Function 10: Export for Review with Clickable Handles

Purpose

Exports a specialized CSV file designed for manual review of digital objects. The CSV includes clickable Handle links and empty columns for reviewers to fill in during their assessment.

What It Does

1. **Extracts Key Metadata** - For each record in the loaded set:

   - Handle URL (dc:identifier starting with `http://hdl.handle.net/`)
   - MMS ID
   - dc:title
   - dc:type (all type values, semicolon-separated if multiple)

2. **Creates Clickable Links** - The Handle column uses Excel/Google Sheets HYPERLINK formula format, making the URLs clickable when opened in spreadsheet applications

3. **Adds Review Columns** - Three empty columns for manual review:

   - **Thumbnail?** - To verify thumbnail images display correctly
   - **File Opens?** - To verify the digital file opens/plays properly
   - **Needs Attention?** - To flag any issues requiring follow-up

Output

File Name

- `Exported_for_Review.csv` (fixed filename, overwrites if exists)

CSV Structure

```
Handle,MMS ID,Title,dc:type,Thumbnail?,File Opens?,Needs Attention?
=HYPERLINK("http://hdl.handle.net/11084/123","http://hdl.handle.net/11084/1
23"),991012345678904641,Example Document Title,Text; Still Image,,,
```

Column Descriptions

Column	Content	Purpose
Handle	Clickable HYPERLINK formula	Click to open the item in browser
MMS ID	Alma MMS ID	Reference for record lookup
Title	dc:title value	Identify the item being reviewed
dc:type	All dc:type values	Know what type of object to expect

Column	Content	Purpose
Thumbnail?	Empty	Reviewer marks Y/N/Issues
File Opens?	Empty	Reviewer marks Y/N/Issues
Needs Attention?	Empty	Reviewer notes any problems

How to Use

Step 1: Load Your Set

1. Enter a Set ID in the "Set ID" field
2. Click "Load Set Members"
3. Verify the correct records are loaded (preview shows first 20)

Step 2: Run the Function

1. Select **"Export for Review with Clickable Handles"** from the function dropdown
2. Click **"Run Function on Set"**
3. Wait for processing to complete
4. Check log output for confirmation

Step 3: Review the Export

1. Open `Exported_for_Review.csv` in Excel, Google Sheets, or LibreOffice Calc
2. The Handle column should be clickable (blue, underlined links)
3. Click each Handle to verify the digital object
4. Fill in the review columns:
     - Enter "Y" (yes), "N" (no), or describe issues
     - Use the "Needs Attention?" column for detailed notes

Step 4: Process Review Results

1. Filter or sort by review columns to find problems
2. Records with "N" or notes in "Needs Attention?" require follow-up
3. Use the MMS ID to locate records in Alma for corrections

Review Tips

Efficient Review Workflow

1. **Sort by dc:type** - Review similar objects together (all images, all PDFs, etc.)
2. **Use filters** - After first pass, filter to show only flagged items
3. **Batch similar issues** - Group records with same problem for efficient fixing
4. **Document patterns** - Note if certain collections/types have recurring issues

What to Check

- **Thumbnail?**

- Does a thumbnail image appear in the viewer?
- Is it the correct thumbnail for this item?
- Is the image quality acceptable?

- **File Opens?**

  - Does clicking the file link work?
  - Does the file display/play correctly?
  - Are there multiple files? Do all work?

- **Needs Attention?**

  - Wrong thumbnail or file
  - Broken links (404 errors)
  - Poor quality images/files
  - Missing metadata
  - Copyright/permissions issues
  - Anything unusual or incorrect

Spreadsheet Tips

- **Freeze top row and first columns** - Keep headers and Handle visible while scrolling
- **Use data validation** - Set dropdown lists for Y/N responses
- **Conditional formatting** - Highlight rows with "N" responses in red
- **Add timestamp column** - Track when each record was reviewed

Technical Details

API Efficiency

- Uses Alma batch API calls (100 records per call)
- Logs efficiency stats: batch calls vs individual calls
- Progress updates every 50 records

Handle Link Format

The Handle column uses Excel HYPERLINK formula:

```
=HYPERLINK("url","display_text")
```

This format works in:

- ✅ Microsoft Excel (Windows/Mac)
- ✅ Google Sheets
- ✅ LibreOffice Calc
- ✅ Apple Numbers
- ⚠️ Plain text editors will show the formula, not a clickable link

Records Without Handles

- Records without Handle URLs are still exported
- Handle column will be empty for these records
- Count is logged: "X with handles, Y without handles"

Error Handling

- Failed records are logged with error details
- Processing continues for remaining records
- Final summary shows success/failure counts

Common Issues & Solutions

Links Not Clickable

Problem: Handle column shows formula text instead of clickable links

Solution:

- Open in Excel/Google Sheets/LibreOffice (not plain text editor)
- If formula still visible, the file may have opened in "text mode"
- In Excel: Select the Handle column → Data → Text to Columns → Finish

Empty Handle Column

Problem: Some or all Handle cells are empty

Cause: Record doesn't have a dc:identifier field containing a Handle URL

Solution:

- Check record in Alma to verify Handle exists
- If missing, use other functions to add/fix identifiers
- Records without Handles cannot be directly accessed via Handle system

Special Characters in Title

Problem: Title displays incorrectly or breaks CSV format

Cause: Special characters, quotes, or commas in title field

Solution: CSV format handles this automatically with proper escaping. If viewing looks wrong:

- Open in Excel/Sheets (they handle CSV escaping properly)
- Don't edit in plain text editor
- If re-saving, use "CSV UTF-8" format

Best Practices

Before Starting

1. **Use appropriate sets** - Create focused sets for review (by collection, date, type, etc.)
2. **Test with small set first** - Verify format works for your workflow

3. **Prepare review guidelines** - Define criteria for "acceptable" thumbnails/files

During Review

1. **Work systematically** - Don't skip around randomly
2. **Take notes** - Document patterns or unusual issues
3. **Regular saves** - Save your review progress frequently
4. **Batch similar items** - Review all images together, all PDFs together, etc.

After Review

1. **Share results** - Distribute to team for follow-up actions
2. **Track corrections** - Create issues/tickets for items needing fixes
3. **Re-review** - After fixes, re-run export to verify corrections
4. **Archive** - Keep review CSVs as quality assurance documentation

Related Functions

- **Function 3**: Export Set to DCAP01 CSV - Full metadata export
- **Function 8**: Export dc:identifier CSV - Focus on identifier fields
- **Function 9**: Validate Handle URLs - Automated HTTP status checking

Example Workflow

1. Load a set of recently ingested digital objects
2. Run Function 10 to create review CSV
3. Team reviews using the spreadsheet
4. Filter for records marked "Needs Attention?"
5. Catalogers fix identified issues in Alma
6. Re-run Function 10 to verify fixes
7. Run Function 9 to validate all Handles return 200 OK