste your copied link into the "Repository URL:" box.
- 6. Choose the project path ("Create project as subdirectory of:") and click **Create Project**.

Now, I want you to practice by these steps by creating your own repo on GitHub — call it "test" — and cloning it via an RStudio Project.

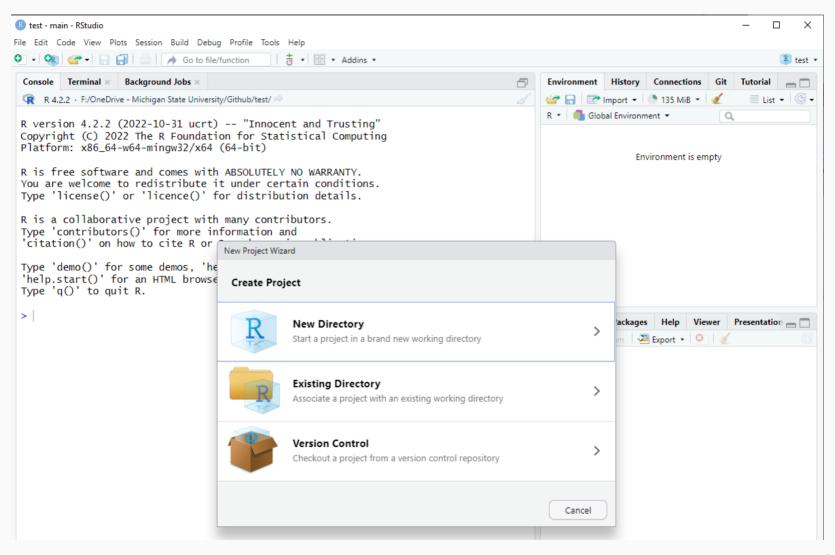




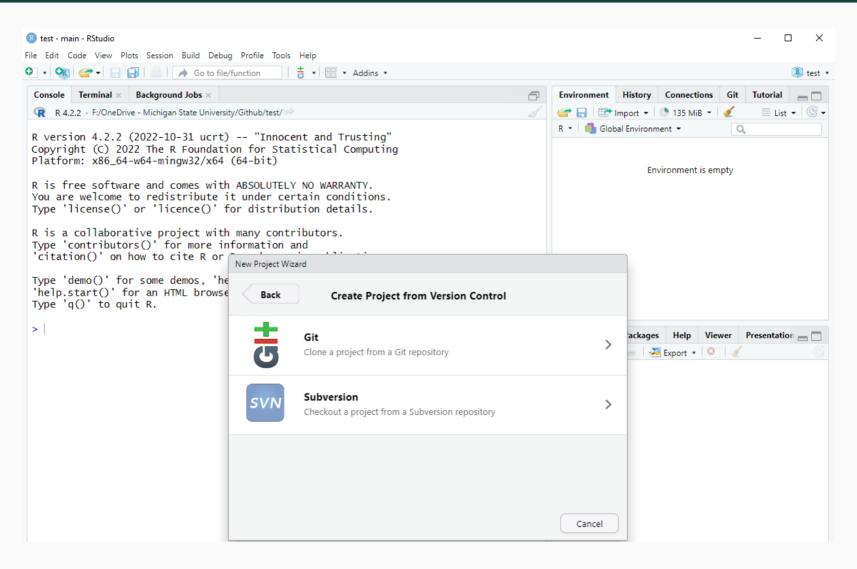




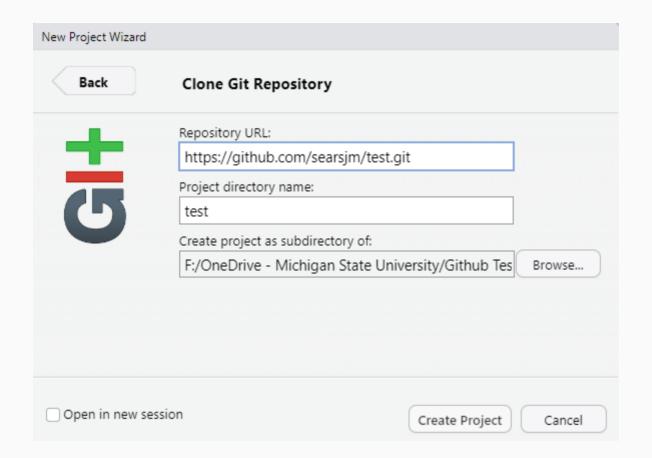
Copy Repo Link



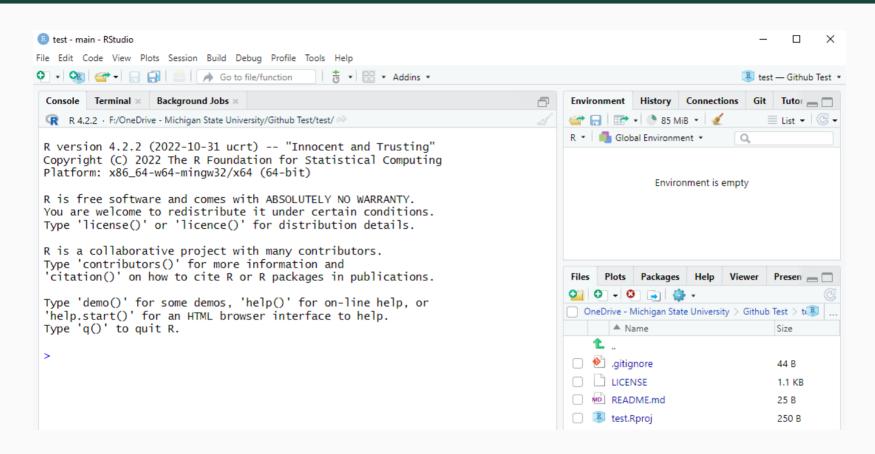
Add Repo into RStudio



Add Repo into RStudio



Add Repo into RStudio



Making Local Changes

Look at the **top-right panel** in your RStudio IDE. Do you see the **Git** tab?

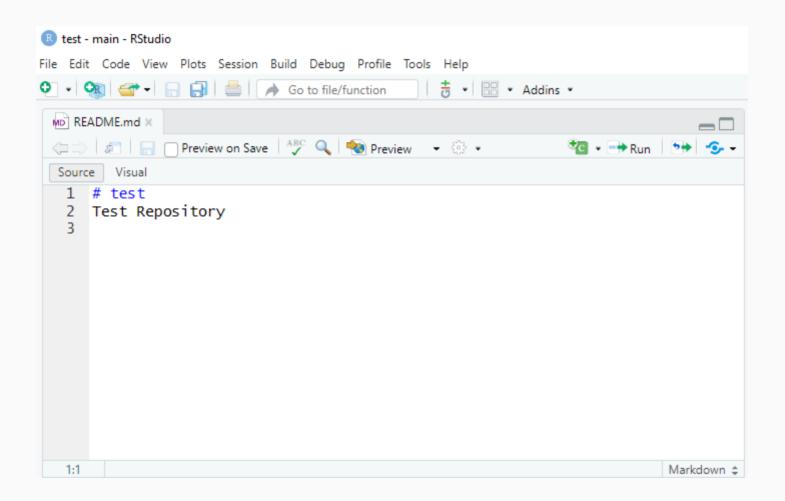
- Click on it.
- There should already be some files in there, which we'll ignore for the moment.¹

Now open up the README file (see the "Files" tab in the bottom-right panel).

- Add some text and save the README.
- Do you see any changes in the **Git** panel? Good. (Raise your hand if not.)

¹ They're important, but not for the purposes of this section.

Making Local Changes



Making Local Changes

```
R test - main - RStudio
File Edit Code View Plots Session Build Debug Profile Tools Help
MD README.md* ×
                                                    To - → Run 5+
 Source Visual
    # Test Repository
     This is a **test repository** to help us *figure out*
      1. How to use GitHub
      1. How to integrate it with RStudio Projects
  6
        What this is
                                    What this isn't
  8
       | A test of what we're learning | Everything GitHub can do |
  9:63
                                                              Markdown :
```

Main Git operations

Now that you've **cloned** your first repo and made some local changes, it's time to learn the **four main Git operations**.

1. Stage (or "add")

 Tell Git that you want to add changes to the repo history (file edits, additions, deletions, etc.)

2. Commit

 Tell Git that, yes, you are sure these changes should be part of the repo history.

3. Pull

 Get any new changes made on the GitHub repo (i.e. the upstream remote), either by your collaborators or you on another machine.

4. Push

Push any (committed) local changes to the GitHub repo

Main Git operations

1. Stage (or "add")

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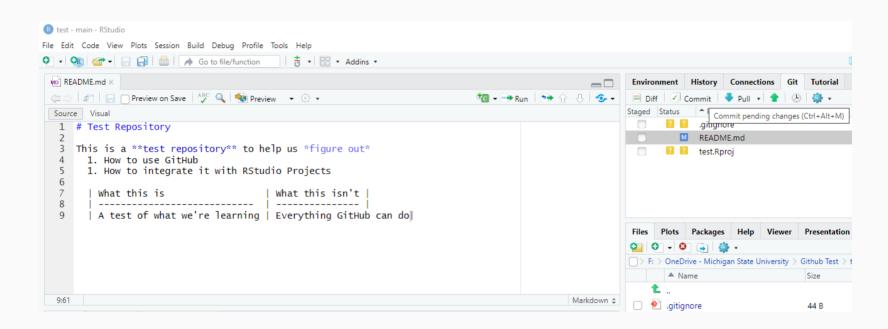
 Get any new changes made on the GitHub repo (i.e. the upstream remote), either by your collaborators or you on another machine.

4. Push

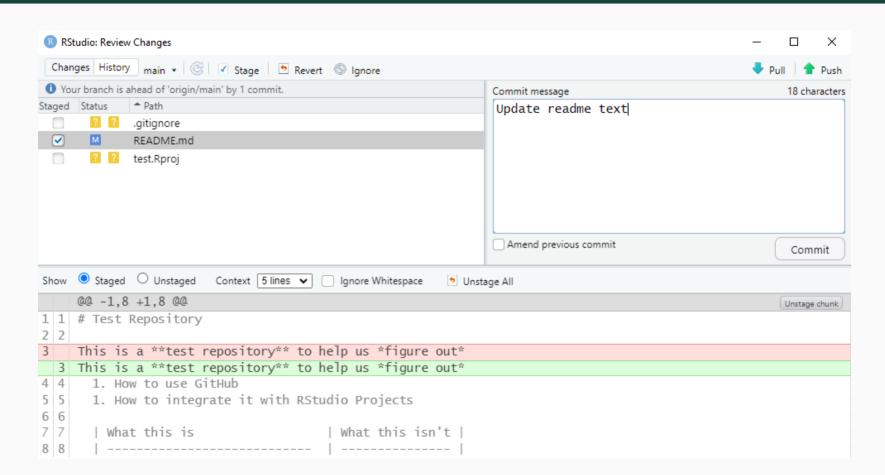
Push any (committed) local changes to the GitHub repo

For the moment, it will be useful to group the first two operations and last two operations together. (They are often combined in practice too, although you'll soon get a sense of when and why they should be split up.)

Stage and Commit



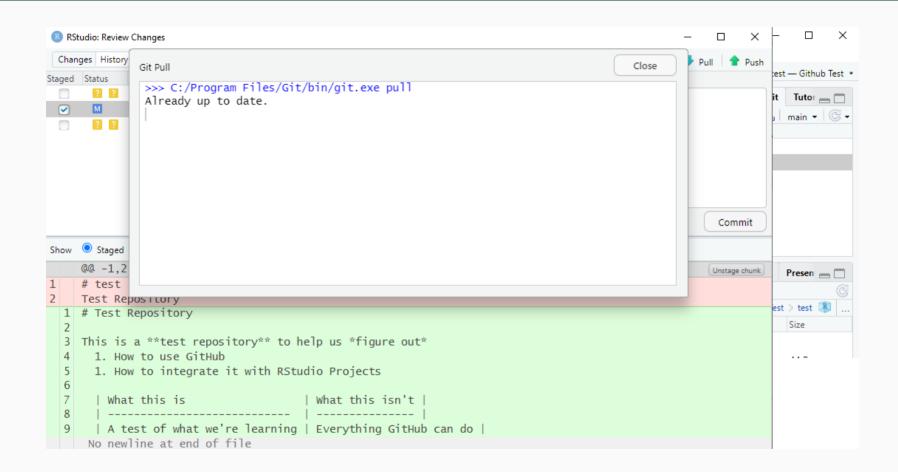
Stage and Commit



Stage and Commit

```
Close
Git Commit
>>> C:/Program Files/Git/bin/git.exe commit -F C:/Users/James/AppData/Local/Temp/F
 [main 50fe2dd] Update readme text
 1 file changed, 1 insertion(+), 1 deletion(-)
```

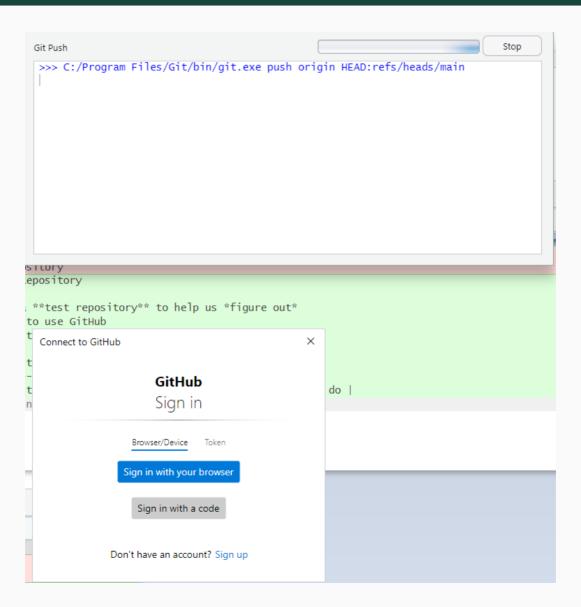
Pull



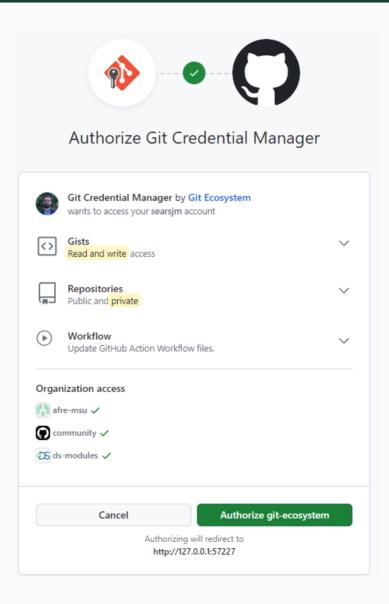
Push



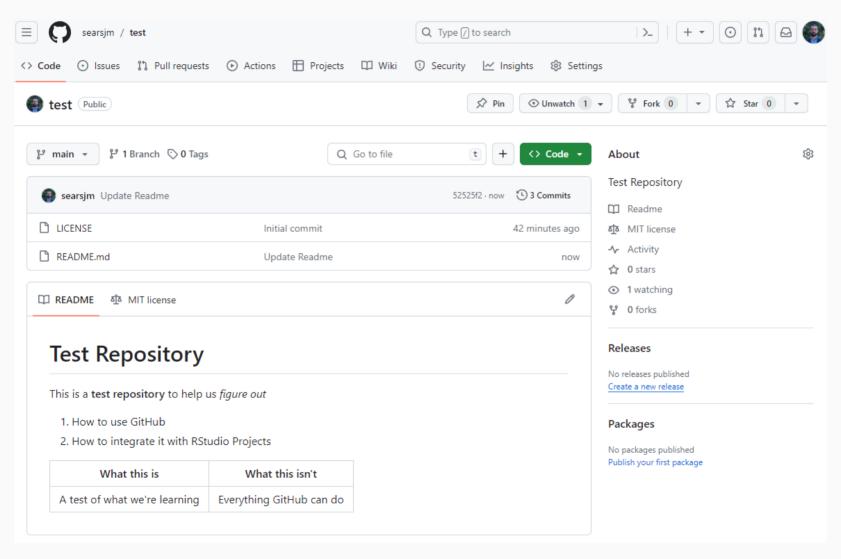
Sign RStudio into Github



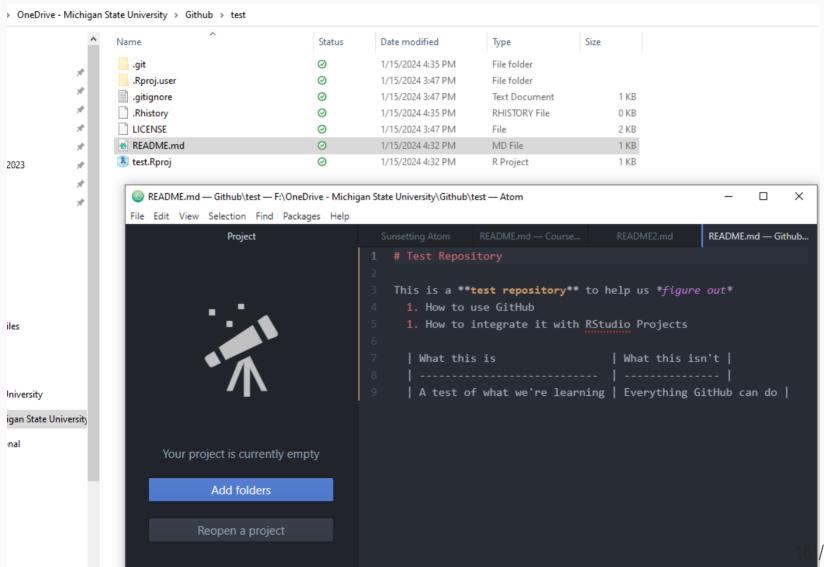
Sign RStudio into Github



Changes Now Visible on Github



Changes Now Visible Locally Too



Recap

Here's a step-by-step summary of what we just did.

- Made same changes to a file and saved them locally.
- Staged these local changes.
- Committed these local changes to our Git history with a helpful message.
- **Pulled** from the GitHub repo just in case anyone else made changes too (not expected here, but good practice).
- Pushed our changes to the GitHub repo.

Aside: Always pull from the upstream repo *before* you push any changes. Seriously, do this even on solo projects; making it a habit will save you headaches down the road.

Recap

Here's a step-by-step summary of what we just did.

- Made same changes to a file and saved them locally.
- Staged these local changes.
- Committed these local changes to our Git history with a helpful message.
- **Pulled** from the GitHub repo just in case anyone else made changes too (not expected here, but good practice).
- Pushed our changes to the GitHub repo.

PS — You were likely challenged for your GitHub credentials at some point. Learn how to cache these here.

Why this Workflow: GitHub

Creating the repo on GitHub first means that it will **always be "upstream"** of your (and any other) local copies.

- In effect, this allows GitHub to act as the central node in the distributed
 VC network.
- Especially valuable when you are collaborating on a project with others

 more on this later but also has advantages when you are working alone.
- If you would like to move an existing project to GitHub, my advice is still to create an empty repo there first, clone it locally, and then copy all your files across.

Why this Workflow: RStudio

RStudio Projects are great.

- They interact seamlessly with Git(Hub), as we've just seen.
- They also solve absolute vs. relative path problems, since the .Rproj file acts as an anchor point for all other files in the repo.¹

¹ Calling files from their full YourComputer/YourName/Documents/Special-Subfolder/etc paths in your scripts is the enemy of reproducibility!

GitHub Desktop

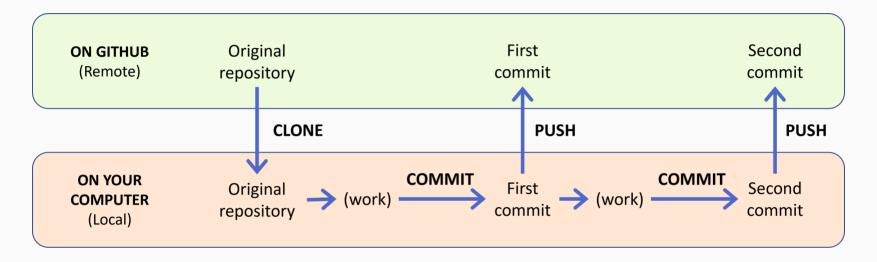
Version Control with GitHub Desktop

Although GitHub integration with RStudio has lots of functionality, there are times where we want to keep track of files and projects **outside of RStudio**.

This is where **GitHub Desktop** comes in.

Github Desktop Workflow

With GitHub Desktop, we can maintain a similar workflow

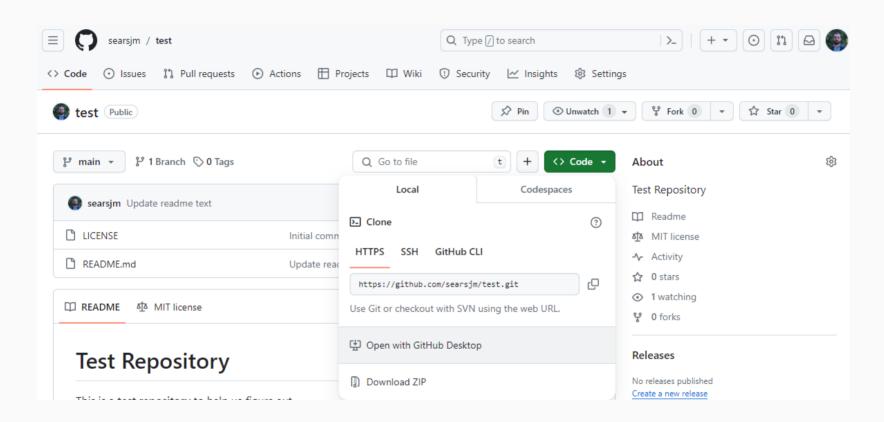


Github Desktop Workflow

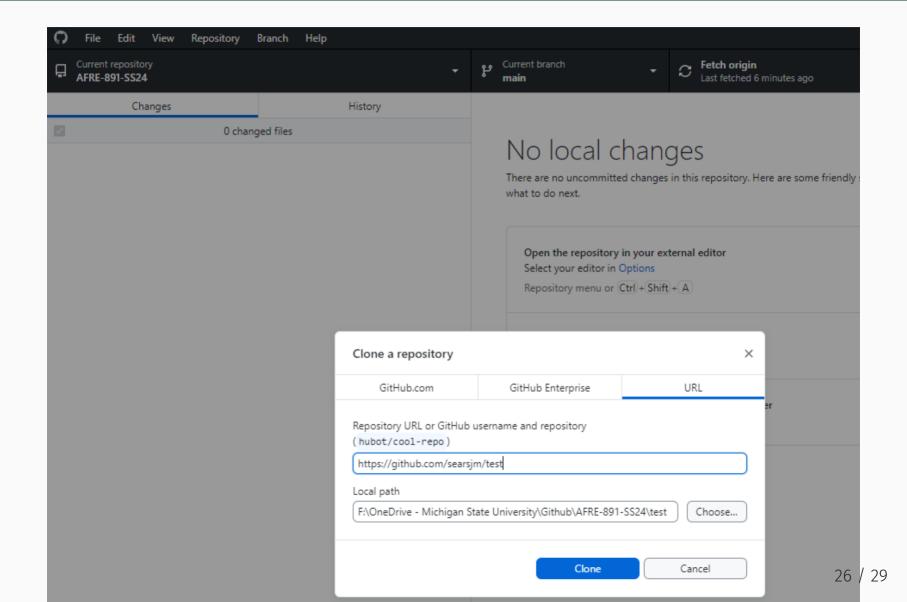
With GitHub Desktop, we can maintain a similar workflow

- 1. Create a new repository on GitHub.com
- 2. **Clone** the repository to your local machine
- 3. Do some work (i.e. edit the repository)
- 4. **Commit** changes to the repository
- 5. **Push** your commit to GitHub

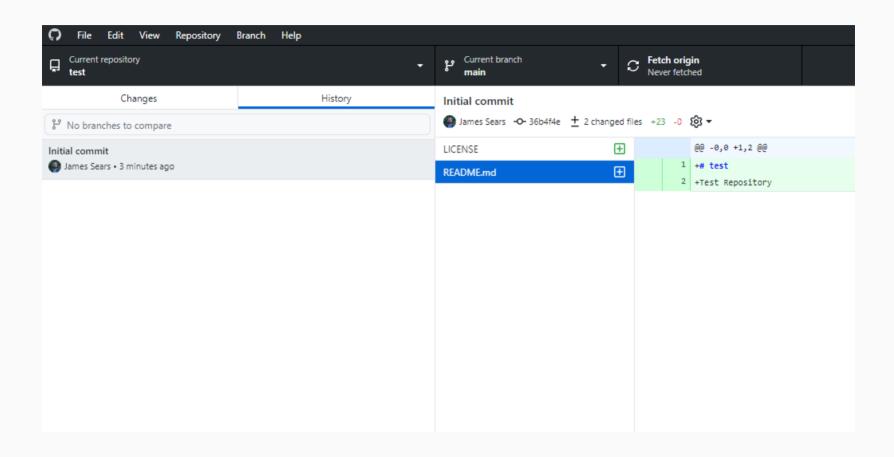
Clone Repository



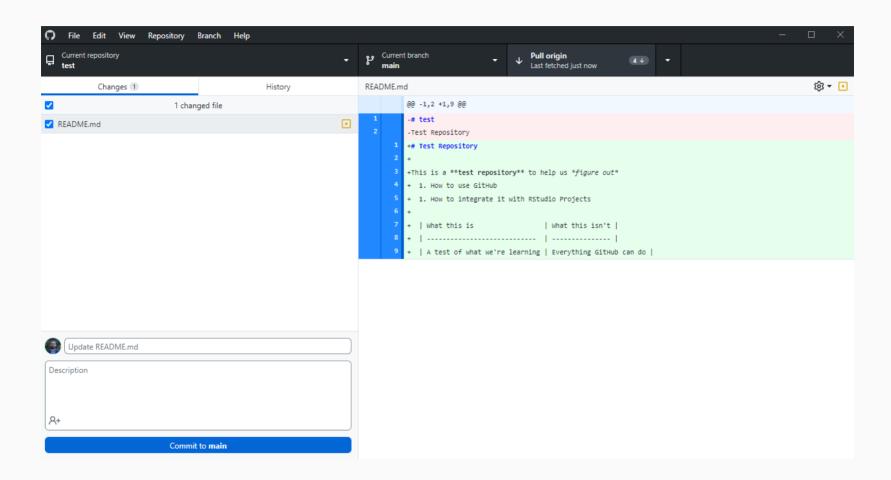
Clone Repository



Clone Repository



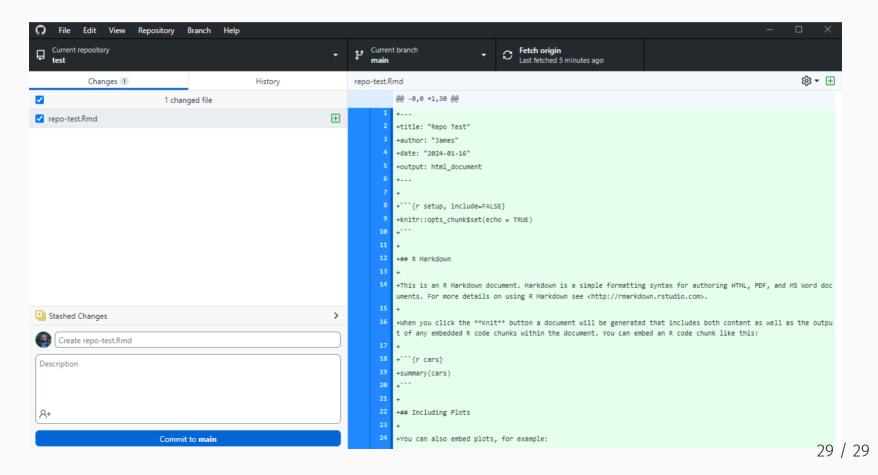
Fetch Origin + Pull to Stay Current



Make Local Changes to Repo

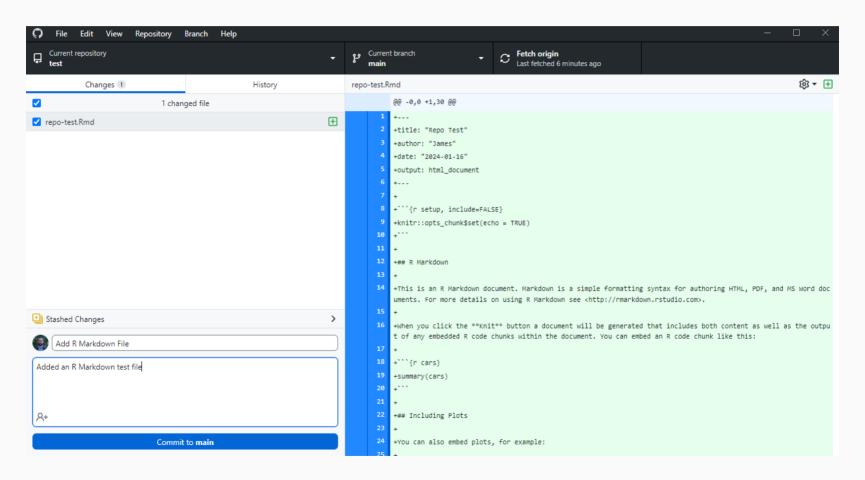
Save a new .Rmd file named repo-test into the "test" folder

• GitHub Desktop automatically stages the changes

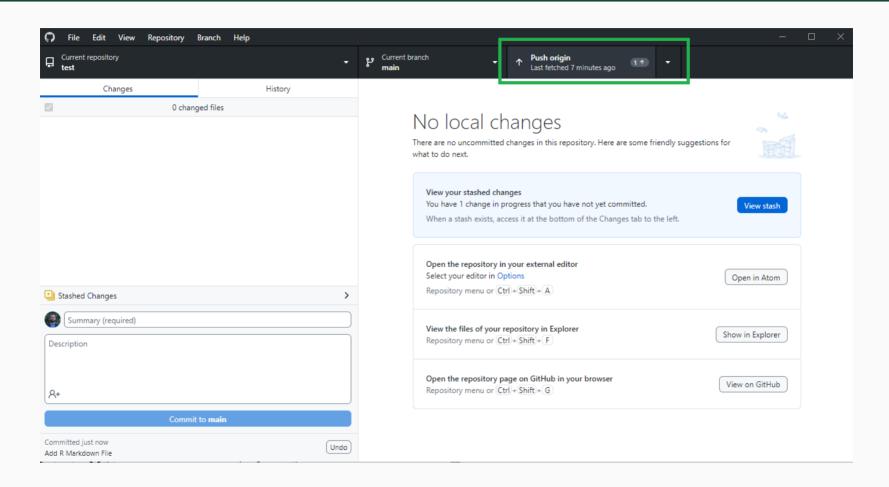


Commit Changes

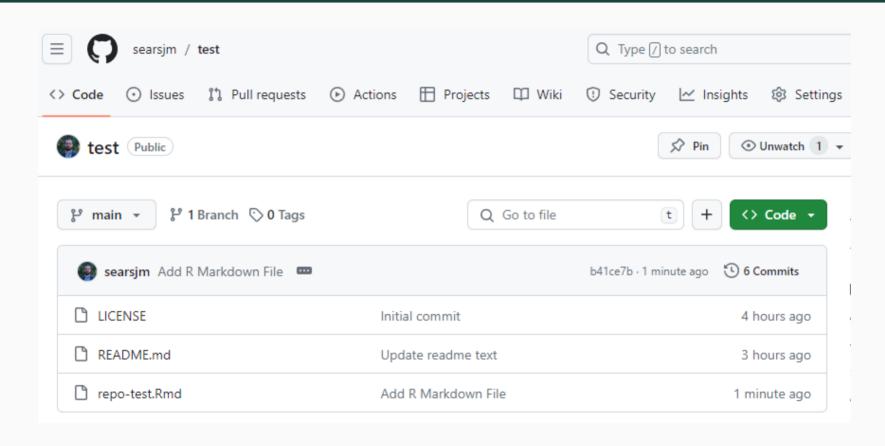
Add commit title and description, then commit to GitHub



Push Changes to GitHub Desktop



Repo now Matches Local Version



Other Tips and Productivity Tools

Productivity Miscellanea

What follows are miscellaneous things that I find improve my productivity

- **Synced Cloud Storage** (SpartanDrive or Dropbox/Box)
- **Overleaf** for LaTeX collaboration
- Connected Papers for literature networks

Synced Cloud Storage and OneDrive

Synced Cloud Storage is hugely beneficial if you work across **multiple computers** or **with many collaborators**.

- Make sure each computer has the most up-to-date version of all your files
- Renders flash drives almost entirely obselete!

Synced Cloud Storage and OneDrive

One easy way to do this: **SpartanDrive/OneDrive**

All faculty + staff get 5 TB of free storage on SpartanDrive (MSU's version of OneDrive)

Pros

- Free
- Syncable desktop apps
- Part of the MSU Office365 ecosystem

Cons

- Part of the MSU Office365 ecosystem
- Limited storage (5TB, 250gb max filesize)
- Sometimes finicky

Synced Cloud Storage

Alternatives to SpartanDrive:

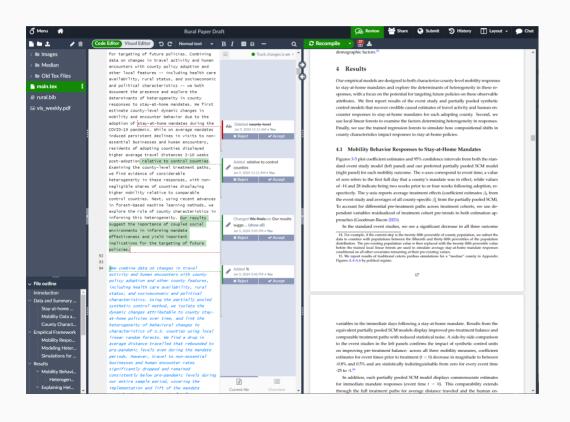
- **Dropbox**: 2GB free (\$10/mo for 2TB)
- **Box:** 10GB free (\$10/mo for 100GB)

Ultimate choice of platform may depend on coauthors + your current choice, but it's a good idea to **download the desktop app** to keep your files synced + backed up!

Also gives basic version control

Overleaf

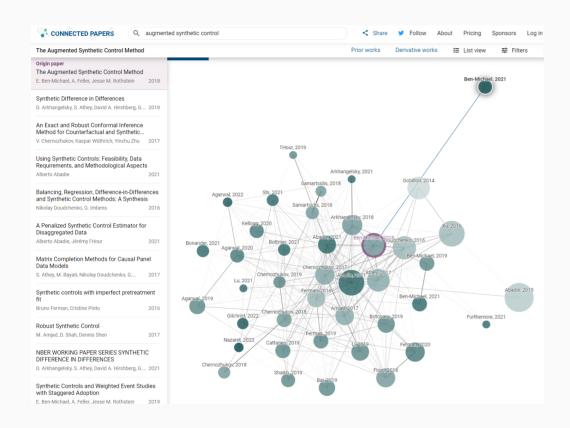
If you typeset using LaTeX, Overleaf streamlines access and collaboration



Free Version: remotely host all files, access for you + 1 collaborator

Paid (\$7.40/mo): track changes + full document history, Git(hub) + Dropbox integration, up to 6 collaborators

Connected Papers



- Graphical representation of paper networks
 - Visualize literature as directed graph
 - 5 free per month (unlimited for \$6/mo)

Productivity Miscellanea

Your Productivity Tips + Tricks?

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