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# Collaborative working on R (Markdown) documents via GitHub

# Outline

R

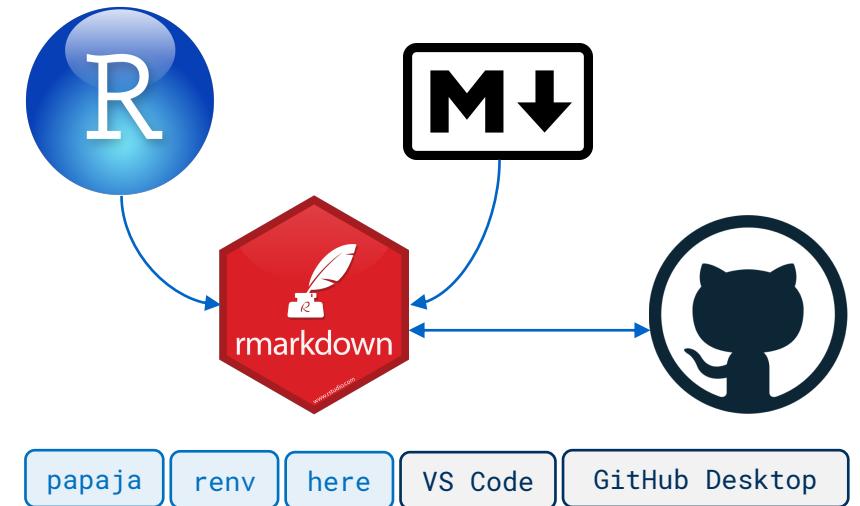
Markdown

R Markdown

GitHub

Recommended R packages

Recommended tools



# R and RStudio

R

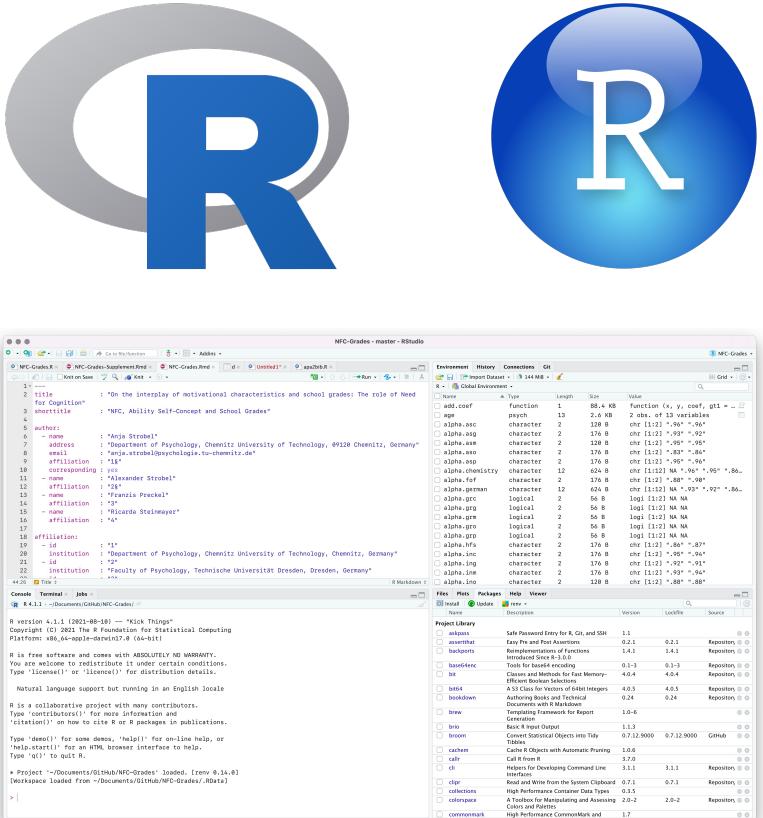
open environment (not only) for statistical computing  
easy to learn given basic statistical and programming skills  
allows to provide open code along with your data

## Rstudio

frontend to R (plus has prettier program icon)

comes with a number of benefits compared to stand-alone R including, but not limited to

- a graphical user interface
- many built-in features incl. R Markdown
- GitHub integration



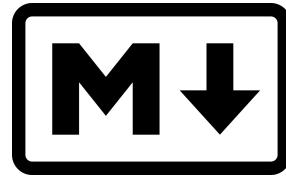
# Markdown

## Markdown

simplified markup language (i.e., an easy to learn alternative to HTML)

allows to format documents in an easy way, e.g.

```
# Heading 1  
## Heading 2  
*italic*  
**bold**  
> quote  
...  
  
Code block  
...  
  
$a^2 + b^2 = c^2$
```



Heading 1

---

Heading 2

*italic*

**bold**

quote

code block

$$a^2 + b^2 = c^2$$

# R Markdown

## R Markdown

combines the benefits of R and Markdown (and LaTeX), i.e., one writes text in markdown and includes R code in so-called R code chunks, e.g.

### # Method

```
We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study.
```

```
```{r correlation, echo = F}
set.seed(242)
X = rnorm(64)
Y = .5 * X + rnorm(64)
cor_XY = cor.test(X, Y)
Pval <- function(p) {
  if (p < .001) { pchar = 'p<.001$' }
  else { pchar = paste0('$p=', format(round(cor_XY$p.value, 3), nsmall = 3), '$') }
  return(pchar)
}

```

```

### # Results

```
As hypothesized, X was correlated with Y, $r=$ `r format(round(cor_XY$estimate, 2),
nsmall = 2)` , $df=$ `r cor_XY$parameter` , `r Pval(cor_XY$p.value)` .
```

## Compiled PDF

looks like this (even if you do not know the exact results in advance, because you defined placeholders in the Results section):

### Method

We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study.

### Results

As hypothesized, X was correlated with Y,  $r = 0.40$ ,  $df = 62$ ,  $p < .001$ .

# R Markdown

## R Markdown

allows for dynamic documents, i.e., if code changes, the document is updated and gives the correct results (no need to revise text by hand )

### # Method

We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study.

```
```{r correlation, echo = F}
set.seed(242)
X = rnorm(64)
Y = .5 * X + rnorm(64)
cor_XY = cor.test(X[-1], Y[-1])
Pval <- function(p) {
  if (p < .001) { pchar = '$p<.001$' }
  else { pchar = paste0('$p=', format(round(cor_XY$p.value, 3), nsmall = 3), '$') }
  return(pchar)
}
```

```

### # Results

As hypothesized, X was correlated with Y, `$r=$`r format(round(cor_XY$estimate, 2), nsmall = 2)``, `$df=$`r cor_XY$parameter``, ``r Pval(cor_XY$p.value)``.

## Compiled PDF

looks like this (after you removed observation 1 that was you for testing purposes) because you defined placeholders in the Results section:

### Method

We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study.

### Results

As hypothesized, X was correlated with Y, `r = 0.39, df = 61`,  $p = 0.001$ .

<https://github.com/alex-strobel/NFC-Grades>

# R Markdown

## One problem

### One problem ...

with R Markdown is that one cannot as easily revise or comment on documents as in Word

#### # Method

```
We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study.
```

```
```{r correlation, echo = F}
set.seed(242)
X = rnorm(64)
Y = .5 * X + rnorm(64)
cor_XY = cor.test(X[-1], Y[-1])
Pval <- function(p) {
  if (p < .001) { pchar = '$p<.001$' }
  else { pchar = paste0('$p=', format(round(cor_XY$p.value, 3), nsmall = 3), '$') }
  return(pchar)
}
```

```

#### # Results

```
As hypothesized, X was correlated with Y, $r=$ `r format(round(cor_XY$estimate, 2), nsmall = 2)`, $df=$ `r cor_XY$parameter`, `r Pval(cor_XY$p.value)`.
```

Here, you want to add a reference to Simmons, Nelson, & Simonsohn (2012)

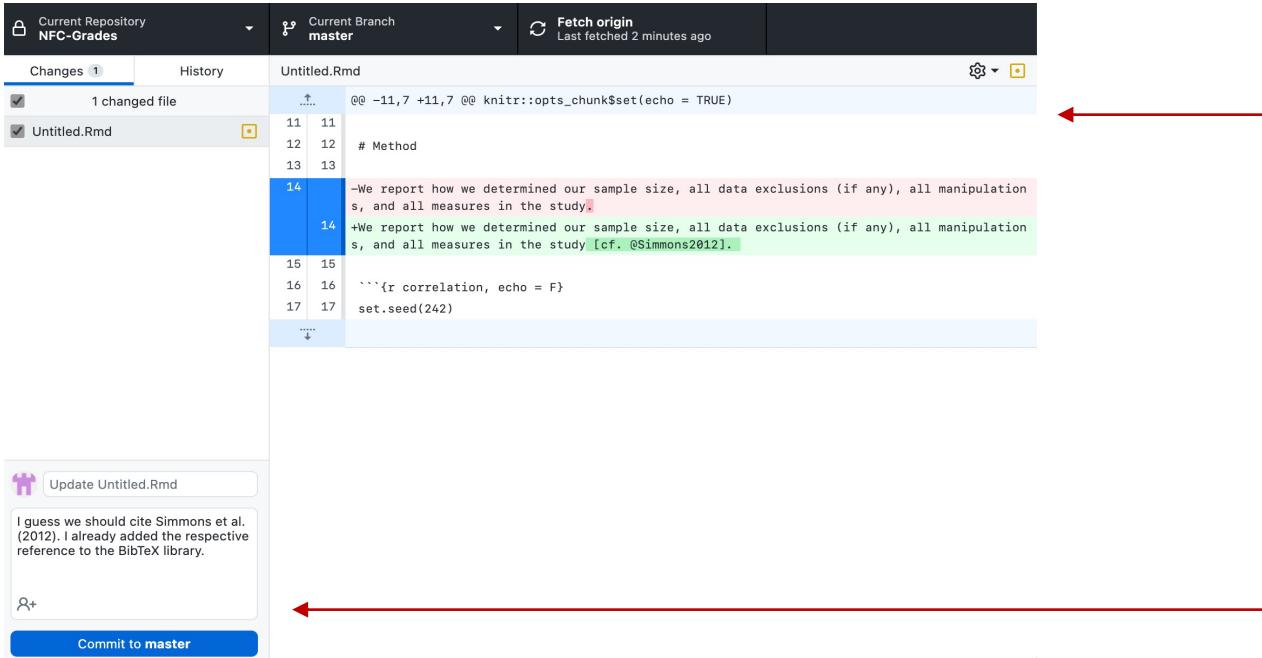
Here, you want state that according to APA, correlations are printed without leading zeroes

# R Markdown

## One solution

### One solution ...

is GitHub, you have version control and can revise documents (and comment on revisions) without permanently changing the document



The screenshot shows the GitHub Desktop application interface. At the top, there are dropdown menus for 'Current Repository' (NFC-Grades), 'Current Branch' (master), and 'Fetch origin' (Last fetched 2 minutes ago). Below this is a toolbar with icons for committing changes and pushing to origin.

The main area displays a file named 'Untitled.Rmd'. A red arrow points from the text 'Here, you add a reference to Simmons, Nelson, & Simonsohn (2012), and the change is highlighted in GitHub Desktop' to the line of code where a new citation is being added:

```
@@ -11,7 +11,7 @@ knitr::opts_chunk$set(echo = TRUE)
11 11
12 12 # Method
13 13
14 -We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study.
14 +We report how we determined our sample size, all data exclusions (if any), all manipulations, and all measures in the study [cf. @Simmons2012].
```

Below the code editor, a message box contains the text: 'I guess we should cite Simmons et al. (2012). I already added the respective reference to the BibTeX library.' A red arrow points from the text 'Here, you comment on your revision.' to this message box.

At the bottom right, there is a 'Commit to master' button.

Here, you add a reference to Simmons, Nelson, & Simonsohn (2012), and the change is highlighted in GitHub Desktop

Here, you comment on your revision.

# R Markdown

## One solution

### One solution ...

is GitHub, you have version control and can revise documents (and comment on revisions) without permanently changing the document

The screenshot shows a GitHub interface for a repository named 'NFC-Grades'. A pull request has been opened with one change to 'Untitled.Rmd'. The code editor shows a line of R code with a syntax error (missing closing parenthesis). A red arrow points from the text 'Here, you change some R code.' to this line of code. Below the code editor, a commit message box contains the text: 'Edited code to have correlation printed according to APA style'. Another red arrow points from the text 'Here, you comment on your revision.' to this commit message.

Here, you change some R code.

And here, you made a coding error, i.e., a missing closing parenthesis, but nevermind: this will stop the document compilation, you will get an error message (although not an informative one most of the time), but you can be assured that the code must work before a document will be compiled.

Here, you comment on your revision.

# GitHub

## GitHub

in case of R Markdown files, a group drive/sharepoint is of limited value, because if something changes, it may not be easy to keep track of these changes

also, if some change eventually results in a dead end, you may want to go back to a previous point in the "timeline" of your project

here, version control is really helpful, and GitHub enables it (in fact, it has been *made* for it, among other purposes)

the above examples showcase how revisions and comments can be implemented

comes with great features apart from code organization such as *Issues* and *Projects* (which things are to be done and by whom) or a *Wiki* (how are things to be done)

The screenshot shows a GitHub repository page for 'alex-strobel / DPP-LabManual'. The 'Code' tab is selected, showing a list of recent commits:

| File           | Description  | Date         |
|----------------|--|--------------|
| Administration | Update Readme.md   | yesterday    |
| Functions      | Update Readme.md   | 7 days ago   |
| Images         | Insert image on RDM  | yesterday    |
| Manuals        | Merge branch 'main' of https://github.com/alex-strobel/DPP-LabManual | 4 hours ago  |
| Research       | Update Readme.md   | 3 days ago   |
| Teaching       | Update Readme.md   | 3 days ago   |
| .Rhistory      | Create .Rhistory   | 3 months ago |
| .gitignore     | Create .gitignore  | 3 months ago |
| README.md      | Update Readme.md   | 6 days ago   |

Below the commits, the 'README.md' file is shown:

```
DPP-LabManual

Lab Manual of the Differential and Personality Psychology group (AG.DPP) at TU Dresden

So far, this manual is still under development and its contents have not yet been finally discussed and agreed upon by all team members. Still, it may already now be used for instructing new team members (e.g., master students) on how to use certain tools (see the Wiki) or perform certain routines (e.g., creating a reproducible environment for collaborative work on research projects). One major feature of this manual also will be to elaborate on what we as a group agree upon when it comes to organizing a research project.
```

# GitHub

## Basics

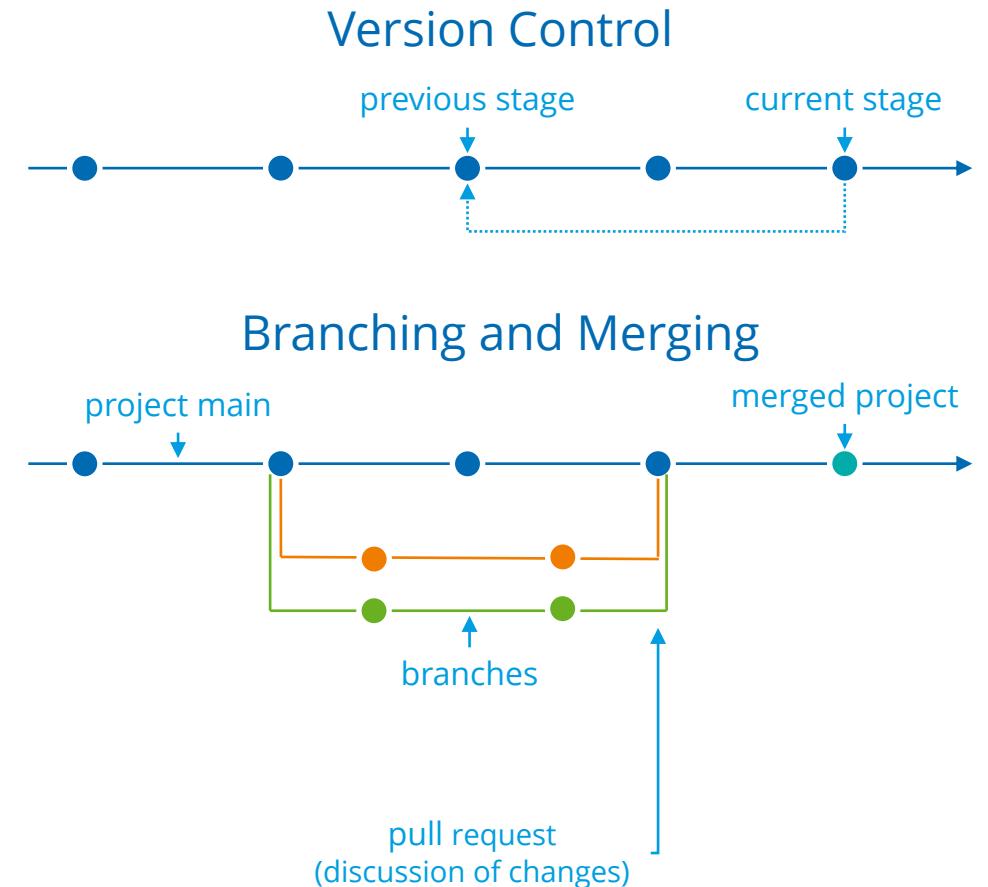
### GitHub Basics

GitHub is great for working together on code (in the broadest sense)

comes with version control, so that if something went wrong, you go back in the project timeline, so there is no need for having multiple files to monitor project progress such as *Project\_final.docx*, *Project\_final2.docx* etc. in order to be able to return to earlier project stages

also allows for parallel working on projects on different project branches that are merged in the end, which is especially helpful when working with several co-authors, so no need to integrate multiple word documents

Collaborative writing can of course be done via Google Docs/Sharepoint, yet, there is no (good) version control and working on R/R Markdown code will be not feasible



# GitHub Workflow

## GitHub Workflow

Researcher A creates GitHub repository, invites collaborators B and C via "Settings"

A, B, and C either work together

- on the main project „Code“ or
- work on separate tasks (as defined, e.g., via „Projects“ or „Issues“) or
- create a branch from the main timeline and later issue a „Pull request“
- organize their collaboration via Issues, Projects and perhaps a Wiki (here not visible)

The screenshot shows a GitHub repository page. At the top, there is a dark header bar with the GitHub logo, a search bar containing "Search or jump to...", and navigation links for "Pull requests", "Issues", "Marketplace", and "Explore". Below the header, the repository name "alex-strobel / My-Project" is displayed, with a "Private" badge next to it. The main content area shows tabs for navigating the repository: "Code", "Issues", "Pull requests", "Actions", "Projects", "Security", "Insights", and "Settings".

# GitHub

## Drawbacks

### GitHub Drawbacks

GitHub has been made by and for people who one could call nerds; so if you aren't a bit of a nerd, you might get lost, because of GitHub's structure and terminology

GitHub is not immediately compatible with spoken language

- retrieving the current project status is called a **pull**
- changing something is called a **commit**
- uploading your changes is called a **push**
- having created a branch and wanting to have it merged with the main project is called a **pull-request**

synchronizing with GitHub will work differently depending on your OS and code editor; best results IMHO are achieved using GitHub Desktop and/or VisualStudio Code (see below)

The screenshot shows a GitHub repository interface. At the top, there are two cards: 'Pull 2 commits from the origin remote' (with a 'Pull origin' button) and 'Push commits to the origin remote' (with a 'Push origin' button). Below these are sections for the repository's main branch ('main') and a specific file ('DPP-LabManual / README.md'). The file details show 23 lines (13 sloc), 2.58 KB, and a recent commit by 'alex-strobel' (9c6d69e, 12 days ago). A contributor list shows '1 contributor'. At the bottom, there is a preview of the README.md content: 'DPP-LabManual'.

# GitHub

## Benefits

### GitHub Benefits

collaboration is as easy as possible

project data and code are in one place and are always up to date

is also great as backup even when working alone on a project

project progress is marked with a time stamp, so all steps are transparent all the time, no one can engage in some HARKing as it will be evident if some hypothesis is added to the manuscript file at a later time point than the analysis code has been updated (can easily be faked of course, but good will presumed ...)

does not only support collaboration, but also sharing of data and code, because a whole project can be downloaded (aka „cloned“) in an instant instead of downloading OSF files one at a time

also has tools for project administration (Issues, Projects) and a built-in Wiki function

The screenshot shows two main sections of the GitHub interface. The top section displays a repository named 'alex-strobel/Merge branch 'main'' with a link to 'https://github.com/alex-strobel/NFC-F'. It shows 4 issues, 1 pull request, 1 action, 1 project, and security information. Below this is a 'Clone' section with options for HTTPS, SSH, GitHub CLI, and Git/SVN. The bottom section shows a 'Project board for NFC-Family' with four cards: 'ToDo: General' (Collaboration, data analysis and reporting), 'ToDo: Specific' (Decide on study materials), 'Decide on study materials' (link to BA\_Lewick\_final.pdf), and 'BA Lewick' (link to BA\_Lewick\_final.pdf).

# Recommended tools

## R packages

### papaja

lets you format your manuscript in APA6 format and includes a variety of helper functions, e.g., for reporting statistics in a proper (and properly formatted) way

### renv

stands for **r**eproducible **e**nvironment and stores your R analysis environment for a given project, so that people who want to reproduce your results not only have your code but the very R package versions you used

### here

assists with regard to file paths; with *here*, there is no need to edit path names of downloaded or cloned projects

### crsh/papaja

papaja (Preparing APA Journal Articles) is an R package that provides document formats to produce complete APA manuscripts from RMarkdown-files...

10 Contributors 87 Issues 505 Stars 125 Forks



here: find your PATH!

# Recommended tools

## Software

### GitHub Desktop

keeps track of all changes to your GitHub project,  
be them local or global

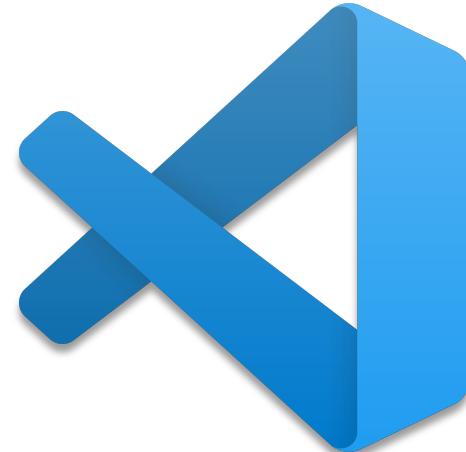
will prompt you to pull from the main project time  
line whenever something has changed and will  
support you to push changes from your timeline



### VisualStudio Code

this program is *the* code editor to go for, even if  
you do not want to work with GitHub and R or R  
Markdown, but like/want/need to work on code

comes with code highlighting depending on the  
programming language you use, has a preview,  
has dark mode (some people seem to like this 😊)



# Summary and outlook

## Summary

### Summary

Actually working on R Markdown files with GitHub integration at first might seem like „floxjam.com“:

Yet, after you have familiarized yourself with the terminology and mastered a first small project, you will not want to use other collaboration platforms anymore

Using R Markdown w/ GitHub will also enhance transparency and sharing of data and code

Using helper packages like *papaja*, *renv* and *here* brings added value

Using VisualStudio Code is in itself a great relief when it comes to coding, and together with GitHub, you can use its full potential (and if you have Spotify Premium, you can even listen to your music from within VS Code!)

**But don't just take my word for it,  
listen to this woman!** 

„GitHub makes collaboration so much easier! Everything is in one place and always up to date, no need to keep track of changes by yourself which is especially helpful when using R Markdown. And everything is so much more transparent ...“



Anja Strobel

# Summary and outlook

## Outlook

### Drawbacks

actually working on R Markdown files with GitHub will most certainly result in a number of issues

you will *initially* need to resort to astonishingly incomprehensible help pages (yet, mostly bc of R Markdown)

yet, you will also *later on* need to resort to astonishingly incomprehensible help pages, so why not start now?!

### Benefits

After the first manuscript, you will master R Markdown to some degree and more so after the second, and after the third, you will be annoyed that your co-authors do not know R Markdown, so you have to compile everything to a stupid Word document for them to review/revise it



<https://www.exemplifygroup.com/look-benefits-drawbacks-unified-communications/>

# Further resources

## GitHub

- [GitHub's Git Guides](#)
- [Happy Git With R](#)



## R Markdown

- [R Markdown Guide](#)
- [R Markdown Cheat Sheet](#)
- [R Markdown Course](#) (developed by Christoph and me, workshop will be offered as soon as possible)



## Using GitHub and renv/heredoc to collaborate on R Markdown projects

- [our tutorial on collaboration via GitHub](#) (note, we are just about re-organizing our [LabManual](#), so you may need to click through from the root)

A screenshot of a GitHub repository page. At the top, there is a navigation bar with links for 'Pull requests', 'Issues', 'Marketplace', and 'Explore'. Below the navigation bar, the repository name 'alex-strobel / DPP-LabManual' is shown as public. At the bottom of the screenshot, there is a navigation bar with links for 'Code', 'Issues 4', 'Pull requests', 'Actions', 'Projects 1', and 'Wiki'.

# Thank you!