Part One – Updating

What to expect each semester for established courses

Similar to your Canvas course instance for each semester or year, reading lists are automatically copied over from one time period to the corresponding time period in the following year (e.g., Semester Two 2022 -> Semester Two 2023).

You will be advised when this has happened (or is due to happen), generally the Library does this 1-3 months before the relevant teaching period. This process is called ‘rollover’, and it also links any digitised material that was on the previous version of the list to the newly copied list.

What to do if your course is new, has changed semester, or is coming back after a hiatus

If your course is running for the first time, you can create a new list for it; Talis101-Essentials guide.

If your course has moved to a different semester from last year, please contact the Library to arrange for it to be swapped over. This is so that any digitised content links will be preserved.

If your course is coming back after a hiatus and you would like to resurrect a previous list, contact the Library to ask for a copy of the version you require. We have an archive of all lists going back to when Talis was first introduced to the University. You can ask for multiple versions to be copied if you are unsure which one you’d like to use.

What to do if you have inherited a list from a colleague

The copy of the list you receive from the Library is fresh and independent, so you can make any changes you like without affecting your colleague’s former version of the list.

You may find that your colleague’s name is on the list as its owner, and we strongly encourage you to change that to your own name, or to add your name if none is present.

Change or add list owner

The list owner is the person the Library will contact about a list if necessary. It is a way for you to put your name on your list to claim the work that you have done in curating it. It can also help students find a list.

- In the Edit menu, choose Assign list owner.
- Remove any name that is there using the red delete icon, then type your own name into the box. When it appears in the results, click on it,
- Save. Do not click ‘Save with list publisher role’.
The list owner name on the list has nothing to do with who can make edits to the list. All current staff members should have editing ('List publisher') privileges on all lists. If you find that a colleague is unable to edit your list, please contact the Library.

Only one list owner is possible per list. If you are part of a teaching team, you should choose the main contact person to be the list owner. Often, this is the course coordinator or director. If you would like your colleagues’ names to be visible on the list as well, you can:

- add everybody’s names to the list description (Edit menu > Edit list details), which appears under the title when present, or
- if you are each teaching/curating a section, you can name the sections (e.g., Week 2 - Professor Joe Bloggs).

**List copying, and why you should think twice**

You can copy a list yourself, but it’s not advised, and here’s why.

- You almost never need to do so. If your course ran in the same semester the previous year, there will be a copy created for you by the Library for that semester in the new year. This copy will have the previously digitised content attached to it. If you make your own copy, you will not have access to that content. It is better to edit the Library's copy.
- If your course is changing semesters, ask the Library to do the copying so we can preserve the digitised content for you.
- Copying a list yourself does not bring the digitised content with it. If you make new requests for that content on your copied list, the system will reject them because they are duplicates.
- Multiple copies of reading lists for a single course create confusion for the students, even if you link one to Canvas. The only exception to this is where a course has many modules that each have their own unique, full-size reading list (e.g., certain PHARMACY or MBCHB courses).

**What to do once your list is ready to edit:**

- Update or make changes as desired
- Request any digitisations you need
- Request purchases if necessary
- Publish your list to make changes visible and allow it to appear in Canvas
- Request a review from the Library
- Link the list in the Canvas 'Reading Lists' tab

**Best practice tips (size of list, layout, etc)**

Promote engagement by selecting and arranging readings thoughtfully.

- Split your list into sections by module, topic, or week
- Keep list size manageable according to your subject area
- Use importance levels to indicate priority readings so students can plan and the Library can resource adequately
- Add paragraphs or notes to direct student attention
- The Library has produced a video ([Think strategically about reading lists](https://www.youtube.com), YouTube, 11min) that covers some best practices to give students the best experience possible
Part Two – Extra editing tips

Become a list editing pro by learning to use the functionality available throughout the reading list interface.

Floating bar

- This is the blue bar that follows your mouse as you move it up and down the list.
- A blue ‘flag’ shows at the left-hand side of this bar to indicate which section of the list you are in (if your list has sections, which are recommended).

Adding and nesting list sections

You can create a section within your list by clicking Add section on the floating bar. Sections help students plan their learning and make a longer list less daunting.

- Sections also populate the list’s table of contents/quick access menu (see right).
- Make sure to look at the flag on the left of the bar when adding sections. If it shows a section name, the new section you add will be nested inside that section, as below. You can tell that a section is nested because its brackets are inside the larger brackets.
o To add a section below (and outside) another section, move the floating bar until the flag disappears. The bar may appear to be sitting on top of the next section: this is normal.

o In the screenshot below, the bar is positioned to add a section between the section above and 'Session 3', which is visible.

![Screen shot of adding a section](image)

o If you add a section inside another section by mistake, you can move it out easily. From the three dots menu on the right-hand side of the section title area, select **Move up** or **Move down** as appropriate to relocate your section. **Cut and Paste** will also work and are recommended if you are moving the section a long way from its current location.

o Do not delete a section unless you are certain. The **Delete** action is irreversible (even the Library cannot reverse it). Using delete on a section means you will lose all the bookmarks in it and have to re-add them if you change your mind. If you want to delete a section but retain the bookmarks, move them out of the section first (see below: Moving items on a list).

### Adding paragraphs

o On the floating bar, the **Add Paragraph** option lets you add a block of text to your list.

o You can use this to provide information, reading directions, or anything else you like for the students.

o Paragraphs offer a small number of formatting options, so you are not limited to plain text.

### Adding or removing resources from a list

o **Adding resources** (bookmarks) can be done in two ways. The first step is to create a resource bookmark using the Talis browser extension. For bookmark instruction see [Talis 101-Essentials guide](#).

o When you create a bookmark, you have the option of adding it directly to your or adding it to your My Bookmarks for later use. Neither of these methods is better than the other: choose whatever suits your workflow.

o If you have chosen to add to My Bookmarks for later use, you can add the resource bookmark to your list by clicking **Add resource** on the floating bar. Make sure you have positioned the bar in the desired location on the list first. A box will pop up showing items you have recently bookmarked. If you've collected a lot, you may need to type a keyword in the search box to get your desired resource to appear. Click on the resource to add it to the list. Make sure to add importance once it’s in place.
Removing resources is done by means of the red **Delete** option in the three dots menu. You will see a prompt to confirm. Once confirmed, the delete action is irreversible, but you are only deleting the bookmark from the *list*. If the bookmark is saved in your My Bookmarks collection (this is automatic if you made the bookmark yourself), you can re-add later if you change your mind.

If you've inherited a list from a colleague and you did not make the bookmarks but would like to retain them just in case, click **Add to my bookmarks** at the bottom of the same three dots menu before deleting. If this option is greyed out, it means you already have the bookmark in your collection.

**Warning:** if you see **Digitisation attached** in the menu of a bookmark you are about to delete, then deleting the item will break the link to that content, even if you later reinstate the bookmark. If you're sure you no longer want the content, no problem, but if you are not sure and later decide to use that content again within the same teaching period, you will need to ask the Library to relink the digitisation for you.

### Moving items on a list

There are three main ways to move parts of your list around.

- **Move arrows** (for bookmarks only). These are double-ended arrows that can be found on the right-hand side of individual bookmarks. Click on the arrows and hold to drag the bookmark up or down the list. This is recommended for moving bookmarks over short distances only, as it doesn’t scroll well.

- **Move up/Move down** (for bookmarks or sections). These options are found inside the three dots menu on the right-hand side of a section or bookmark. Clicking these moves the relevant component up or down one place on the list. Moving a section like this also takes all the bookmarks inside the section with it. This method is useful for small adjustments and is quickly reversed, if necessary, but can be time consuming and tedious if you are moving items a long way.

- **Cut/Paste** (for bookmarks or sections). **Cut** is also found inside the three dots menu on the right-hand side of a section or bookmark. When you cut an item, it will be greyed out but still visible. You will see the **Paste** option appear on the floating bar. Scroll to where you would like to put the content, line the bar up with the correct position, and click Paste. You cannot cut another item or do anything else while you are waiting to paste, so there is no chance of losing content this way. Cut/Paste is highly recommended for moving items a long distance on a list. Cutting and moving a section will also take all the bookmarks inside the section with it.

- **Note 1**: Do not use a ‘Delete and re-add’ process in order to move items. This breaks digitisation links, and if you did not make the bookmark yourself, you will have to re-do it from scratch.

- **Note 2**: You cannot move any list components in bulk. They can only be moved one by one. The only way around this is to put everything you want to move inside another section and then move that section.
Using notes

Two note types are available from a bookmark’s three dots menu.

- **Student notes** – Use these to direct student reading or add commentary. The Library may also use Student notes to provide instructions helping students navigate electronic resources successfully.

- **Library notes** – Use these to make comments visible only to you and the Library. These should be used in advance of requesting a list review. The Library does not receive notifications when you add these notes. The only time we will see them is during a review. Library notes should never be used to request digitisations: instead, use the **Request digitisation** option in the same menu.

Sharing bookmarks

If you see a resource on a different reading list (perhaps that of a colleague), or you would like to share a bookmark with a colleague, there is functionality to allow you to do this.

- **Add to My Bookmarks** – Use this to add any existing bookmark to your personal collection. You can collect bookmarks from any list, not just ones you own or have worked on. If you inherit a list from a colleague, you can also use this functionality while editing. Collect the bookmarks into your own collection so that you have the freedom to remove and or re-add them without losing them. If this option is greyed out, you already have the bookmark. You can view and search your collection from the **My Bookmarks** option at the top of the Talis screen.

- **Share item** – This option provides you with a unique link to a reading list item: you can use this to draw a student’s attention directly to a resource, if necessary (for example, if they were unclear about where to find something). You can also use this to communicate with colleagues, or with the Library about a specific list item. Please note that the link only works for the item on your current reading list: the URL will change the next year/semester on the fresh version of the list.

Additional list functionality

- **Student View**: The **View & Export** menu on the right-hand side at the top of the list offers you the option to **View as student**. This can be useful while editing. The students’ view of the list is largely similar to your own, but you can use this to check what they are and are not able to see based on changes you have made.

- **Reporting broken links** can be done from within Student View. Use the three dots menu on a bookmark to report a problem with the linking in the bookmark. These reports come directly to the Library and are dealt with daily from Monday to Friday.
Request a review

In the list’s Edit menu, you can find the option to Request a review. This sends a message to the Library, who will:

- Check through your list.
- Make sure e-resource links are working.
- Make sure there is access to all the resources you have nominated.
- Add usage advice to help students with access.

The Library will eventually review all lists each semester. They are done in random order and as there are hundreds of them, it takes a long time. If you rely on this process, your list may not be seen until weeks into the semester.

Priority service is given to those who request their own review, so please take advantage of this as soon as you are finished editing your list, ideally before semester starts.

If, at some point later in the semester, you add a significant amount of extra content, please request another review so the Library can check the new material.