

# Holding Pen and Workflows

Living the curator's dream!

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# **Users and Developers: A love story**

"Everything I do, I do it for you."

- Bryan Adams (Wannabe Invenio Developer)

#### What about the curators?



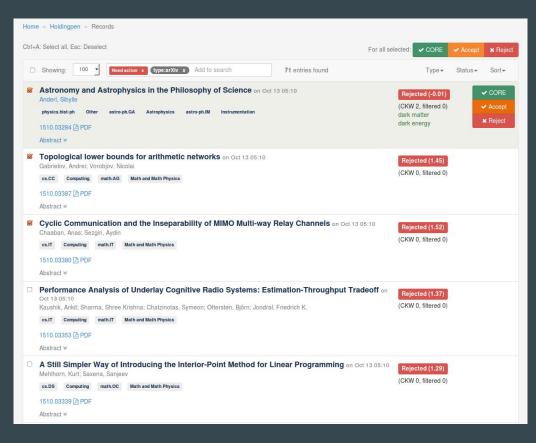
- Doing the awesome job of selecting / filtering content.
- Selection process is crucial (InspireHEP != Google Scholar)
- Documents need to be RELEVANT!

# There's an app for that! (No, seriously!)



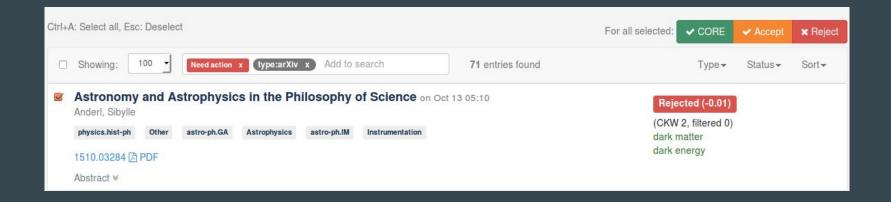
Introducing... Holding Pen!

#### What is this all about?



- Search / filter information
- Sorting readily available
- Intuitive interface
- Hotkeys
- Curator actions

#### **Goodies: Customizations**



### **Goodies: Customizations**

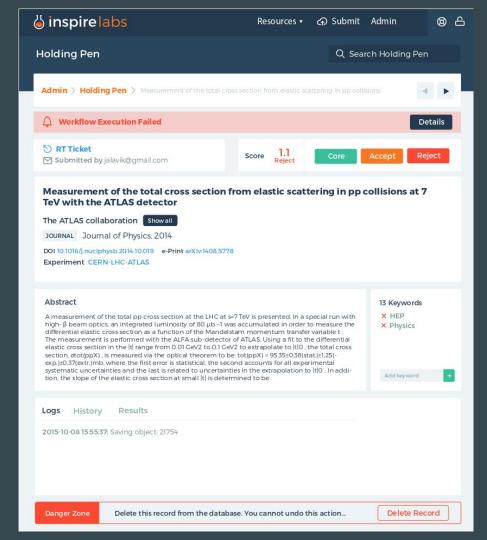


- Easy to the eye
- Faster selection process
- Extraction of CORE keywords (bibclassify, RDF-based)

# **Goodies: Detailed Page**

- Integration with different templates and formats
- Site-specific information
- Quick edits

Bottom line: Power in your hands!



# What's behind all this?

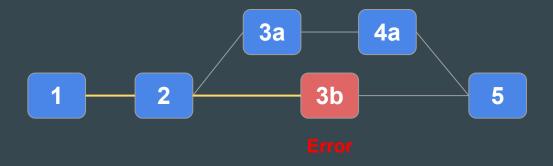
workflows...

#### **Under the hood - workflows**



- State aware workflow
- Data stored in database
- Sequential execution

#### Under the hood - errors in workflows



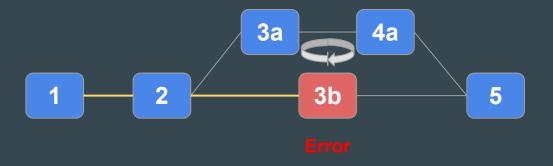
- Error state stored
- Stacktrace logged and stored
- Visible in Holding Pen

Error occurred

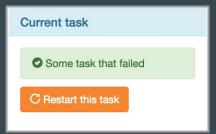
convert\_record\_with\_repository

Open details

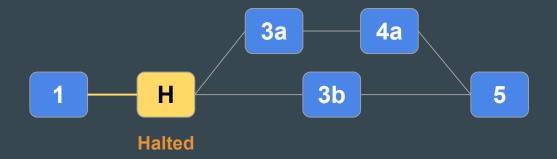
#### Under the hood - errors in workflows



- Fix error
- Deploy fix/Update data
- Restart task (e.g. via Holding Pen)

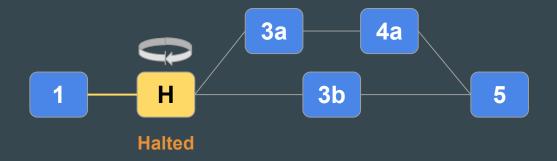


#### **Under the hood - halted workflows**



- Halted state stored
- Visible in Holding Pen
- Involve user actions

#### **Under the hood - halted workflows**



- Can be restarted or skipped
- Respond to actions from Holding Pen

#### **Under the hood - halted workflows**



Final execution path

# Concrete submission code example

More details in this afternoon's hands-on

#### **Submission workflow - the code**

```
class article(SimpleRecordDeposition):
    """Literature deposit submission without approval."""
    workflow = [
        # Render form and wait for user to submit
        render form,
        # Process metadata from form to record model.
        process sip metadata,
        # Generate MARC
        finalize record sip,
        # Upload the marcxml
        upload record sip,
    . . .
```

# Submission workflow with approval

```
workflow = [
    halt for approval,
    workflow if(approved),
          # Generate MARC
          finalize_record_sip,
          # Upload the marcxml
          upload record sip,
    workflow else,
         some_task,
. . .
```

# **Holding Pen integration**

```
class article(SimpleRecordDeposition):
    workflow = [..]
    @staticmethod
    def get_title(obj):
        """Get the title."""
        return obj.data.get('title') or "No title found"

    @staticmethod
    def get_description(obj):
        """Get the description part."""
        # Do fancy stuff using data from the submission with templating etc.
        return render_template('some/template', **context)
```



### **Future plans**

Release new versions of workflow/invenio-workflows

Update UI/UX on demosite

Integrate workflow 2.0 (performance, error reporting, less complexity) (thanks @dset0x)

Simplify the ways to extend and interact with Holding Pen

#### Under the hood - the code

Thanks to:

workflow, invenio-workflows

https://github.com/inveniosoftware/workflow

https://github.com/inveniosoftware/invenio-workflows



Check afternoon hands-on

Want more on Holding Pen and workflows?

@Lilykos @jacquerie @jalavik

workflow, invenio-workflows

https://github.com/inveniosoftware/workflow

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Thank you!