

# YAML metadata for R Markdown with examples

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## test for document metadata

<b>YAML metadata (header) in R Markdown</b>	<b>2</b>
<b>Useful websites</b>	<b>2</b>
<b>useful tools</b>	<b>2</b>
<b>Terminology and norms</b>	<b>2</b>
<b>Basic</b>	<b>2</b>
Syntax . . . . .	2
Basic setting metadata . . . . .	5
<b>advanced options for html and pdf</b>	<b>7</b>
html . . . . .	7
pdf . . . . .	8
<b>Bibliographies and Citations</b>	<b>9</b>
<b>Chinese/Japanese support</b>	<b>10</b>
<b>parameters and arguments</b>	<b>10</b>
params . . . . .	10
Pandoc arguments . . . . .	11
<b>shared options</b>	<b>12</b>
<b>Future work</b>	<b>12</b>
<b>Refereces</b>	<b>12</b>

# YAML metadata (header) in R Markdown

YAML is a human-readable and easy to write language to define data structures.

Rmd makes it possible to use a YAML header to specify certain parameters right at the beginning of the document. Built-in YAML parameters make it easier to create more organized and informative reports. However, there are few tutorials or summarized articles to display all the settings and parameters for **YAML metadata** in R Markdown. This readme file give you the power to easily control R Markdown by YAML.

## Useful websites

- <https://rmarkdown.rstudio.com/formats.html> — R Markdown formats from RStudio
- <https://www.r-bloggers.com/2020/08/useful-yaml-options-for-generating-html-reports-in-r/> — Useful YAML options for generating HTML reports in R

## useful tools

- <https://yamlthis.r-lib.org/index.html> — yamlthis: a package for writing YAML for R Markdown
- <https://github.com/kamapu/yamlme> — This package aims to save documents with their respective settings (yaml-head) in R-objects.

## Terminology and norms

- R lang – use upper case letter R
- Rmd – capitalizes the first letter for Rmd files
- R Markdown – the R Markdown module or notebook of Rstudio
- rmarkdown – the package of **rmarkdown**
- YAML – / jæmæl/ a recursive acronym for “YAML Ain’t Markup Language”
- YAML header/metadata – the settings data written by YAML in Rmd header
- All the YAML metadata are **lower case letters** except file paths or file names

## Basic

### Syntax

#### Data Structure

Source: yamlthis package(Barrett and Iannone 2021) vignette

A YAML code block should be fenced in with `---` before and after (you can also use `...` to end the YAML block, but this is not very common in R Markdown).

1. Scalars, or variables, are defined using a colon and a **space**. A dictionary is represented in a simple **key: value** form (the colon must be followed by a **space**)

```

---
title: "YAML metadata for R Markdown with examples"
author: Hao Liang
fontsize: 12pt
---

```

2. All members of a list are lines beginning at the same indentation level starting with a '- ' (a dash and a space):

```

# A list of tasty fruits
- Apple
- Orange
- Strawberry
- Mango

# OR
[Apple, Orange, Strawberry, Mango]

```

3. More complicated data structures are possible, such as lists of dictionaries, dictionaries whose values are lists or a mix of both:

```

author:
  - Name_1    # can be indented or not
  - Name_2    # but be consistent among different entries

```

4. Dictionaries and lists can also be represented in an abbreviated form if you really want to:

```

author: [Name_1, Name_2]

```

5. Strings can be denoted with a | character, which preserves newlines, or a > character, which folds newlines.

```

abstract: |
  One or two sentences providing a basic introduction to the field, comprehensible to a scientist
  Two to three sentences of more detailed background, comprehensible to scientists in relation

abstract: >
  One or two sentences providing a basic introduction to the field, comprehensible to a scientist
  Two to three sentences of more detailed background, comprehensible to scientists in relation

```

6. Logical values in YAML are unusual: true/false, yes/no, and on/off are all equivalent to TRUE/FALSE in R. Any of these turn on the table of contents:

```

toc: true
toc: yes
toc: on

```

## Indent

In YAML, spaces(indent) are used to indicate nesting (**tab** is not recommended.). When we want to specify the output function `pdf_document(toc = TRUE)`, we need to nest it under the `output` field. We also need to nest `toc` under `pdf_document` so that it gets passed to that function correctly.

```
---
output:
  pdf_document:
    toc: true
---
```

In R, the equivalent structure is a nested list, each with a name: `list(output = list(pdf_document = list(toc = TRUE)))`. Similarly, you can call this in R Markdown using the metadata object, e.g. `metadata$output$pdf_document$toc`. The hierarchical structure (which you can see with `draw_yaml_tree()`) looks like this:

```
output:
  pdf_document:
    toc: true
```

Without the extra indents, YAML doesn't know `toc` is connected to `pdf_document` and thinks the value of `pdf_document` is `NULL`. YAML that looks like this:

```
output:
  pdf_document:
toc: true

output:
  pdf_document: null
toc: true
```

Some YAML fields take unnamed vectors as their value. You can specify an element of the vector by adding a new line and `-` (note that the values can be indented or not below category here).

```
category:
- R
- Reproducible Research
```

## quote and R code

You may have noticed that strings in YAML don't always need to be quoted. However, it can be useful to explicitly wrap strings in quotes when they contain special characters like `:` and `@`.

```
title: 'R Markdown: An Introduction'
```

R code can be written as inline expressions ``r expr``. R code in `params` needs to be slightly different: use `!r`(e.g. `!r expr`) to call an R object.

```
author: 'liang'
params:
  date: !r Sys.Date()
```

## Basic setting metadata

### Top-level basic settings

These settings are based on the original `rmarkdown` package without any other associated packages.

Set Top-level Basic R Markdown YAML Fields. e.g.

```
---
title: "YAML metadata for R Markdown with examples"
subtitle: "YAML header"
author: Hao Liang
date: "2021-04-22"
output:
  md_document:
    toc: yes
    toc_depth: 2
abstract: YAML is a human-readable and easy to write language to define data structures.
keywords: ["YAML", "Rmd"]
subject: Medicine
description: Rmd makes it possible to use a YAML header to specify certain parameters right at the begin
category:
  - Rmd
  - Medicine
lang: "en-US"
---
```

These field is not available in all output formats. Each is available in:

field	html_document	pdf_document	word_document	odt_document	powerpoint_presentation
subtitle	:smiley:	:smiley:	:smiley:		
abstract	:smiley:	:smiley:			
keywords	:smiley:	:smiley:	:smiley:	:smiley:	:smiley:
subject	:smiley:	:smiley:	:smiley:	:smiley:	:smiley:
description			:smiley:	:smiley:	:smiley:
category			:smiley:		:smiley:
lang	:smiley:	:smiley:	:smiley:	:smiley:	:smiley:

The document language using IETF language tags such as “en” or “en-US.” The language subtag lookup tool can help find the appropriate tag.

Certain R Markdown templates will allow you to specify additional parameters directly within the YAML. For example, the Distill output format allows `url`, `affiliation`, and `affiliation_url` to be specified. After you install the `distill` package. You can see the corresponding section in this tutorial (still updating).

```
---
title: "Distill for R Markdown"
author:
  - name: "JJ Allaire"
    url: https://github.com/jjallaire
    affiliation: RStudio
    affiliation_url: https://www.rstudio.com
```

```
output: distill::distill_article
---
```

## output

The `output` field of YAML is very important for R Markdown. The `rmarkdown` package contains a lot of output formats for different use.

Source: <https://rmarkdown.rstudio.com/lesson-9.html>

```
---
output: html_notebook
---
```

The `rmarkdown` package/ Rmd natively support the following formats:

- `html_notebook`
- `html_document`
- `pdf_document`
- `word_document`
- `odt_document`
- `rtf_document`
- `md_document`
- `ioslides_presentation`
- `beamer_presentation`
- `powerpoint_presentation`
- `html_vignette`

If you use one output format without additional arguments, the value of output can simply be the name of the function.

```
---
output: html_document
---
```

However, if you're specifying more than one output type, you must use the nesting syntax. If you don't want to include additional arguments, use "default" as the function's value.

```
---
output:
  html_document: default
  pdf_document: default
---
```

## toc

`toc` is the sub-level option of any output formats. You can add a table of contents (TOC) using the `toc` option and specify the depth of headers that it applies to using the `toc_depth` option(Xie 2018). For example:

```

---
title: "Habits"
output:
  html_document:
    toc: true
    toc_depth: 2
    toc_float: # invalid for other output formats of non-html
      collapsed: false
      smooth_scroll: false
---

```

## advanced options for html and pdf

R Markdown stands on the shoulders of **knitr** and Pandoc(Xie, Dervieux, and Riederer 2020). html and pdf are the most common formats outputted by R Markdown, most other formats are also transformed from them. From the figure below, we clearly see the difference for generating html and pdf. .md files can be directly converted to html, but md -> pdf is time-consuming and depends on tex(R Markdown documents are converted to PDF by first converting to a TeX file and then calling the LaTeX engine to convert to PDF. ). So the options for these two formats are not always compatible.

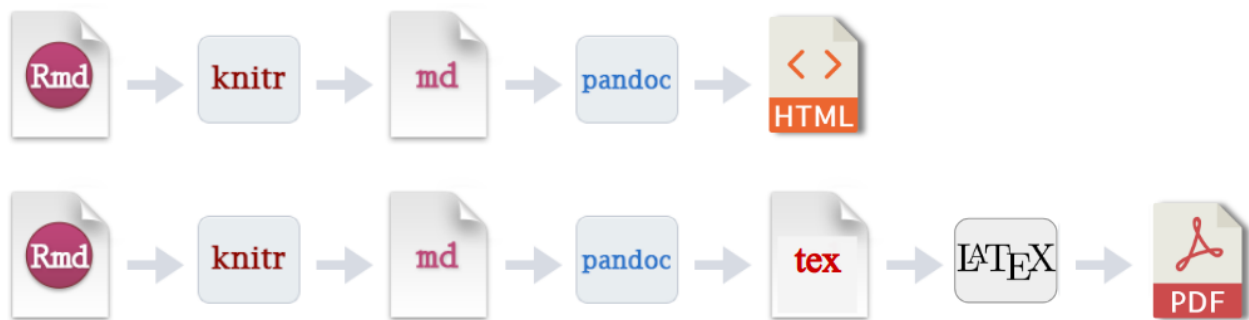


Figure 1: source:<https://yongfu.name/2019-fju-rmd-talk/slide/#1>

## html

html full YAML example:

```

---
output:
  html_document:
    code_folding: hide #choose to hide/show code blocks initially.
    number_sections: true # add section numbering to headers
    theme: united # Bootstrap theme (themes are drawn from the Bootswatch theme library)
    highlight: tango #specifies the syntax highlighting style
    css: styles.css # custom CSS ( set the theme and potentially highlight to null)
    fig_width: 7 # Figure options
    fig_height: 6
    fig_caption: true
    df_print: paged # tables are printed as HTML tables with support for pagination
    self_contained: false # keep dependencies in external files
    keep_md: true # keep a copy of the Markdown file

```

```

includes:
  in_header: header.html # inject CSS and JavaScript code into the <head> tag
  before_body: doc_prefix.html # include a header that shows a banner or logo.
  after_body: doc_suffix.html # include a footer
template: template.html # custom templates
md_extensions: -autolink_bare_uris+hard_line_breaks # preface an option with '-' to disable and '+'
---
```

## pdf

pdf full YAML example for output:

```

---
output:
  pdf_document:
    toc: true
    number_sections: true
    fig_width: 7
    fig_height: 6
    fig_caption: true
    df_print: kable # print.data.frame(default)/kable/tibble
    highlight: tango
    latex_engine: xelatex # try to use xelatex as default
    keep_tex: true
    keep_tex: true
    template: template.tex
    includes:
      in_header: preamble.tex
      before_body: doc-prefix.tex
      after_body: doc-suffix.tex
---
```

## pdf top-level YAML example

Many aspects of the LaTeX template used to create PDF documents can be customized using top-level YAML metadata (note that these options do not appear underneath the output section, but rather appear at the top level along with title, author, and so on)(Xie 2018). For example:

```

---
output: pdf_document
fontsize: 11pt
geometry: margin=1in
documentclass: ctexart # usually one of the standard classes, article, book, and report
classoption:
  - twocolumn
  - landscape
linestretch: 2 # adjusts line spacing using the setspace package, e.g. 1.25, 1.5
indent: true # indent paragraphs
papersize: a4 # paper size, e.g. letter, a4
---
```

Consult the Pandoc manual for the full list to know more.



## header-includes:

Tex style and package loading can also put in `header-includes`.

```
---
output: pdf_document
header-includes:
- \usepackage{fancyhdr}
- \pagestyle{fancy}
- \usepackage{ctex} #TeX package for Chinese
- \fancyhead[L]{MANUSCRIPT AUTHORS}
- \fancyhead[R]{MANUSCRIPT SHORT TITLE}
- \usepackage{lineno} # TeX package for line numbers
- \linenumbers
---
```

To override or extend some CSS for just one document, include for example:

```
---
output: html_document
header-includes: |
<style>
blockquote {
  font-style: italic;
}
tr.even {
  background-color: #f0f0f0;
}
td, th {
  padding: 0.5em 2em 0.5em 0.5em;
}
tbody {
  border-bottom: none;
}
</style>
---
```

## Bibliographies and Citations

Source: [https://rmarkdown.rstudio.com/authoring\\_bibliographies\\_and\\_citations.html](https://rmarkdown.rstudio.com/authoring_bibliographies_and_citations.html)

Pandoc can automatically generate citations and a bibliography in a number of styles. In order to use this feature, you will need to specify a bibliography file using the `bibliography` and `style` metadata field.

By default, pandoc will use a Chicago author-date format for citations and references. To use another style, you will need to specify a CSL 1.0 style file in the `csl` metadata field. A repository of CSL styles can be found at <https://github.com/citation-style-language/styles> or <http://zotero.org/styles>.

For example:

```
---
title: "Sample Document"
output: html_document
bibliography: bibliography.json
---
```

```
cs1: biomed-central.csl
---
```

By default, citations are generated by the utility pandoc-citeproc, and it works for all output formats. When the output is LaTeX/PDF, you can also use LaTeX packages (e.g. `natbib` or `biblatex`) to generate citations

```
---
output:
  pdf_document:
    citation_package: natbib
---
```

## Chinese/Japanese support

html natively support Chinese characters. However, Rmd -> pdf is need more options to display Chinese or Japanese...

There are two ways.

1.includes and header.tex

```
---
output:
  pdf_document:
    includes:
      in_header: header.tex
---
```

header.tex

```
\usepackage{xCJK}
\setCJKmainfont{Noto Sans CJK SC}
```

2.header-includes

use `header-includes` for Chinese document.

```
---
output: pdf_document
header-includes:
  - \usepackage{ctex}
---
```

## parameters and arguments

### params

Source: <https://www.r-bloggers.com/2019/03/using-parameters-in-rmarkdown/>

You can include a `params` section in the YAML header at the top and include variables as key-value pairs:

```

---
params:
  hashtag: "#amca19"
  max_n: 18000
  timezone: "US/Eastern"
title: "Twitter Coverage of "
author: "Neil Saunders"
date: "2021-04-22 18:57:15"
output:
  github_document
---

```

Then, wherever you want to include the value for the variable named `hashtag`, simply use `params$hashtag`, as in the title shown here or in later code chunks or inline R code. e.g.

The data number reach ``r params$max_n``

## Pandoc arguments

Some options are passed to Pandoc, such as `toc`, `toc_depth`, and `number_sections`. You should consult the Pandoc documentation when in doubt. R Markdown output format functions often have a `pandoc_args` argument, which should be a character vector of extra arguments to be passed to Pandoc. If you find any Pandoc features that are not represented by the output format arguments, you may use this ultimate argument. If the argument is document metadata, you can set it with first-level YAML metadata. e.g.,

```

---
output:
  word_document:
    toc: true
toc-title: "test for document metadata"
---

```

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## test for document metadata

YAML metadata (header) in R Markdown	2
Useful websites	2
useful tools	2

You can also visit Pandoc document to see more arguments

Or passed it in with the `-M` command-line flag.

```

---
output:
  word_document:
    toc: true
    pandoc_args: [
      "-M", "toc-title=test for document metadata"
    ]
---

```

## shared options

If you want to specify a set of default options to be shared by multiple documents within a directory, you can include a file named `_output.yml` within the directory. Note that no YAML delimiters (`---`) or the enclosing `output` field are used in this file. For example:

```

html_document:
  self_contained: false
  theme: united
  highlight: textmate

```

## Future work

We will continue to summarize the YAML options of related packages (e.g. `distill`, `rticles`, `bookdown`, `rmdformats` )

## References

- Barrett, Malcolm, and Richard Iannone. 2021. *Ymlthis: Write 'YAML' for 'r Markdown', 'Bookdown', 'Blogdown', and More*. <https://CRAN.R-project.org/package=ymlthis>.
- Xie, Yihui. 2018. *R Markdown: The Definitive Guide*. <https://doi.org/10.1201/9781138359444>.
- Xie, Yihui, Christophe Dervieux, and Emily Riederer. 2020. *R Markdown Cookbook*. <https://doi.org/10.1201/9781003097471>.