Enhancing collaboration and reproducibility...

... using GitHub and distributed version control

Jay Brodeur | <u>brodeujj@mcmaster.ca</u> Portage Webinar | 2020-10-06 McMaster University sits on the traditional Territories of the Mississauga and Haudenosaunee Nations, and within the lands protected by the "Dish With One Spoon" wampum agreement

(Indigenous Education Council, May 2016).

Learning objectives

At the completion of this webinar, you should be able to:

- Explain the purpose and general function of version control systems
- Apply a variety of tools (git, GitHub, GitHub Desktop) to manage file versions within a *repository*
- Apply best practices for efficiently managing and sharing repositories
- Describe how systems like GitHub can be used to support research collaboration and transparency
- Identify opportunities to implement these tools & practices to support research in your group or organization

But first ...

A few questions for you

Generally, I'm interested in learning about





Strongly agree



My familiarity with version control with git & GitHub





I have heck ome of these





0 I should probably be giving this webinar!



In the past, I have you used GitHub to ...









Outline

Version control systems - types and value

Basic workflows in git and GitHub

Managing collaboration, access, & sharing

Sharing results: Markup and presentation

Administrative tools

Version control systems (and why you might need them)

Local version control

my-research/

readme.txt

↓ data/

↓ trial1results.csv

↓ t1analysis.py

Local version control (the hard way!)

my-research/

readme.txt

↓ data/

↓ t1analysis.py

сору

↓ t1analysis-2018-11-06.py



Local version control (the hard way!)

my-research/

readme.txt

↓ data/

↓ trial1results.csv

scripts/

↓ t1analysis.py

сору

my-research-2018-11-06/ readme.txt ↓ data/

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- - ↓ t1analysis.py

↓ t1analysis-2018-11-06.py



↓ t1analysis-2018-11-08.py

copy



my-research-2018-11-08/ readme.txt

- ⊾ data/
 - ↓ trial1results.csv
- scripts/
 scripts
 scripts
 script
 script
 - ↓ t1analysis.py
 - ↓ t2analysis.py

Local version control

You can track versions manually! BUT, it's prone to errors:

- Writing to the wrong file/folder
- Overwritten files
- Misnamed (or poorly named) files
- "I just keep forgetting to do it"
- "Which old version is the correct one?"

ocation: 😂 C:\user\research\data			~
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Local version control

Database system records changes to files and folders over time

Benefits: Can be mostly automated; consistent and dependable; traceability

Challenges: Not conducive to collaboration; local system failure could lead to data loss



Centralized version control

Central (remote) database records changes from multiple local users

Users 'check out' a version they are working on.

Benefits: Allows for collaboration & granular permissions

Challenges: Can get 'locked out' or lose access altogether during outages



Distributed version control

Clients (users) *clone* the entire repository locally

Clients work locally; *push* changes to the server

Changes managed and *merged* at the server

Clients pull new changes

Benefits:

- Collaboration & concurrent development
- Granular permission
- No single point of failure



Why use distributed version control?

Distributed version control software allows you (and your collaborators) to:

- Track, compare, and revert changes (more quickly and granularly)
- Enable and manage collaborative development
- Deal with challenges of scale (# files, # changes, # collaborators)
- Share materials (openly or controlled); allow collaboration and reuse
- Backup your work to an external repository

Use it to manage:

- Software / code Openrefine: <u>github.com/OpenRefine/OpenRefine</u>
- **Datasets** OpenIndexMaps: <u>github.com/OpenIndexMaps</u>
- **Documentation** DCN data curation primers: <u>github.com/DataCurationNetwork/data-primers</u>
- **Books** Git from the Bottom Up:<u>github.com/jwiegley/git-from-the-bottom-up</u>
- Websites UBC Research Commons' intro to git: <u>ubc-library-rc.github.io/intro-git/</u>

git is a free and open source *distributed version control system* to handle everything from small to very large projects with speed and efficiency.



GitHub is a web-based hosting service for version control using git. It offers all of the distributed version control and source code management functionality of git as well as additional features.

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	MonitoringTools	updated URL for checking	2 years ago	Releases
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Basic workflows in git and GitHub

1. *Initialize* or *clone* a *repository* (in git)

A *repository (repo)* is a set of files/directories managed with a VCS

Initialize git to create a new local repo in a selected directory
(with or without files)
\$ cd C:/Local/my-repo

\$ git init

OR

Clone an existing repo (e.g from GitHub) to your local system
\$ git clone https://github.com/username/my-repo.git

Tip: Create a readme.md and LICENSE file in the top directory

> These become your repo's readme file and license



2. Do your work

Create and edit files and folders

NOTE: Changes aren't tracked until you take a snapshot of them.



3. Add or update files (in git)

Add: tell git to begin keeping track of a file and its versions

- \$ git add README.md
- \$ git add --all
- \$ git add *.py

Update: tell git to take note of the changes that has been made to a file (staging)

\$ git add -u





4. Commit changes (in git)

Commit: tell git to take a snapshot of all staged (changed) files (while keeping old snapshots):

- \$ git commit -m "Title" -m "Description....."
 - Add a short comment and a longer description

Add and commit at once with:

\$ git commit -a -m "Title"







What Now?

5a. Continue to work, add + commit

5b. Make a new *branch* to allow separate development

Clones the *main/master branch* (but tracked in the same git) Allows separate development without breaking what's in place New branch can be later *merged* into the *main/master* one



5c. *Push* changes to a remote repository (e.g. GitHub)

Push: send modified files (and git database and associated metadata) to a remote repository (e.g. GitHub, or another hosted repository)

- Disseminate & share
- Enable others to modify / contribute to your work
- Manage contributions; decide what gets merged
- Merge changes & control development



In GitHub



Use the web interface to:

create / clone repository (with readme)

🗲 upload, edit etc.



🗲 branch + merge

In GitHub Desktop

Current repository DASH-githubpages		P Current branch master	 Fetch origin Last fetched 5 minutes ago
An updated version of Gi	Hub Desktop is available and	will be installed at th	e next launch. See what's new or restart GitHub Desktop.
Changes (2)	History	README.md	
2 change	d files		00 -1,2 +1,9 00
docs\index.md	۰	1 2	# DASH-gitpages Material for the DASH workshop "Fasy websites with GitHub Pages and Markdown"
READING IN			<pre>** This repository contains workshop files, as well as files used to create the <u>inc</u> ckking.meknage[https://jasonbrodur.github.io/GKSH-githubpages/) with Github Pages * * *Created and presented by Jay Brodeur, RKMatter University Library * * All content is made available under a Creative Commons 4.0 Attribution license. @#</pre>
Summary (required) Description	master		

GitHub Desktop is a desktop

application for local version control and interaction with GitHub using a GUI.

Managing collaboration, access, & sharing with GitHub



Use the web interface to:

→ create / clone a repository

- Create name and description
- Set visibility
- Add README, .gitignore, license
- upload, edit etc.
 add + commit
 branch + merge

Repository template Start your repository with a	template repository's contents.	
No template -		
Owner *	Repository name *	
🥚 jasonbrodeur 🗸	/ research-repo	~
Description (optional)		
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Managing repository visibility

Set at creation or anytime in >Settings

Options:

- Public to everyone
- Private to collaborators / teams
 - Added private features with upgrade to paid account / organization

Change repository visibility	×
▲ Warning: this is a potentially destructive action.	
	 from a GitHub repository.
Make public This repository is currently public.	ages for this repository. Learn more.
Make private Hide this repository from the public.	
 You will permanently lose: 	
 All stars and watchers of this repository. 	anch. Learn more.
 All pages published from this repository. 	
• You can upgrade your plan to also avoid losing access to:	
 Codeowners functionality. 	- I
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Adding a license

Created in the LICENSE file in the top-level of the repository

Built-in license selector (or add your own)

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Managing collaborators on a personal repository

Collaborators can be added to both public and private repositories

For *personal repositories* (owned by a user), collaborators have only one set of privileges

- Can push, pull (read), and fork
- Manage pull requests, wikis, releases, etc.

More granular permissions are available for repositories owned by *organizations*

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Managing access with organizations and teams

Organizations are shared accounts for projects

Benefits:

- Shared ownership of (unlimited) repositories
- Top-level management of repositories
- Unlimited membership
- Range of roles and permissions
- Nested *teams* with cascading access
- Two-factor authentication
- Are free to create



Managing access with organizations and teams



Packaging and releasing repositories

A release is a tagged snapshot of a repository for deploying a discrete version to broader audiences.

Releases are used when:

- Deploying software packages
- Packaging as supplemental materials (e.g. supporting a publication)
- Archiving in data / code repositories



An Example - Archiving in Zenodo

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Ashley Wolf, Asaf Ary, & Hossein Firooz. (2020, August 12). Yahoo Knowledge Graph COVID-19 Datasets (Version 8-08-2020). Zenodo. <u>http://doi.org/10.5281/zenodo.3981432</u> Main repo: <u>https://github.com/yahoo/covid-19-data</u> Release (forked):

https://github.com/rexdouglass/covid-19-data/tree/8-08-2020

Communication & collaboration tools - Pull requests

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Image credit: <u>GitHub guides</u>

Communication & collaboration tools - Pull requests

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Communication & collaboration tools - Project Boards

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Image credit: GitHub blog

Communication & collaboration tools - Wikis

🖵 jasonbrod

Jasonbrodeur / research-repo		 Unwat 	tch \checkmark 3 \swarrow Star 0 \bigtriangledown Fork 0		
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Image credit: GitHub blog

Markup and presentation GitHub as the medium

Example: GitHub repository as a preprint

paezha / covid19-environmental-correlates						
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README_cache/gfm	Updated README.Rmd after acceptance by Geographical Analysis	5 months ago				
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README.md	paezha Antonio Paez tatianedemenezes					
A spatio-temporal correlates of COVI	Languages					
Antonio Paez (McMaster University)	 HTML 97.6% TeX 2.1% R 0.3% 					

Paez, A., López, F., Menezes, T., Cavalcanti, R., Pitta M.G.R., 2020. A Spatio-Temporal Analysis of the Environmental Correlates of COVID-19 Incidence in Spain, Geographical Analysis https://github.com/paezha/covid19-environmental-correlates

Markdown in GitHub



- A very lightweight markup language used by GitHub (and Reddit, and Trello)
- Improves formatting while leaving the plain document readable.
- Mostly just regular text with a few non-alphabetic characters thrown in



This is a heading I am making these words bold Here is a list • Of things • And stuff

Rendered text

Learn more: https://guides.github.com/features/mastering-markdown/

Markdown

GitHub Pages

"**GitHub Pages** is a static site hosting service that takes HTML, CSS, and JavaScript files straight from a repository on GitHub, optionally runs the files through a build process, and publishes a website."

GitHub pages also allows you to create webpages from markdown files, using a built-in software called jekyll.

tHub Pages is designed to	o host your persona	al, organization	or project pages from a	a GitHub repository.	
Source					
GitHub Pages is currently	/ disabled. Select a	source below	enable GitHub Pages f	or this repository. Le	arn more.
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Administrative Tools To support research & teaching

GitHub Classroom



Tools to use GitHub for course management

- Manage students in an organization
- Create assignment repositories from templates
- Granular access management of submitted materials
- Automated management & grading



GitHub Campus Program



Provides Institutional-level access to **GitHub Enterprise Cloud**, which:

- Helps institutions manage collaboration and access (including SAML single sign on and 2FA)
- Allows unlimited organizations
- Access to GitHub Enterprise Support
- Offers premium features (such as continuous integration)
- Provides administrators a single point of visibility and management.

education.github.com/schools



And again ... One more question

I would be interested in learning more about...



How to cherry-pick select elements only from pull requests.	GitHub classroom	Actual implementation and training across a real research group for collaboration.
git on its own	command line vs. desktop github	Needed to be hands on
version control with GitHub	how to start using it ? for someone working in the domain of info literacy how do I use it?	moving repositories to an organization
Best practices for sharing/pulling/forking/pushing/etc.	More examples of team collaboration and the logistics eg. merge requests, plus best practices?	maybe how linking content to dissertations thesis or master
more depth each area to support actual implementation to support my research work for HQP	version control and developing software	Sample practical examples of pull, merge, branch, etc.
Data-driven model	Hands on would be great!	githob

I would be interested in learning more about...



A practical look at collaboration

"Case studies" - How academic research groups are currently using GitHub, and in particular what did GitHub replace for them? e.g. "we were using dropbox and just hack and bashing", etc. Also how the wiki feature works! Hands on would be good - specific topics - markdown, or gitpages etc.

Seconding more depth in each area. Mini-tutorials!

Integration with Jira and pull requests

upvoting case studies suggestion!

Hand on using github

Learn more

The Git Pro book: <u>https://git-scm.com/book/en/v2</u>

Introduction to GitHub: <u>https://lab.github.com/githubtraining/introduction-to-github</u>

GitHub Guides: <u>https://guides.github.com/</u>

UBC Library Research Commons - Intro to git and GitHub: https://ubc-library-rc.github.io/intro-git/

Getting started with GitHub Pages: <u>https://guides.github.com/features/pages/</u>

GitHub Classroom: <u>https://classroom.github.com/</u>

GitHub Campus Program: https://education.github.com/schools