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Introduction

Open source software (OSS) is typically created in a decentralized self-organizing process by a community of developers having the same or similar interests (see the famous essay by Raymond, 1999). A key factor for the success of OSS over the last two decades is the internet: Developers who rarely meet face-to-face can employ new means of communication, both for rapidly writing and deploying software (in the spirit of Linus Torvald’s “release early, release often paradigm”). Therefore, many tools emerged that assist a collaborative software development process, including in particular tools for source code management (SCM) and version control.

In the R world, SCM is not a new idea, in fact, the R Development Core Team has always been using SCM tools for the R sources; first by means of Concurrent Versions System (CVS, see Cederqvist et al., 2006), and then via Subversion (SVN, see Pilato et al., 2004). A central repository is hosted by ETH Zürich mainly for managing the development of the base R system. Mailing lists like R-help, R-devel and many others are currently the main communication channels in the R community.

Also beyond the base system, many R contributors employ SCM tools for managing their R packages, e.g., via web-based SVN repositories like SourceForge (http://SourceForge.net/) or Google Code (http://Code.Google.com/). However, there has been no central SCM repository providing services suited to the specific needs of R package developers. Since early 2007, the R-project offers such a central platform to the R community. R-Forge (http://R-Forge.R-project.org/) provides a set of tools for source code management and various web-based features. It aims to provide a platform for collaborative development of R packages as well as a quality management system similar to that of CRAN. Packages hosted on R-Forge are provided in source form as well as in binary form for Mac OSX and Windows and can be downloaded from the website of the corresponding project on R-Forge or installed directly in R via install.packages("foo", repos = "http://R-Forge.R-project.org").

On R-Forge, developers organize their work in so-called “Projects”. Every project has various tools and web-based features for software development, communciation and other services. All features mentioned in the following sections are accessible via so-called “Tabs”: e.g., user accounts can be managed in the My Page tab or a list of available projects can be displayed using the Project Tree tab.

Since starting the platform in early 2007, more and more interested users registered their projects on R-Forge. Now, after more than 1.5 years of development and testing, nearly 300 projects and around 800 users are registered on R-Forge. This and the steadily growing list of feature requests show that there is a high demand for centralized source code management tools and for releasing prototype code frequently among the R community.

In the next three sections, we summarize the core features of R-Forge and what R-Forge offers to the R community in terms of collaborative development of R-related software projects.

Source Code Management

When carrying out software projects, source files change over time, new files get created and old files deleted. Typically, several authors work on several computers on the same and/or different files and keeping track of every change can become a tedious
task. In the open source community, the general solution to this problem is to use version control, typically provided by the majority of SCM tools. For this reason R-Forge utilizes SVN to facilitate the developer’s work when creating software.

A central repository ensures that the developer always has access to the current version of the project’s source code. Any of the authorized collaborators can “checkout” or “update” the project file structure, make the necessary changes or additions, delete files from the current revision and finally “commit” changes or additions to the repository. More than that, SVN keeps track of the complete history of the project file structure. At any point in the development stage it is possible to go back to any stage in the history as well as to inspect and restore old files. This is called version control as every stage automatically is assigned a unique version number which increases over time.

On R-Forge such a version-controlled repository is automatically created for each project. To get started, the project members just have to install the client of their choice (e.g., Tortoise SVN on Windows or svnX on Mac OS) and check out the repository. In addition to the inherent backup of every version within the repository a backup of the whole repository is generated daily.

A rights management system assures that, by default, anonymous users have read access and developers have write access to the data associated with a certain project on R-Forge. More precisely, registered users can be granted one of several roles: e.g., the “Administrator” has all rights including the right to add new users to the project or release packages directly to CRAN. He/she is usually the package maintainer, the project leader or has registered the project originally. Other members of a project typically have either the role “Senior Developer” or “Junior Developer”, who are also permitted to commit to the project SVN repository and examine the log files in the R Packages tab. When we speak of developers in subsequent sections we refer to project members having the rights at least of a Junior Developer.

Release and Quality Management

Development versions of a software project are typically prototypes and are subject to many changes. Thus, R-Forge offers two tools which assist the developers in improving the quality of their source code.

First, it offers a quality management system similar to that of CRAN. Packages on R-Forge are checked in a standardized way on different platforms based on R CMD check. The resulting log files can be examined by the project developers so that they can improve the package to pass all tests on R-Forge and subsequently on CRAN.

Second, bug tracking systems allow users to notify package authors about problems they encounter.

In the spirit of OSS—given enough eyeballs, all bugs are shallow (Raymond, 1999)—peer code review leads to an overall improvement of the quality of software projects.

Additional Features

A number of further tools, of increased interest for larger projects, help developers to coordinate their work and to communicate with their user base. These tools include:

- Project websites: Developers may present their work on a subdomain of R-Forge, e.g., http://foo.R-Forge.R-project.org/), or via a link to an external website.
- Mailing lists: By default a list foo-commits@lists.R-Forge.R-project.org is automatically created for each project. Additional mailing lists can be set up easily.
- Project categorization: Administrators may categorize their project in several so-called “Trove Categories” in the Admin tab of their project (under Trove Categorization). For each category three different items can be selected. This enables users to quickly find what they are looking for using the Project Tree tab.
- News: Announcements and other information related to a project can be put on the project summary page as well as on the home page of R-Forge. The latter needs approval by one of the R-Forge administrators. All items are available as RSS feeds.
- Forums: Discussion forums can be set up separately by the project administrators.

How to Get Started

This section is intended to be a hands-on tutorial for new users. A more detailed guide to R-Forge with additional information is provided in the user’s manual (R-Forge Administration and Development Team, 2008).

After accessing the URL http://R-Forge.R-project.org/, one can

- login,
- register a user or a project,
- download the documentation,
- examine the latest news,
- go to a specific project website either by searching for available projects (top middle of the page), by clicking on one of the projects listed on the right, or by going through the listing in the Project Tree tab.
Registering Your Project

There are two possibilities to register a project: Clicking on Register Your Project on the top right of the home page leads to the corresponding registration form.

After submitting the completed form, an e-mail is sent to the given address containing a link for activating the account. Subsequently, all R-Forge features, including joining existing or creating new projects, are available to logged-in users.

Registering a New User

For using R-Forge as a developer, one has to register as a site user. A link on the main web site called New Account on the top right of the home page leads to the corresponding registration form.

Another tab named My Page leads registered users to their personal page.

Registering a Project

There are two possibilities to register a project: Clicking on Register Your Project on the home page or by going to the My Page tab and clicking on Register Project. Both links lead to a form which has to be filled out in order to finish the registration process. In the text field “Project Public Description” the registrant is supposed to enter a short and concise description of the project. This text will be shown in several places on R-Forge. The text entered in the field “Project Purpose And Summarization” is an additional information for the R-Forge administrators, inspected for approval. “Project Unix Name” refers to the name which uniquely determines the project. In case of a project that contains a single R package, the project Unix name typically corresponds to the package name (in its lower-case version). Restrictions according to the Unix file system convention force Unix names to be in lower case (and will be converted automatically if they are typed in upper case).

After the completed form was submitted, the project has to be approved by the R-Forge administrators and a confirmation e-mail is sent to the registrant upon approval. After that, the registrant automatically becomes the project administrator and the standardized web area of the project (http://R-Forge.R-project.org/projects/foo/) is immediately available on R-Forge. This web area includes a Summary page, an Admin tab visible only to the project administrators, and various other tabs depending on the features enabled for this project in the Admin tab. To present the new project to a broader community the name of the project additionally is promoted on the home page under “Recently Registered Projects”.

Furthermore, within an hour after approval a default mailing list and the project’s SVN repository containing a ‘README’ file and two pre-defined directories called ‘pkg’ and ‘www’ are created. The content in these directories is used by the R-Forge server for creating R packages and a project website, respectively.

SCM and R Packages

The first step after creation of a project is typically to start generation of content for one (or more) R package(s) in the ‘pkg’ directory. Developers can either start committing changes via SVN as usual or – if the package is already version-controlled somewhere else – the corresponding parts of the repository including the history can be migrated to R-Forge (see the user’s manual on how to do this).

The SCM tab of a project explains how the corresponding SVN repository located at svn://svn.R-Forge.R-project.org/svnroot/foo can be checked out. From this URL the sources are checked out either anonymously without write permission (enabled by default) or as developer using secure shell authentication (svn+ssh:// instead svn:///) with full access to the repository.

To make use of the package building and checking feature the package source code has to be put into the ‘pkg’ directory of the repository (i.e., ‘pkg/DESCRIPTION’ or ‘pkg/R’, ‘pkg/man’, etc.) or, alternatively, a subdirectory of ‘pkg’. The latter structure allows to have more than one package in a single project, e.g., if a project consists of the packages foo and bar, then the source code is located in ‘pkg/foo’ and ‘pkg/bar’, respectively.

R-Forge automatically examines the ‘pkg’ directory of every repository and builds the package sources as well as the package binaries on a daily basis for Mac OS X and Windows (if applicable). The package builds are provided in the R Packages tab for download or can be installed directly in R using install.packages("foo", repos="http://R-Forge.R-project.org"). Furthermore, in the R Packages tab developers can examine logs of the build and check process on different platforms.

To release a package to CRAN the project administrator clicks on Submit this package to CRAN in the R Packages tab. After confirmation that a message will be sent to CRAN@R-project.org the package is automatically copied to ftp://CRAN.R-project.org/incoming/.

Further Steps

A customized project website, accessible through http://foo.R-Forge.R-project.org/ where foo corresponds to the unix name of the project, is managed via the ‘www’ directory. The website gets updated every hour.
The changes made to the project can be examined by entering the corresponding standardized web area. On entry, the Summary page is shown. Here, one can

- examine the details about the project including a short description and a listing of the administrators and developers,
- follow a link leading to the (personal) project homepage,
- examine the latest news announcements (if available),
- go to other sections of the project like Forums, Tracker, Lists, R Packages, etc.
- follow the download link leading directly to the available packages of the project (i.e., the R Packages tab).

Furthermore, meta-information about a project can be supplied in the Admin tab via so-called “Trove Categorization”.

Recent and Future Developments

In this section, we briefly summarize the major milestones of R-Forge development since the first release and give an outlook to future developments.

Recently added features and major changes include:

- New defaults for freshly registered projects: Only the tabs Lists, SCM and R packages are enabled initially. Forums, Tracker and News can be activated separately (in order not to overwhelm new users with too many features) using Edit Public Info in the Admin tab of the project. Experienced users can decide which features they want and activate them.
- An enhanced structure in the SVN repository allowing multiple packages in a single project (see above).
- The R package RForgeTools (Theußl, 2008) contains platform-independent package building and quality management code used on the R-Forge servers.
- A modified News submit page offering two types of submissions: project-specific and global news. The latter need an approval by one of the R-Forge administrators (default: project-only submission).
- Circulation of SVN commit messages can be enabled in the SCM Admin tab by project administrators. The mailing list mentioned in the text field is used for delivering the SVN commit messages (default: off).
- Mailing list search facilities provided by the Swish-e engine which can be accessed via the List tab (private lists are not included in the search index).

Further features which are currently on the wish-list or under development include

- a Wiki,
- task management facilities, and
- a re-organized tracker more compatible to R package development.

For suggestions, problems, feature requests, and other questions regarding R-Forge please contact R-Forge@R-project.org.

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