# Counting reads with `summarizeOverlaps`

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## 1 Introduction

This vignette illustrates how reads mapped to a genome can be counted with `summarizeOverlaps`. Different "modes" of counting are provided to resolve reads that overlap multiple features. The built-in count modes are fashioned after the "Union", "IntersectionStrict", and "IntersectionNotEmpty" methods found in the HTSeq package by Simon Anders (see references).

## 2 A First Example

In this example reads are counted from a list of BAM files and returned in a matrix for use in further analysis such as those offered in *DESeq2* and *edgeR*.

```r
> library(GenomicAlignments)
> library(DESeq2)
> library(edgeR)
> fls <- list.files(system.file("extdata", package="GenomicAlignments"),
+                     recursive=TRUE, pattern="*.bam", full=TRUE)
> features <- GRanges(
+   seqnames = c(rep("chr2L", 4), rep("chr2R", 5), rep("chr3L", 2)),
+   ranges = IRanges(c(1000, 3000, 4000, 7000, 2000, 3000, 3600, 4000,

```
Counting reads with `summarizeOverlaps`

```r
+ 7500, 5000, 5400), width=c(rep(500, 3), 600, 900, 500, 300, 900, + 300, 500, 500)), ",",
+ group_id=c(rep("A", 4), rep("B", 5), rep("C", 2)))
> olap <- summarizeOverlaps(features, fls)
> deseq <- DESeqDataSet(olap, design= ~ 1)
> edger <- DGEList(assay(olap), group=rownames(colData(olap)))
```

By default, the `summarizeOverlaps` function iterates through files in 'chunks' and with files processed in parallel. For finer-grain control over memory consumption, use the `BamFileList` function and specify the `yieldSize` argument (e.g., `yieldSize=1000000`) to determine the size of each 'chunk' (smaller chunks consume less memory, but are a little less efficient to process). For controlling the number of processors in use, use `BiocParallel::register` to use an appropriate back-end, e.g., in Linux or Mac to process on 6 cores of a single machine use `register(MulticoreParam(workers=6))`; see the `BiocParallel` vignette for further details.

## 3 Counting Modes

The modes of "Union", "IntersectionStrict" and "IntersectionNotEmpty" provide different approaches to resolving reads that overlap multiple features. Figure 1 illustrates how both simple and gapped reads are handled by the modes. Note that a read is counted a maximum of once; there is no double counting. For additional detail on the counting modes see the `summarizeOverlaps` man page.
Counting reads with `summarizeOverlaps`

<table>
<thead>
<tr>
<th>Union</th>
<th>IntersectionStrict</th>
<th>IntersectionNotEmpty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feature I</td>
<td>Feature I</td>
<td>Feature I</td>
</tr>
<tr>
<td>Feature I</td>
<td>No hit</td>
<td>Feature I</td>
</tr>
<tr>
<td>Feature I</td>
<td>No hit</td>
<td>Feature I</td>
</tr>
<tr>
<td>Feature I</td>
<td>Feature I</td>
<td>Feature I</td>
</tr>
<tr>
<td>Feature I</td>
<td>Feature I</td>
<td>Feature I</td>
</tr>
<tr>
<td>No hit</td>
<td>Feature I</td>
<td>Feature I</td>
</tr>
<tr>
<td>No hit</td>
<td>No hit</td>
<td>No hit</td>
</tr>
</tbody>
</table>

* Picture reproduced from HTSeq web site: http://www-huber.embl.de/users/anders/HTSeq/doc/count.html

**Figure 1:** Counting Modes

### 4 Counting Features

Features can be exons, transcripts, genes or any region of interest. The number of ranges that define a single feature is specified in the `features` argument.

When annotation regions of interest are defined by a single range a `GRanges` should be used as the `features` argument. With a `GRanges` it is assumed that each row (i.e., each range) represents a distinct feature. If `features` was a `GRanges` of exons, the result would be counts per exon.
Counting reads with `summarizeOverlaps`

When the region of interest is defined by one or more ranges the `features` argument should be a `GRangesList`. In practice this could be a list of exons by gene or transcripts by gene or other similar relationships. The count result will be the same length as the `GRangesList`. For a list of exons by genes, the result would be counts per gene.

The combination of defining the features as either `GRanges` or `GRangesList` and choosing a counting mode controls how `summarizeOverlaps` assigns hits. Regardless of the mode chosen, each read is assigned to at most a single feature. These options are intended to provide flexibility in defining different biological problems.

This next example demonstrates how the same read can be counted differently depending on how the `features` argument is specified. We use a single read that overlaps two ranges, gr1 and gr2.

```r
> rd <- GAlignments(names="a", seqnames="chr1", pos=100, cigar="300M", strand="+")
> gr1 <- GRanges("chr1", IRanges(start=50, width=150), strand="+")
> gr2 <- GRanges("chr1", IRanges(start=350, width=150), strand="+")
```

When provided as a `GRanges` both gr1 and gr2 are considered distinct features. In this case none of the modes count the read as a hit. Mode `Union` discards the read because more than 1 feature is overlapped. `IntersectionStrict` requires the read to fall completely within a feature which is not the case for either gr1 or gr2. `IntersectionNotEmpty` requires the read to overlap a single unique disjoint region of the `features`. In this case gr1 and gr2 do not overlap so each range is considered a unique disjoint region. However, the read overlaps both gr1 and gr2 so a decision cannot be made and the read is discarded.

```r
> gr <- c(gr1, gr2)
> data.frame(union = assay(summarizeOverlaps(gr, rd)),
+           intStrict = assay(summarizeOverlaps(gr, rd,
+                                mode="IntersectionStrict")),
+           intNotEmpty = assay(summarizeOverlaps(gr, rd,
+                                mode="IntersectionNotEmpty")))

     reads reads.1 reads.2
   1:     1       0       0
   2:     0       0       0
```

Next we count with `features` as a `GRangesList`; this is list of length 1 with 2 elements. Modes `Union` and `IntersectionNotEmpty` both count the read for the single feature.

```r
> grl <- GRangesList(c(gr1, gr2))
> data.frame(union = assay(summarizeOverlaps(grl, rd)),
+            intStrict = assay(summarizeOverlaps(grl, rd,
+                                            mode="IntersectionStrict")),
+            intNotEmpty = assay(summarizeOverlaps(grl, rd,
+                                               mode="IntersectionNotEmpty")))

     reads reads.1 reads.2
   1:     1       0       1
   2:     0       0       0
```

In this more complicated example we have 7 reads, 5 are simple and 2 have gaps in the CIGAR. There are 12 ranges that will serve as the `features`.

```r
> features <- GRanges(
Counting reads with `summarizeOverlaps`

```r
+ seqnames = c("chr1", "chr2", "chr1", "chr1", "chr2", "chr2",
+ "chr1", "chr2", "chr2", "chr1", "chr1"),
+ strand = Rle(strand("+"); length(group_id)),
+ ranges = IRanges(
+ start=c(1000, 2000, 3000, 3600, 7000, 7500, 4000, 4000, 3000, 3350, 5000, 5400),
+ width=c(500, 900, 500, 300, 600, 300, 500, 900, 150, 200, 500, 500)),
+ DataFrame(group_id)
+ )
> reads <- GAlignments(
+ names = c("a","b","c","d","e","f","g"),
+ seqnames = Rle(c(rep(c("chr1", "chr2"), 3), "chr1")),
+ pos = c(1400, 2700, 3400, 7100, 4000, 3100, 5200),
+ cigar = c("500M", "100M", "300M", "500M", "300M", "50M200N50M", "50M150N50M"),
+ strand = Rle(strand("+"), 7))
>
Using a `GRanges` as the `features` all 12 ranges are considered to be different features and
counts are produced for each row,

```r
> data.frame(union = assay(summarizeOverlaps(features, reads)),
+ intStrict = assay(summarizeOverlaps(features, reads,
+ mode="IntersectionStrict")),
+ intNotEmpty = assay(summarizeOverlaps(features, reads,
+ mode="IntersectionNotEmpty")))
```

```r
reads reads.1 reads.2
1 1 0 1
2 1 1 1
3 0 0 0
4 0 0 0
5 0 1 1
6 0 0 0
7 0 0 0
8 0 0 0
9 0 0 0
10 0 0 0
11 0 1 1
12 0 0 0
```

When the data are split by group to create a `GRangesList` the highest list-levels are treated
as different features and the multiple list elements are considered part of the same features.
Counts are returned for each group.

```r
> lst <- split(features, mcols(features)["group_id"])
> length(lst)
[1] 8
```

```r
> data.frame(union = assay(summarizeOverlaps(lst, reads)),
+ intStrict = assay(summarizeOverlaps(lst, reads,
+ mode="IntersectionStrict")),
+ intNotEmpty = assay(summarizeOverlaps(lst, reads,
+ mode="IntersectionNotEmpty")))
```
Counting reads with `summarizeOverlaps`

<table>
<thead>
<tr>
<th></th>
<th>reads</th>
<th>reads.1</th>
<th>reads.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>B</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>C</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>D</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>E</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>F</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>G</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>H</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

If desired, users can supply their own counting function as the `mode` argument and take advantage of the infrastructure for counting over multiple BAM files and parsing the results into a `RangedSummarizedExperiment` object. See `?BamViews-class` or `?BamFile-class` in the `Rsamtools` package.

## 5 pasilla Data

In this exercise, we count the pasilla data by gene and by transcript then create a `DESeqDataSet` object. This object can be used in differential expression methods offered in the `DESeq2` package.

### 5.1 source files

Files are available through NCBI Gene Expression Omnibus (GEO), accession number GSE18508. [http://www.ncbi.nlm.nih.gov/projects/geo/query/acc.cgi?acc=GSE18508](http://www.ncbi.nlm.nih.gov/projects/geo/query/acc.cgi?acc=GSE18508). SAM files can be converted to BAM with the `asBam` function in the `Rsamtools` package. Of the seven files available, 3 are single-reads and 4 are paired-end. Smaller versions of untreated1 (single-end) and untreated2 (paired-end) have been made available in the `pasillaBamSubset` package. This subset includes chromosome 4 only.

`summarizeOverlaps` is capable of counting paired-end reads in both a `BamFile`-method (set argument `singleEnd=TRUE`) or a `GAlignmentPairs`-method. For this example, we use the 3 single-end read files,

- `treated1.bam`
- `untreated1.bam`
- `untreated2.bam`

Annotations are retrieved as a GTF file from the ENSEMBL web site. We download the file to our local disk, then use `Rtracklayer`'s `import` function to parse the file to a `GRanges` instance.

```r
> library(rtracklayer)
+ "gtf/drosophila_melanogaster",
+ "Drosophila_melanogaster.BDGP5.25.62.gtf.gz")
> gffFile <- file.path(tempdir(), basename(fl))
> download.file(fl, gffFile)
> gff0 <- import(gffFile)
```

Subset on the protein-coding, exon regions of chromosome 4 and split by gene id.
Counting reads with `summarizeOverlaps`

```r
> idx <- mcols(gff0)$source == "protein_coding" &
+   mcols(gff0)$type == "exon" &
+   seqnames(gff0) == "4"
> gff <- gff0[idx]
> ## adjust seqnames to match Bam files
> seqlevels(gff) <- paste("chr", seqlevels(gff), sep="")
> chr4genes <- split(gff, mcols(gff)$gene_id)
```

### 5.2 counting

The `param` argument can be used to subset the reads in the bam file on characteristics such as position, unmapped or paired-end reads. Quality scores or the "NH" tag, which identifies reads with multiple mappings, can be included as metadata columns for further subsetting. See `?ScanBamParam` for details about specifying the `param` argument.

```r
> param <- ScanBamParam(
+   what='qual',
+   which=GRanges("chr4", IRanges(1, 1e6)),
+   flag=scanBamFlag(isUnmappedQuery=FALSE, isPaired=NA),
+   tag="NH")
```

We use `summarizeOverlaps` to count with the default mode of "Union". If a `param` argument is not included all reads from the BAM file are counted.

```r
> fls <- c("treated1.bam", "untreated1.bam", "untreated2.bam")
> path <- "pathToBAMFiles"
> bamlst <- BamFileList(fls)
> genehits <- summarizeOverlaps(chr4genes, bamlst, mode="Union")
```

A `CountDataSet` is constructed from the counts and experiment data in `pasilla`.

```r
> expdata <- MIAME(
+   name="pasilla knockdown",
+   lab="Genetics and Developmental Biology, University of Connecticut Health Center",
+   contact="Dr. Brenton Graveley",
+   title="modENCODE Drosophila pasilla RNA Binding Protein RNAi knockdown RNA-Seq Studies",
+   PubMedIds="20921232",
+   abstract="RNA-seq of 3 biological replicates of from the Drosophila melanogaster S2-DRSC cells that have been RNAi depleted of mRNAs encoding pasilla, a mRNA binding protein and 4 biological replicates of the the untreated cell line.")
> design <- data.frame(
+   condition=c("treated", "untreated", "untreated"),
+   replicate=c(1,1,2),
+   type=rep("single-read", 3),
+   countfiles=path(colData(genehits)[,1]), stringsAsFactors=TRUE)
> geneCDS <- DESeqDataSet(genehits, design=design, metadata=list(expdata=expdata))
```
Counting reads with `summarizeOverlaps`

If the primary interest is to count by transcript instead of by gene, the annotation file can be split on transcript id.

```r
> chr4tx <- split(gff, mcols(gff)$transcript_id)
> txhits <- summarizeOverlaps(chr4tx, bamlst)
> txCDS <- DESeqDataSet(txhits, design=design, metadata=list(expdata=expdata))
```

6 References

http://www-huber.embl.de/users/anders/HTSeq/doc/overview.html
http://www-huber.embl.de/users/anders/HTSeq/doc/count.html