Reproducible science: Module7

Version control Git and Github

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Part 1. Using Version Control

Version Control

- Research papers have many versions before publication
 - typically written over a long period of time, in numerous sittings
 - at the end of every sitting, essentially a different version of the same manuscript is created*

Version Control

- Research papers have many versions before publication
 - typically written over a long period of time, in numerous sittings
 - o at the end of every sitting, essentially a different version of the same manuscript is created
- With many versions created over time, there emerge at least two challenges
 - keeping track of changes and versions
 - reverting to a previous version when necessary
- We all version control, in different ways, such as
 - edit, rename, save
 - use applications or websites such as Dropbox, Google Docs, Overleaf
 - use distributed version control systems such as Git and GitHub

Version Control — Manual Attempts

Typically, hand-made attemps to version control lead to cluttered folders

Version Control — Git and GitHub — Definitions

- Git
 - a software that keeps track of versions of a set of files
 - it is *local* to you, the records are kept on your computer
- GitHub
 - a hosting service, or a website, that can keep the records
 - it is *remote* to you, like the Dropbox website
 - but unlike Dropbox, GitHub is specifically structured to keep records with Git
- Repository, or repo
 - o a set of files whose records are kept together, by Git and/or on GitHub
 - o it is like a folder, which can keep files and other folders containing files

Version Control — Git and GitHub — Definitions

- To commit
 - to take a snaphot of, or to version, a repository
 - it is like saving a new version of all files and sub-folders in your project folder with a new name
 - o it is local, the records are kept on your computer unless you push
- To push
 - to move the records from Git to GitHub, from your computer to online server
 - it is like uploading (the new versions of) your files and sub-folders to a website,
 - it also involves merging, if this not the first push

^{*} For projects that are single-authored on a single computer, merging is typically automatic. It becomes an issue for collaborated projects, which we will cover in the next section — Part 9.

Version Control — Git and GitHub

Version control with Git and GitHub requires

- 1. initial setup, done once*
 - unless for a new computer or, if ever, a new GitHub account
 - o a bit technical, but worth the hassle
- 2. project setup, repeated for every paper
 - shorter, less complicated

^{*} We have started this process already, in Part 1 of the workshop, by downloading and installing Git and signing up for GitHub. Back to the relevant slide.

Part 2. Getting the Tools Ready

Git — Download from the Internet and Install

- For Windows, install 'Git for Windows', downloading from https://gitforwindows.org
 - select 'Git from the command line and also from 3rd-party software'
- For Mac, install 'Git', downloading from https://git-scm.com/downloads

GitHub — Open an Account

Sign up for GitHub at https://github.com

- registering an account is free
- usernames are public
 - either choose an anonymous username (e.g., asdf029348)
 - or choose one carefully it becomes a part of users' online presence
- usernames can be changed later

RStudio — R Markdown Options

RStudio offers various functions that facilitate working with .Rmd documents, which can be controlled at two locations:

- global settings that apply to all markdown projects, located at:
 - Tools -> Global Options -> R Markdown



RStudio — R Markdown Options

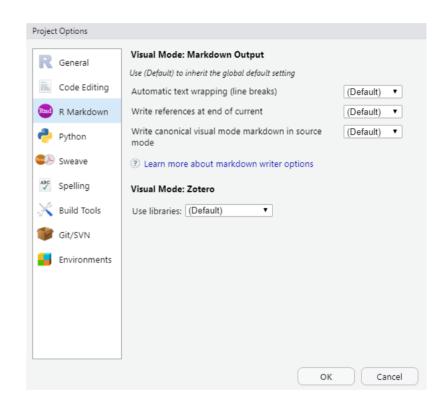
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• global settings that apply to all markdown projects, located at:

```
Tools -> Global Options -> R Markdown
```

 project settings that apply to a given markdown project, located at:

Tools -> Project Options -> R Markdown



Introduction to command line interface

What is the Command Line Interface?

Nearly ever computer comes with a CLI

· Windows: Git Bash (See "Introduction to Git")

· Mac/Linux: Terminal

Introduction to command line interface

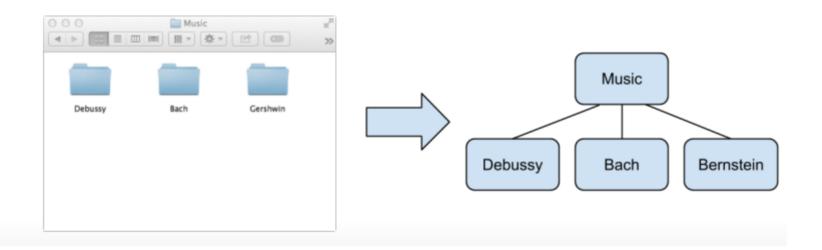
What can the CLI do?

The CLI can help you:

- · Navigate folders
- · Create files, folders, and programs
- · Edit files, folders, and programs
- · Run computer programs

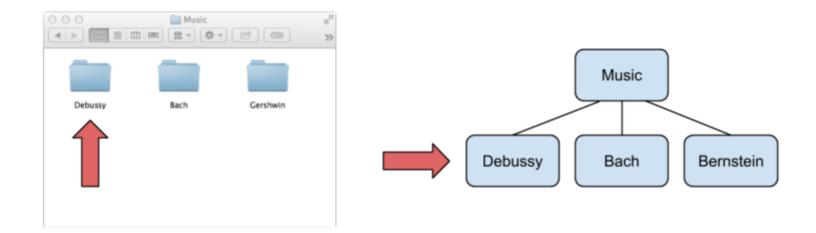
Basics of Directories

- · "Directory" is just another name for folder
- · Directories on your computer are organized like a tree
- · Directories can be inside other directories
- · We can navigate directories using the CLI



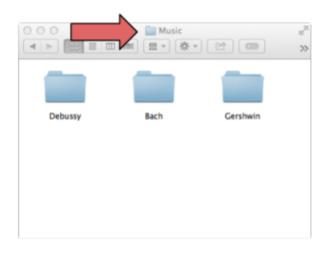
Basics of Directories

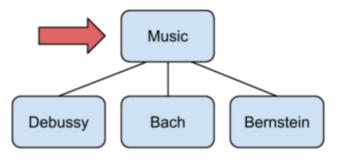
· My "Debussy" directory is contained inside of my "Music" directory



Basics of Directories

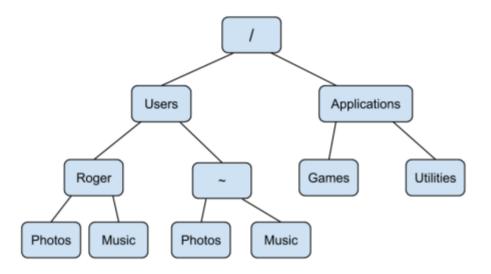
· One directory "up" from my Debussy directory is my Music directory





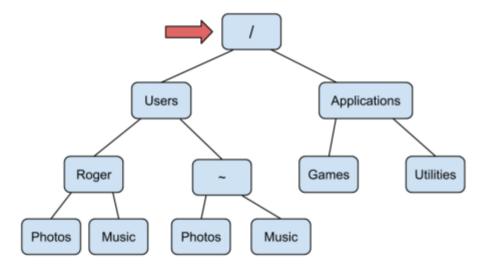
Your computer's directory structure

· The directory structure on your computer looks something like this



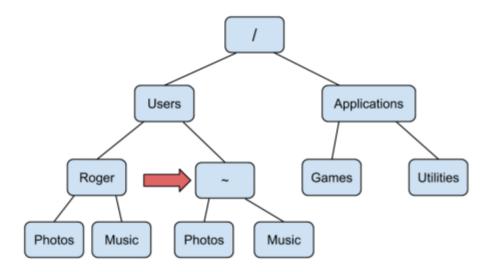
Special directories: root

- · The directory at the top of the tree is called the root directory
- · The root directory contains all other directories
- · The name of this directory is represented by a slash: /



Special directories: home

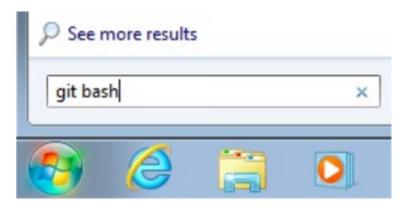
- · Your home directory is represented by a tilde: ~
- · Your home directory usually contains most of your personal files, pictures, music, etc.
- · The name of your home directory is usually the name you use to log into your computer



Navigating directories with the CLI

Windows users:

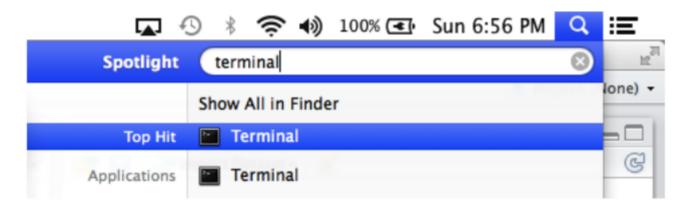
- · Open the start menu
- · Search for Git Bash
- · Open Git Bash



Navigating directories with the CLI

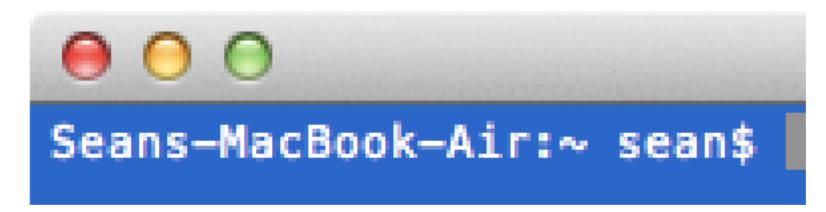
Mac users:

- · Open Spotlight
- · Search Terminal
- · Open Terminal



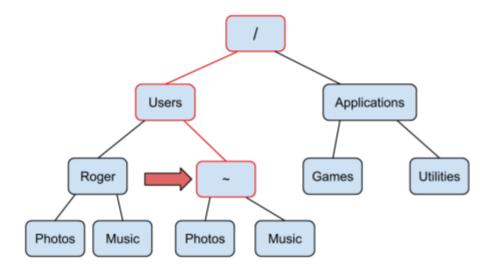
CLI Basics

- · When you open your CLI you will see your prompt, which will looks something like the name of your computer, followed by your username, followed by a \$
- · When you open your CLI you start in your home directory.
- Whatever directory directory you're currently working with in your CLI is called the "working directory"



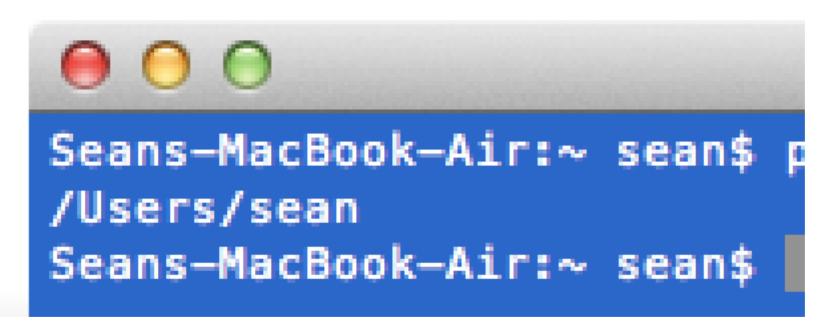
CLI Basics

- · You can imagine tracing all of the directories from your root directory to the directory you're currently in.
- · This is called the "path" to your working directory.



CLI Basics

- · In your CLI prompt, type pwd and press enter.
- · This will display the path to you're working directory.
- · As you can see we get the prompt back after entering a command.



- · You use the CLI prompt by typing in a command and pressing enter.
- pwd can be used at any time to display the path to your working directory (pwd is an abbreviation for "print working directory")

- · CLI commands follow this recipe: command flags arguments
- · command is the CLI command which does a specific task
- flags are options we give to the command to trigger certain behaviors, preceded by a -
- · arguments can be what the command is going to modify, or other options for the command
- · Depending on the *command*, there can be zero or more *flags* and *arguments*
- · For example pwd is a command that requires no flags or arguments

· pwd displays the path to the current working directory

```
jeff$ pwd
/Users/jeff
jeff$
```

· clear will clear out the commands in your current CLI window

jeff\$ pwd
/Users/jeff
jeff\$ clear

jeff\$

- · 1s lists files and folders in the current directory
- · 1s -a lists hidden and unhidden files and folders
- · 1s -a1 lists details for hidden and unhidden files and folders
- · Notice that -a and -1 are flags (they're preceded by a -)
- · They can be combined into the flag: -a1

```
jeff$ ls
Desktop Photos Music
jeff$ ls -a
Desktop Photos Music .Trash .DS_Store
jeff$
```

- · cd stands for "change directory"
- · cd takes as an argument the directory you want to visit
- · cd with no argument takes you to your home directory
- · cd .. allows you to chnage directory to one level above your current directory

```
jeff$ cd Music/Debussy
jeff$ pwd
/Users/jeff/Music/Debussy
jeff$ cd ..
jeff$ pwd
/Users/jeff/Music
jeff$ cd
jeff$ pwd
/Users/jeff
for
jeff$ pwd
```

- · mkdir stands for "make directory"
- · Just like: right click -> create new folder
- · mkdir takes as an argument the name of the directory you're creating

```
jeff$ mkdir Documents
jeff$ ls
Desktop Photos Music Documents
jeff$ cd Documents
jeff$ pwd
/Users/jeff/Documents
jeff$ cd
jeff$
```

· touch creates an empty file

```
jeff$ touch test_file
jeff$ ls
Desktop Photos Music Documents test_file
jeff$
```

- · cp stands for "copy"
- cp takes as its first argument a file, and as its second argument the path to where you want the file to be copied

```
jeff$ cp test_file Documents
jeff$ cd Documents
jeff$ ls
test_file
jeff$ cd ..
jeff$
```

- · cp can also be used for copying the contents of directories, but you must use the -r flag
- · The line: cp -r Documents More_docs copies the contents of Documents into More_docs

```
jeff$ mkdir More_docs
jeff$ cp -r Documents More_docs
jeff$ cd More_docs
jeff$ ls
test_file
jeff$ cd ..
jeff$
```

- · rm stands for "remove"
- · rm takes the name of a file you wish to remove as its argument

```
jeff$ ls

Desktop Photos Music Documents More_docs test_file
jeff$ rm test_file
jeff$ ls

Desktop Photos Music Documents More_docs
jeff$
```

- · You can also use rm to delete entire directories and their contents by using the -r flag
- · Be very careful when you do this, there is no was to undo an rm

```
jeff$ ls
Desktop Photos Music Documents More_docs
jeff$ rm -r More_docs
jeff$ ls
Desktop Photos Music Documents
jeff$
```

- · mv stands for "move"
- · With mv you can move files between directories

```
jeff$ touch new_file
jeff$ mv new_file Documents
jeff$ ls
Desktop Photos Music Documents
jeff$ cd Documents
jeff$ ls
test_file new_file
jeff$
```

· You can also use mv to rename files

```
jeff$ ls
test_file new_file
jeff$ mv new_file renamed_file
jeff$ ls
test_file renamed_file
jeff$
```

· echo will print whatever arguments you provide

jeff\$ echo Hello World! Hello World! jeff\$

· date will print today's date

```
jeff$ date
Mon Nov 4 20:48:03 EST 2013
jeff$
```

Summary of Commands

- pwd
- · clear
- · ls
- · cd
- · mkdir
- · touch
- . ср
- · rm
- · mv
- · date
- · echo

Overview of commands in git

Pushing and pulling

Git Data Transport Commands http://osteele.com commit -a add (-u) commit push local remote workspace index repository repository pull or rebase fetch checkout HEAD revert checkout compare diff HEAD diff

Adding

- · Suppose you add new files to a local repository under version control
- · You need to let Git know that they need to be tracked
 - git add . adds all new files
 - git add -u updates tracking for files that changed names or were deleted
 - git add -A does both of the previous
- · You should do this before committing

Committing

- · You have changes you want to commit to be saved as an intermediate version
- · You type the command
 - git commit -m "message" where message is a useful description of what you did
- · This only updates your local repo, not the remote repo on Github

Pushing

- · You have saved local commits you would like to update on the remote (Github)
- · You type the command
 - git push

Branches

- · Sometimes you are working on a project with a version being used by many people
- · You may not want to edit that version
- · So you can create a branch with the command
 - git checkout -b branchname
- · To see what branch you are on type:
 - git branch
- · To switch back to the master branch type
 - git checkout master

Pull requests

- · If you fork someone's repo or have multiple branches you will both be working seperately
- · Sometimes you want to merge in your changes into the other branch/repo
- · To do so you need to send a pull request.
- · This is a feature of Github.

Time to be a hacker!

- · Git documentation http://git-scm.com/doc
- · Github help https://help.github.com/
- · Google/Stack Overflow are great for Github

Version Control — Git — Initial Setup

- 1) Enable version control with RStudio
 - from the RStudio menu, follow:

```
Tools -> Global Options -> Git/SNV -> Enable version control interface for RStudio projects
```

- RStudio will likely find Git automatically. In case it cannot, Git is likely to be at
 - ∘ c:/Program Files/Git/bin/git.exe on Windows
 - /usr/local/git/bin/git on Mac

Version Control — Git — Initial Setup

- 2) Set Git Bash as your shell (Windows-only step)
 - from the RStudio menu, follow:

```
Tools -> Global Options -> Terminal -> New terminals open with: Git Bash
```

Version Control — Git — Initial Setup

- 3) Introduce yourself to Git
 - from the RStudio menu, follow:

```
Tools -> Terminal -> New Terminal
```

• enter the following lines in the Terminal, with the email address that you have used to sign up for GitHub

```
git config --global user.name "YOUR-NAME"
git config --global user.email "YOUR-EMAIL-ADDRESS"
```

• enter the following line in the Terminal, to observe whether the previous step was successful

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

Version Control — Git and Github — Project

- 1) Initiate local version control with Git
 - from the RStudio menu, follow:
 - Tools -> Version Control -> Project Setup... -> Version Control System -> Git
 - after confirming your new repository, and restarting the session, observe that
 - now there is now a Git tab in RStudio, documenting the differences between you local repository and the one on GitHub. When you change a file, it will appear here.
 - your project now includes a .gitignore file
 - this is where you can list files and/or folders to be excluded from being tracked

Version Control — Git and Github — Project Setup

- 2) Create a new GitHub repository
 - on GitHub, follow:

```
Repositories -> New -> Repository name (e.g., "rwd_workshop") -> Public -> Create repository
```

- observe that
 - repository URLs have the following structure: https://github.com/USER_NAME/REPOSITORY_NAME
 - this is the address to view the repository online
 - for use in the Terminal, the address gets the .git extension
 - e.g., https://github.com/USER_NAME/REPOSITORY_NAME.git

Version Control — Git and Github — Project Setup

- 3) Push an existing repository
 - from the RStudio menu, follow:

```
Tools -> Terminal -> New Terminal
```

• enter the following lines in the Terminal, with your username and repository name

```
git remote add origin https://github.com/USER_NAME/REPOSITORY_NAME.git
git add .
git commit -m "first commit"
git push -u origin master
```

- if this is your first time using GitHub with RStudio, you will be prompted to authenticate
 - follow the instructions on your screen and in your email
- observe that your project files are now online, listed on the GitHub repository

Version Control — Git and Github — Workflow

1) Edit and Save

- work on one or more files under version control
 - e.g., delete the first sentence of the abstract in journals. Rmd, and save it
 - o under the Git tab in RStudio, find the list of files that you edited since the last push
 - these will have M, for modified, as Status

2) Commit and Push

- tick Staged* for one or more files that you would like to commit
 - enter a Commit message that summarises the edits
 - click Commit to create a record of the new version locally to your computer
 - click Close -> Push to push the version to GitHub

^{*} To stage is to add files to be committed. It allows us to commit files individually or together with other files.

Version Control — Git and Github — Workflow

1) Edit and Save

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 - e.g., delete the first sentence of the abstract in journals. Rmd, and save it
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2) Commit and Push

- tick Staged for one or more files that you would like to commit
 - enter a Commit message that summarises the edits
 - click Commit to create a record of the new version locally to your computer
 - click Close -> Push to push the version to GitHub
- observe the changes in the Git tab in RStudio and on the GitHub repository

- .gitignore specifies which file(s) and/or folder(s) should be excluded from version control
 - a set of project-specific files are ignored by default
 - see your .gitignore file
- .gitignore lists one item per line
 - each line has a pattern, which determines whether one or more files or folders are to be ignored
- See the documentation at https://git-scm.com/docs/gitignore
 - for pattern formats and further details

- There might be good reasons to ignore some others, including files
 - that contain information that we do not want others to see
 - e.g., personal API keys
 - that we do not have the right to share with others
 - e.g., secondary data with user agreements otherwise
 - that we (re-)create automatically as outputs
 - e.g., journals.pdf, as opposed to journals.Rmd

- Observe that, by default, .gitignore has a list of project-specific files
 - you can delete, or comment out, any or all to start including them in version control

- .Rproj.user
- .Rhistory
- .RData
- .Ruserdata

- Observe that, by default, .gitignore has a list of project-specific files
- In addition, you can ignore, for example,
 - a specific folder, relative to the root directory

```
.Rproj.user
.Rhistory
.RData
.Ruserdata
/manuscript/ #<</pre>
```

- Observe that, by default, .gitignore has a list of project-specific files
- In addition, you can ignore, for example,
 - a specific folder, relative to the root directory
 - a specific file in a specific folder, relative to the root directory

```
.Rproj.user
.Rhistory
.RData
.Ruserdata
/manuscript/
/manuscript/journals.pdf #<</pre>
```

- Observe that, by default, .gitignore has a list of project-specific files
- In addition, you can ignore, for example,
 - a specific folder, relative to the root directory
 - a specific file in a specific folder, relative to the root directory
 - a specific file in any folder

```
.Rproj.user
.Rhistory
.RData
.Ruserdata
/manuscript/
/manuscript/journals.pdf
journals.pdf
```

- Observe that, by default, .gitignore has a list of project-specific files
- In addition, you can ignore, for example,
 - a specific folder, relative to the root directory
 - a specific file in a specific folder, relative to the root directory
 - a specific file in any folder
 - all files with a specific extension, anywhere in the project

```
.Rproj.user
.Rhistory
.RData
.Ruserdata
/manuscript/
/manuscript/journals.pdf
journals.pdf
**.pdf
```

- There are many other pattern formats
 - see the documentation at https://git-scm.com/docs/gitignore
- Starting to ignore a file or folder that is already being tracked requires clearing the cache
 - after changing and saving .gitignore, enter the following line in the Terminal
 - with your speficic /path/to/file

```
git rm --cached /path/to/file
```

- The following command clears *all* cache
 - might be useful after changes to .gitignore that involves several files or folders
 - but should be used with care, on an otherwise up-to-date repository

```
git rm -r --cached .
```

Part 3. Collaborating with Others

Collaboration

- Many research papers are written by multiple authors and/or on multiple computers
 - yourself on a different computer (e.g., laptop at home, desktop at office), poses similar challenges as collaboration
- With multiple authors and/or computers, there emerges at least two additional challenges beyond version control
 - communicating the versions to other authors and/or computers
 - working on the same project with co-authors at the same time
- We all manage collaboration, in different ways, such as
 - edit, rename, save, e-mail
 - use applications or websites such as Dropbox, Google Docs, Overleaf
 - use distributed version control systems such as Git and GitHub

Collaboration — Git and GitHub — Definitions

- To pull
 - to move the (presumably) up-to-date records from GitHub to your computer
 - it is like downloading a zipped folder of files
- To merge
 - to integrate different versions into a single version
 - e.g., the old version on your laptop, with (the changes in) the new version from GitHub
 - except the first push or pull, pushing and pulling necessiate merging
- Merge conflict
 - o emerges when versions to be merged include edits on the same line of the same file
 - edits on different lines are not a problem as changes are tracked line by line
 - less likely to occur in one-author-multiple-computer setting
 - more likely while collaborating with others
 - requires human intervention, to decide which edit to keep and which one to discharge

Collaboration — Git and GitHub — Definitions

- Branch
 - a line of development in a repository; a copy of the repository, with all its versions, at a given time
 - by default, repositories have one branch, called *master*
- Pull request
 - a proposal to pull and merge
 - e.g., a proposal from one co-author to another, -e.g., tp merge a branch into master
 - o it allows a review of changes on GitHub before merge, to deal with potential merge conflicts

Collaboration — Git and GitHub — Project Setup

- The setup depends on the users' role, on whether they are
 - the *owner* who creates the GitHub repository, or
 - the *collaborator* who is then added to that repository
- Once the project is setup
 - it continues to be associated with the owner's GitHub profile
 - o at the same time, it is listed under the collaborator's profile as well
 - both the owner and the collaborator have the same rights, unless otherwise restricted

Collaboration — Git and GitHub — Project Setup — Owner

- 1) The setup for the owner is largely the same as in any single-author, single-computer scenario
 - following the instructions on this slide forward
 - to introduce version control to a local project with Git,
 - to create a remote repository for that project on GitHub, and
 - to associate the local project with the remote repository
- 2) As an additional step, the owner needs to invite their collaborator(s) to the project
 - following, from the relevant GitHub repository,
 - Settings -> Manage access -> Invite a collaborator

Collaboration — Git and GitHub — Project Setup — Collaborator

- 1) Notice that the remote part of the setup is done by the owner for the collaborator
 - subject to acceptance of the invitation
 - invitations are available directly at https://github.com/notifications, but also sent via email
 - with an option to "Accept invitation"
 - on acceptance, projects appear among the repositories of the collaborator
- 2) The local part of the setup still needs to be done
 - by creating a new RStudio project with version control
 - following, from the Rstudio menu,*
 - File -> New Project -> Version Control -> Git
 - the Repository URL, required for the above process, is the version without the .git extension
 - in the form of https://github.com/OWNER_USER_NAME/REPOSITORY_NAME

Colloboration — Git and Github — Workflow

1) Pull

- on the Git tab in RStudio, click Pull to move the up-to-date records from GitHub to your computer
 - if your collaborator has not pushed anything since your last pull, you will be noticed that Already up-to-date.
 - collaborative projects require pulling as well as pushing because your collaborator(s) might have pushed their commits to GitHub
 - pulling frequently minimises the risk of merge conflicts

2) Edit and save; commit and push

- the same procedure as in any single-author, single-computer scenario
 - as described on this slide forward
- pushing frequently minimises the risk of merge conflicts
- notice that you have not encountered any errors and/or merge conflicts
 - because everyone edited and merged with an up-to-date document
 - this is the default scenario in single-author, multiple computer scenario

Colloboration — Git and Github — Workflow — Alternative

- The workflow above is rather simple, but has some disadvantages, including
 - not easy, albeit still possible, to see the edits of the collaborators
 - not clear who is in charge of the overall progress
 - not possible to discuss edits
 - not possible to compromise on conflicting edits
- An alternative workflow exits
 - work on different branches of the same project
 - version control to your own branch
 - create pull requests with comments
 - merge the branch into master

Colloboration — Git and Github — Workflow — Alternative

1) Branch

- click New Branch on the Git tab
 - name it, and leave everything else as default
 - notice that you are now working on a new branch

2) Edit and save; commit and push

- the same procedure as in any single-author, single-computer scenario
 - as described on this slide forward
- notice, on GitHub, that your commit is in the new branch, while *master* remains unchanged

3) Pull request

- On GitHub, click
 - Pull requests -> New pull request
- choose what is to be pulled, and write a note to your collaborator who can accept or reject the merge
 - if there are merge conflicts, the collaborator solves them on GitHub before merging

Colloboration — Git and Github — Workflow — Notes

- It is possible to edit . Rmd documents directly on GitHub
 - click on any editable file, and Edit this file
 - commit changes, either as a direct commit or a pull request
- A GitHub account is enough for collaboration with co-authors who do not work with Git, R, or RStudio
 - not possible to knit to see the outcome
 - would suit co-authors whose contributions are plain text

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Thank you for listening!

Any questions now or email me at dossa@xtbg.org.cn

Slides created via the R package xaringan.

The chakra comes from remark.js, knitr, and R Markdown.