# invenio-records Documentation

Release 1.0.1

**CERN** 

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Invenio-Records is a metadata storage module. A record is a JSON document with revision history identified by a unique UUID .

#### Features:

- Generic JSON document storage with revision history.
- JSONSchema validation of documents.
- Records creation, update and deletion.
- CLI and administration interface for CRUD operations on records.

Further documentation available Documentation: https://invenio-records.readthedocs.io/

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# CHAPTER 1

User's Guide

This part of the documentation will show you how to get started in using Invenio-Records.

# 1.1 Installation

Invenio-Records can be installed from PyPI. Several installation options are possible, for example to use SQLite database backend:

```
pip install invenio-records[sqlite]
```

The other installation [options] include:

```
access for access control capabilities;
docs for documentation building dependencies;
mysql to use MySQL database backend;
postgresql to use PostgreSQL database backend;
sqlite to use SQLite database backend;
admin for Flask administration interfaces;
```

# 1.2 Usage

Invenio-Records is a metadata storage module.

tests for test dependencies.

In a few words, a record is basically a structured collection of fields and values (metadata) which provides information about other data.

A record (and each revision) is identified by a unique UUID, as most of the others entities in Invenio.

Invenio-Records is a core component of Invenio and it provides a way to create, update and delete records. Records are versioned, to keep track of modifications and to be able to revert back to a specific revision.

When creating or updating a record, if the record contains a schema definition, the record data will be validated against its schema. Moreover, data format can for each field be also validated.

When deleting a record, two options are available:

- **soft deletion**: record will be deletes but keeping its identifier and history, to ensure that the same record's identifier cannot be reused, and that older revisions can be retrieved.
- hard deletion: record will be completely deleted with its history.

Records creation and update can be validated if the schema is provided.

Records CRUD operations are available using the administration interface and the CLI, which also allows batch operations.

If InvenioPIDStore is installed, it also enables to mint PIDs in a record using the CLI.

Further documentation available Documentation: https://invenio-records.readthedocs.io/

# 1.2.1 Initialization

Create a Flask application:

Initialize Invenio-Records dependencies and Invenio-Records itself:

```
>>> from invenio_db import InvenioDB
>>> ext_db = InvenioDB(app)
>>> from invenio_records import InvenioRecords
>>> ext_records = InvenioRecords(app)
```

The following examples needs to run in a Flask application context, so let's push one:

```
>>> app.app_context().push()
```

Also, for the examples to work we need to create the database and tables (note, in this example we use an in-memory SQLite database by default):

```
>>> from invenio_db import db
>>> db.create_all()
```

# 1.2.2 CRUD operations

#### Creation

Let's **create** a very simple record:

```
>>> from invenio_records import Record
>>> record = Record.create({"title": "The title of the record"})
>>> db.session.commit()
>>> assert record.revision_id == 0
```

A new row has been added to the database, in the table records\_metadata: this corresponds to the record metadata, first version (version 1).

#### **Update**

Let's try to **update** the previously created record with new data. This will create a new version of the previous with the same uuid but incremented version/revision id. Update the record and **commit** the changes to apply them to the record:

```
>>> record['title'] = 'The title of the 2nd version of the record'
>>> record = record.commit() # validate new data and store changes
>>> db.session.commit()
>>> assert record.revision_id == 1
```

A second row has been added, version 2. You can access to the different versions by doing:

```
>>> rec_v1 = record.revisions[0]
>>> rec_v2 = record.revisions[1]
```

### Reverting

To **restore** the first version of the record, just:

```
>>> record = record.revert(0)
>>> db.session.commit()
>>> assert record.revision_id == 2
```

#### **Patch**

It is also possible to **patch** a record to perform multiple operations in one shot:

```
>>> record = Record.create({"title": "First title"})
>>> db.session.commit()
>>> assert len(record.revisions) == 1
```

```
>>> ops = [
... {"op": "replace", "path": "/title", "value": "Title first record"},
... {"op": "add", "path": "/description", "value": "Record description"}
... ]
```

```
>>> record = record.patch(ops)
>>> record = record.commit()
>>> db.session.commit()
>>> assert len(record.revisions) == 2
```

See JSON Patch documentation to have nice examples.

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#### **Deletion**

Let's create another record and then **soft delete** it:

```
>>> record = Record.create({"title": "Record to be deleted"})
>>> db.session.commit()
>>> record['title'] = 'Record to be deleted version 2'
>>> record = record.commit()
>>> db.session.commit()
```

```
>>> deleted = record.delete()
```

There is only one row left in the database corresponding to this record. Notice that the json column is empty, but the uuid is still there. This ensures uniqueness. The record can be retrieved by doing:

```
>>> deleted = Record.get_record(record.id, with_deleted=True)
>>> assert deleted.id == record.id
```

Let's hard delete it, completely:

```
>>> deleted = record.delete(force=True)
```

Now, try to retrieve it, it will throw an exception.

```
>>> Record.get_record(record.id,
... with_deleted=True)
Traceback (most recent call last):
...
NoResultFound: No row was found for one()
```

#### 1.2.3 Record validation

When creating or updating a record, the input data can be validated to ensure that it is conform to a specified schema and values formats are respected. The validation is provided by the jsonschema library.

### How jsonschema works

• **Format checker:** create a custom format checker (or use one of the available), for example to validate if the first letter of a string is uppercase:

```
>>> from jsonschema import FormatChecker
>>> from jsonschema.validators import Draft4Validator
>>> checker = FormatChecker()
>>> f = checker.checks("uppercaseFirstLetter") (lambda value: value[0]
...
.isupper())
>>> validator = Draft4Validator({"format": "uppercaseFirstLetter"},
...
format_checker=checker)
```

Now, let's try it out:

```
>>> validator.validate("Title of the record")
```

Does not throw any exception, because the data is valid, the first letter is uppercase.

```
>>> validator.validate(
... "title of the record")
Traceback (most recent call last):
...
ValidationError: 'title of the record' is not a 'uppercaseFirstLetter'
...
```

This raises a ValidationError error exception, because the first letter is lowercase.

• Schema validator: create a validator to ensure that the input data structure, fields and types conform to a specific schema.

Try to validate a record without the field title, which is required.

```
>>> from jsonschema.validators import validate
>>> record = {"description": "Description but no title"}
>>> validate(record, schema)
Traceback (most recent call last):
...
ValidationError: 'title' is a required property
...
```

If the JSON schema is not defined inside the JSON itself, like in the example, but it is defined somewhere else (e.g. any schema provider service), the record should contain the \$ref field with the URI link to the schema definition. Record provides a method <code>api.RecordBase.replace\_refs()</code> that will resolve the URI in the \$ref field and return a new Record with the schema definition injected.

#### Invenio-Records validation

Let's put everything together and create a record with validation and format checking: define a schema with a mandatory title field and a validation format for the title field.

```
>>> from jsonschema import FormatChecker
>>> checker = FormatChecker()
>>> f = checker.checks("uppercaseFirstLetter")(lambda value: value[0]
                                                    .isupper())
>>> schema = {
        'type': 'object',
. . .
        'properties': {
. . .
             'title': {
                 'type':'string',
                 'format': 'uppercaseFirstLetter'
             },
. . .
             'description': {
. . .
                 'type':'string'
. . .
. . .
        },
```

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```
... 'required': ['title']
... }
```

Create a new record with an invalid value format for the title field. Notice that the schema must be defined in the record with the field \$schema and the format checker must be passed as kwarg argument with the key format\_checker, to be taken into account by the *jsonschema* library.

Create a new record without the title field:

## 1.2.4 CLI

The CLI provides a way of creating, patching or deleting records. Batch operations should be performed using the CLI.

Create a new record:

```
$ echo '{"title": "New record"}' | flask records create
```

Create multiple records:

```
$ echo '[{"title": "1st"}, {"title":"2nd"}]' | flask records create
```

A file with a list of records can be specified as parameter to create multiple records in one shot. It is also possible to specify a list of ids, where each id corresponds to an input record, respecting the ordering.

In case of already existing id, the force parameter will create a new revision of the record:

```
$ echo '{"title": "New record"}' | flask records create \
   -i deadbeef-9fe4-43d3-a08f-38c2b309afba
$ echo '{"title": "Same new record"}' | flask records create --force \
   -i deadbeef-9fe4-43d3-a08f-38c2b309afba
```

Patch an existing record:

```
$ echo '{"title": "New record"}' | flask records create \
   -i deadbeef-9fe4-43d3-a08f-38c2b309afbe
$ echo '[{"op": "replace", "path": "/title", "value": "Patched"}]' | \
   flask records patch -i deadbeef-9fe4-43d3-a08f-38c2b309afbe
```

Soft and hard delete a record:

```
$ echo '{"title": "New record"}' | flask records create \
    -i 28c18220-f22e-480c-88ea-cd414aef035b
$ flask records delete -i 28c18220-f22e-480c-88ea-cd414aef035b
$ flask records delete --force -i 28c18220-f22e-480c-88ea-cd414aef035b
```

# 1.2.5 Minting PIDs

If the module InvenioPIDStore is installed and loaded, the CLI option --pid-minter allows minting PIDs in records.

To use InvenioPIDStore, initialize your app with:

```
>>> from invenio_pidstore import InvenioPIDStore
>>> ext_pid = InvenioPIDStore(app)
```

Then, when creating a record/records using the CLI, the name of an existing PID minter can be specified as parameter:

```
$ echo '{"title": "New record with PID"}' | flask records create \
    -i deadbeef-9fe4-43d3-a08f-38c2b309afbc --pid-minter recid
$ flask run
$ curl http://127.0.0.1:5000/deadbeef-9fe4-43d3-a08f-38c2b309afbc

{
    "control_number": "1",
    "title": "New record with PID"
}
```

See InvenioPIDStore documentation for more information.

# 1.2.6 Signals

Invenio-Records provides several types of signals and they can be used to react to events to read or modify data before or after an operation.

Events are sent in case of:

- · record creation, before and after
- · record update, before and after
- record deletion, before and after
- · record revert, before and after

Let's modify the record before creation and verify, after creation, that the record has been correctly modified:

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```
record = kwargs['record']
record['created_with'] = 'Invenio'

listener = before_record_insert.connect(before_record_creation_add_flag)

>>> def after_record_creation(sender, *args, **kwargs):
record = kwargs['record']
assert 'created_with' in record

>>> listener = after_record_insert.connect(after_record_creation)
>>> rec_events = Record.create({"title": "My new record"})
>>> db.session.commit()
```

See API Docs for extensive API documentation.

# 1.3 Example application

Prepare the example app:

```
$ pip install -e .[all,sqlite]
$ cd examples
$ ./app-setup.sh
$ export FLASK_APP=app.py FLASK_DEBUG=1
$ flask run
```

Now, you can use invenio-records. Create a test record via CLI:

```
$ echo '{"title": "Test title"}' | flask records create \
-i deadbeef-9fe4-43d3-a08f-38c2b309afba
```

Run the development server:

```
$ flask run
```

Retrieve a record via web:

```
$ curl http://127.0.0.1:5000/deadbeef-9fe4-43d3-a08f-38c2b309afba
```

To reset the example application run:

```
$ ./app-teardown.sh
```

See *Usage* for the extensive list of commands.

# CHAPTER 2

# **API** Reference

If you are looking for information on a specific function, class or method, this part of the documentation is for you.

# 2.1 API Docs

Invenio module for metadata storage.

Extension initialization.

```
init_app (app, entry_point_group='invenio_records.jsonresolver', **kwargs)
    Flask application initialization.
```

#### **Parameters**

- app The Flask application.
- entry\_point\_group The entrypoint for jsonresolver extensions. (Default: 'invenio\_records.jsonresolver')

 $init\_config(app)$ 

Initialize configuration.

**Parameters** app – The Flask application.

# 2.1.1 Record API

Record API.

```
class invenio_records.api.Record(data, model=None)
```

Define API for metadata creation and manipulation.

Initialize instance with dictionary data and SQLAlchemy model.

#### **Parameters**

- data Dict with record metadata.
- model RecordMetadata instance.

### commit (\*\*kwargs)

Store changes of the current record instance in the database.

- 1. Send a signal invenio\_records.signals.before\_record\_update with the current record to be committed as parameter.
- 2. Validate the current record data.
- 3. Commit the current record in the database.
- 4. **Send a signal** *invenio\_records.signals.after\_record\_update* with the committed record as parameter.

#### **Keyword Arguments**

- format\_checker An instance of the class jsonschema.FormatChecker, which contains validation rules for formats. See *validate()* for more details.
- validator A jsonschema. IValidator class that will be used to validate the record. See validate() for more details.

Returns The Record instance.

#### classmethod create (data, id\_=None, \*\*kwargs)

Create a new record instance and store it in the database.

- 1. Send a signal invenio\_records.signals.before\_record\_insert with the new record as parameter.
- 2. Validate the new record data.
- 3. Add the new record in the database.
- 4. Send a signal <code>invenio\_records.signals.after\_record\_insert</code> with the new created record as parameter.

#### **Keyword Arguments**

- **format\_checker** An instance of the class <code>jsonschema.FormatChecker</code>, which contains validation rules for formats. See <code>validate()</code> for more details.
- validator A jsonschema. IValidator class that will be used to validate the record. See validate() for more details.

#### **Parameters**

- data Dict with the record metadata.
- id Specify a UUID to use for the new record, instead of automatically generated.

Returns A new Record instance.

#### delete (force=False)

Delete a record.

If *force* is False, the record is soft-deleted: record data will be deleted but the record identifier and the history of the record will be kept. This ensures that the same record identifier cannot be used twice, and

that you can still retrieve its history. If force is True, then the record is completely deleted from the database.

- 1. Send a signal invenio\_records.signals.before\_record\_delete with the current record as parameter.
- 2. Delete or soft-delete the current record.
- 3. Send a signal invenio\_records.signals.after\_record\_delete with the current deleted record as parameter.

Parameters force - if True, completely deletes the current record from the database, otherwise soft-deletes it.

**Returns** The deleted Record instance.

### classmethod get\_record(id\_, with\_deleted=False)

Retrieve the record by id.

Raise a database exception if the record does not exist.

#### **Parameters**

- id record ID.
- with deleted If *True* then it includes deleted records.

**Returns** The *Record* instance.

#### classmethod get\_records (ids, with\_deleted=False)

Retrieve multiple records by id.

#### **Parameters**

- ids List of record IDs.
- with deleted If *True* then it includes deleted records.

**Returns** A list of *Record* instances.

#### patch (patch)

Patch record metadata.

Params patch Dictionary of record metadata.

**Returns** A new Record instance.

# revert (revision\_id)

Revert the record to a specific revision.

- 1. Send a signal invenio\_records.signals.before\_record\_revert with the current record as parameter.
- 2. Revert the record to the revision id passed as parameter.
- 3. Send a signal invenio\_records.signals.after\_record\_revert with the reverted record as parameter.

**Parameters** revision\_id - Specify the record revision id

**Returns** The Record instance corresponding to the revision id

#### revisions

Get revisions iterator.

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```
class invenio_records.api.RecordBase(data, model=None)
```

Base class for Record and RecordBase.

Initialize instance with dictionary data and SQLAlchemy model.

#### **Parameters**

- data Dict with record metadata.
- model RecordMetadata instance.

#### created

Get creation timestamp.

```
dumps (**kwargs)
```

Return pure Python dictionary with record metadata.

id

Get model identifier.

```
replace_refs()
```

Replace the \$ref keys within the JSON.

#### revision id

Get revision identifier.

#### updated

Get last updated timestamp.

```
validate(**kwargs)
```

Validate record according to schema defined in \$schema key.

#### **Keyword Arguments**

• format\_checker - A format\_checker is an instance of class jsonschema. FormatChecker containing business logic to validate arbitrary formats. For example:

```
>>> from jsonschema import FormatChecker
>>> from jsonschema.validators import validate
>>> checker = FormatChecker()
>>> checker.checks('foo') (lambda el: el.startswith('foo'))
<function <lambda> at ...>
>>> validate('foo', {'format': 'foo'}, format_checker=checker)
```

returns None, which means that the validation was successful, while

```
>>> validate('bar', {'format': 'foo'},
... format_checker=checker)
Traceback (most recent call last):
...
ValidationError: 'bar' is not a 'foo'
...
```

raises a jsonschema.exceptions.ValidationError.

• validator - A jsonschema. IValidator class used for record validation. It will be used as *cls* argument when calling jsonschema.validate(). For example

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```
...)
>>> schema = {
         'type': 'object',
         'properties': {
             'name': { 'type': 'string' },
. . .
             'email': { 'type': 'string' },
. . .
             'address': {'type': 'string' },
. . .
             'telephone': { 'type': 'string' }
. . .
        },
. . .
         'required': ['name', 'email']
. . .
>>> from jsonschema.validators import validate
>>> validate({}, schema, NoRequiredValidator)
```

returns None, which means that the validation was successful, while

```
>>> validate({}, schema)
Traceback (most recent call last):
...
ValidationError: 'name' is a required property
...
```

raises a jsonschema.exceptions.ValidationError.

```
class invenio_records.api.RecordRevision(model)
    API for record revisions.
```

Initialize instance with the SQLAlchemy model.

```
class invenio_records.api.RevisionsIterator (model)
    Iterator for record revisions.
```

Initialize instance with the SQLAlchemy model.

```
next()
Python 2.7 compatibility.
```

# 2.1.2 CLI

Click command-line interface for record management.

```
invenio_records.cli.option_pid_minter(_)
    Empty option.

invenio_records.cli.records = <click.core.Group object>
    Records management.

invenio_records.cli.create = <click.core.Command object>
    Create new bibliographic record(s).

invenio_records.cli.patch = <click.core.Command object>
    Patch existing bibliographic record.

invenio_records.cli.delete = <click.core.Command object>
    Delete bibliographic record(s).
```

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# 2.1.3 Configuration

Default values for records configuration.

```
invenio_records.config.RECORDS_VALIDATION_TYPES = {}
```

Pass additional types when validating a record against a schema. For more details, see: https://python-jsonschema.readthedocs.io/en/latest/validate/#validating-types.

#### 2.1.4 Errors

Errors for Invenio-Records module.

 $\textbf{exception} \ \, \texttt{invenio\_records.errors.} \\ \textbf{MissingModelError}$ 

Error raised when a record has no model.

exception invenio\_records.errors.RecordsError

Base class for errors in Invenio-Records module.

#### **2.1.5 Models**

Record models.

```
class invenio_records.models.RecordMetadata(**kwargs)
```

Represent a record metadata.

The RecordMetadata object contains a created and a updated properties that are automatically updated.

A simple constructor that allows initialization from kwargs.

Sets attributes on the constructed instance using the names and values in kwargs.

Only keys that are present as attributes of the instance's class are allowed. These could be, for example, any mapped columns or relationships.

id

Record identifier.

json

Store metadata in JSON format.

When you create a new Record the json field value should never be NULL. Default value is an empty dict. NULL value means that the record metadata has been deleted.

#### version id

Used by SQLAlchemy for optimistic concurrency control.

# 2.1.6 Signals

Record module signals.

invenio\_records.signals.after\_record\_delete = <bli>Signal sent after a record is deleted.

When implementing the event listener, the record data can be retrieved from *kwarg['record']*.

**Note:** Do not perform any modification to the record here: they will be not persisted.

invenio\_records.signals.after\_record\_insert = <bli>Signal sent after a record is inserted.

When implementing the event listener, the record data can be retrieved from kwarg['record'].

**Note:** Do not perform any modification to the record here: they will be not persisted.

invenio\_records.signals.after\_record\_revert = <bli>Signal sent after a record is reverted.

When implementing the event listener, the record data can be retrieved from kwarg['record'].

**Note:** Do not perform any modification to the record here: they will be not persisted.

invenio\_records.signals.after\_record\_update = <bli>Signal sent after a record is updated.

When implementing the event listener, the record data can be retrieved from kwarg['record'].

**Note:** Do not perform any modification to the record here: they will be not persisted.

invenio\_records.signals.before\_record\_delete = <bli>Signal is sent before a record is deleted.

When implementing the event listener, the record data can be retrieved from kwarg['record'].

invenio\_records.signals.before\_record\_insert = <bli>Signal is sent before a record is inserted.

When implementing the event listener, the record data can be retrieved from *kwarg['record']*. Example event listener (subscriber) implementation:

```
def listener(sender, *args, **kwargs):
    record = kwargs['record']
    # do something with the record

from invenio_records.signals import before_record_insert
before_record_insert.connect(listener)
```

invenio\_records.signals.before\_record\_revert = <bli>Signal is sent before a record is reverted.

When implementing the event listener, the record data can be retrieved from kwarg['record'].

invenio\_records.signals.before\_record\_update = <bli>Signal is sent before a record is updated.

When implementing the event listener, the record data can be retrieved from *kwarg['record']*.

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# **Additional Notes**

Notes on how to contribute, legal information and changes are here for the interested.

# 3.1 Contributing

Contributions are welcome, and they are greatly appreciated! Every little bit helps, and credit will always be given.

# 3.1.1 Types of Contributions

### **Report Bugs**

Report bugs at https://github.com/inveniosoftware/invenio-records/issues.

If you are reporting a bug, please include:

- Your operating system name and version.
- Any details about your local setup that might be helpful in troubleshooting.
- Detailed steps to reproduce the bug.

# **Fix Bugs**

Look through the GitHub issues for bugs. Anything tagged with "bug" is open to whoever wants to implement it.

# **Implement Features**

Look through the GitHub issues for features. Anything tagged with "feature" is open to whoever wants to implement it.

#### **Write Documentation**

Invenio-Records could always use more documentation, whether as part of the official Invenio-Records docs, in docstrings, or even on the web in blog posts, articles, and such.

#### **Submit Feedback**

The best way to send feedback is to file an issue at https://github.com/inveniosoftware/invenio-records/issues.

If you are proposing a feature:

- Explain in detail how it would work.
- Keep the scope as narrow as possible, to make it easier to implement.
- Remember that this is a volunteer-driven project, and that contributions are welcome:)

#### 3.1.2 Get Started!

Ready to contribute? Here's how to set up *invenio-records* for local development.

- 1. Fork the *inveniosoftware/invenio-records* repo on GitHub.
- 2. Clone your fork locally:

```
$ git clone git@github.com:your_name_here/invenio-records.git
```

3. Install your local copy into a virtualenv. Assuming you have virtualenvwrapper installed, this is how you set up your fork for local development:

```
$ mkvirtualenv invenio-records
$ cd invenio-records/
$ pip install -e .[all]
```

4. Create a branch for local development:

```
$ git checkout -b name-of-your-bugfix-or-feature
```

Now you can make your changes locally.

5. When you're done making changes, check that your changes pass tests:

```
$ ./run-tests.sh
```

The tests will provide you with test coverage and also check PEP8 (code style), PEP257 (documentation), flake8 as well as build the Sphinx documentation and run doctests.

6. Commit your changes and push your branch to GitHub:

```
$ git add .
$ git commit -s
    -m "component: title without verbs"
    -m "* NEW Adds your new feature."
    -m "* FIX Fixes an existing issue."
    -m "* BETTER Improves and existing feature."
    -m "* Changes something that should not be visible in release notes."
$ git push origin name-of-your-bugfix-or-feature
```

7. Submit a pull request through the GitHub website.

# 3.1.3 Pull Request Guidelines

Before you submit a pull request, check that it meets these guidelines:

- 1. The pull request should include tests and must not decrease test coverage.
- 2. If the pull request adds functionality, the docs should be updated. Put your new functionality into a function with a docstring.
- 3. The pull request should work for Python 2.7, 3.3, 3.4 and 3.5. Check https://travis-ci.org/inveniosoftware/invenio-records/pull\_requests and make sure that the tests pass for all supported Python versions.

# 3.2 Changes

Version 1.0.1 (released 2018-12-14)

- Fix CliRunner exceptions
- · Fix json schema url
- · MIT license and shield badge

Version 1.0.0 (released 2018-03-23)

• Initial public release.

# 3.3 License

MIT License

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