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Last updated Rachel Scanlon 18/10/2019
Creating a reading list

1. Log into ORLO and click on “My lists” followed by “Create New List”

2. In the dialogue box:
   a. List name – Use the naming convention to name your list. See the LibGuide for more information.
   b. Description – The description field can be used to describe the content of the list. This also where you should put the digitization code. See the LibGuide for more information.
   c. Hierarchy - This is not implemented yet for ORLO. Leave it blank.
   d. Time period – Choose Academic Year 2019/20
   e. Click “Create List”

3. You will be prompted to say whether you are the owner of the list or not. Choose “I am list owner”. Good to know: ownership can be transferred at a later date so you will not have to remain the owner.

Structuring a reading list
You can set up the structure of the list based on the previous print list or in whatever style you would like.

How to:
- To add a section; click on the cross next to “New section” and drag the new section over to the main reading list. A box with dashed lines will appear to indicate where the section is to be added.
- To add a subsection; click on the cross next to “New section” and drag the new section into an existing section.
- To add a note; click on the cross next to “New note” and drag the not to the correct section.

Style
- Use sections and sub sections to re-create the headings in the original reading list.
- Give each section a heading (e.g. “Readings for week 1”) and can have a study note e.g. “read at least the first 10 books in the list”. If there are sub-headings within the section (e.g. primary readings / secondary readings etc) then you can drag another section and drop it inside the original section.
- For longer notes, e.g. a paragraph or more of text, drag a “New Note” into the section, these can include formatting and hyperlinks.
- If there is a short note, e.g. read ch.1, before the list of items add this as a note for students.
- Do not use the “New Page” function.
Creating bookmarks (for adding to reading list)

To add resources to a reading list you first need to create bookmarks of those resources. You can include different types of resources in a list: e.g. books, ebooks, print or electronic journals, journal issues or individual articles, websites, and multi-media to give a few examples. When a resource is included in a list you can also add notes and mark the importance. If a resource is included more than once in the same list (for example for different weeks), the notes and importance can be different (for example directing students to read particular chapters for particular sessions).

To add resources to reading lists, you first need to create a bookmark to the resource. To bookmark resources use the ORLO bookmark tool. Resources in the library catalogue SOLO are the best to use for bookmarking as they have accurate information. You can also use the ORLO bookmark tool, to bookmark resources from the internet. Bookmarks can be imported via .RIS files (most reference management software can create these) and you can create bookmarks manually, though this is not recommended.

Once you have bookmarked a resource it will be saved in ‘My Bookmarks’. The list of bookmarks you have created will appear in the right hand column when you edit a list.
Bookmarks by resource type

Books

1. Make sure the Bookmark Button is available in your browser (see separate guide for how to install this).
2. Find the resource to be added in SOLO. See Tips for using SOLO.
3. Click on the title of the resource in SOLO. The details page for the item will open.
4. Click on the 'Add to My Bookmarks' button in your browser bookmark bar.
5. This will pull up a form which will be pre-populated with metadata for the specified item. In most cases you will not need to change anything on this page. However, if you do see anything that is clearly incorrect then you can change it here.
6. Select “Create” to add the resource to your list of bookmarks. You can then add it to your reading list later (see Adding bookmarks to reading lists and annotating bookmarks. Alternatively, you can add the resource to a chosen list by selecting ‘Create & Add to List”.

![Image of Primo Explore bookmarking form](image-url)
Ebooks
To bookmark ebooks, follow the same instructions for books. Make sure the Online Resource box is ticked. Only bookmark ebooks with a green dot in SOLO.

Print book and ebook
For titles available in **both print and electronic/ebook formats** (only green dot ebooks) you should include information on both, by bookmarking the print edition and then adding the electronic one to it.

1) Find the relevant title in SOLO.
2) Click on the ebook title (the version marked ‘Online Access’) to open the details.
3) Copy the URL of the e-book by right clicking on the link given in the details screen of SOLO under “View online” and choosing “copy shortcut” or “copy link location”. This copies the URL of the e-book to your clipboard.

4) Go back to the list of versions in SOLO and click on the print edition you want to use.
5) Bookmark the title. When the metadata box pops up, edit it to include the URL for the e-book
   a) Click on ‘Author’ (bottom of screen, next to ‘Add field’) and select ‘Web address’ from the pop-up list
   b) Click ‘Add’
   c) In the new ‘Web address’ field, paste the URL you copied before.
   d) Tick the ‘Online resource’ box
   e) Click on ‘Create’ or ‘Create and Add to List’.

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ORLO
OXFORD READING LISTS ONLINE
Chapters in books

Where the reading list instructs students to read a particular chapter or section you can either create a bookmark for the whole book, then add a student note (see Annotations – Student and Library notes) in the reading list specifying the chapters, OR you can create a bookmark to the specific chapter.

1) Where the specified chapter(s) are by the same author(s) as the book itself simply bookmark the book itself and then add a student note (e.g. chapters 1-3).

It will normally be clear that you should take this approach from the original reading list because the reading list will include the book details and a note to read the specific chapter e.g. Maxwell, J., 2013. Qualitative Research Design: An Interactive Approach, Sage. Chapters 4, 5 and 7. In this case, create a bookmark for the whole book and then add a student note to read chapters 4, 5 and 7.

2) Where the specified chapter points to a chapter in an edited collection where the author of the chapter is not necessarily the author/editor of the book create a bookmark for the chapter (rather than for the book).

You can normally tell if the item falls into this category from the original reading list as it will say the “chapter title” IN “book title” e.g. Chapter 7: Mixed method research in Criminology: Why not go both ways? In: Handbook of Quantitative Criminology. (2011). New York: Springer. In this case the fact that this chapter is specified as being in Handbook of Quantitative Criminology indicates that it should be added as a separate chapter.

NB. If in doubt, add as a separate chapter.

To create a bookmark to a chapter:
1. Find the whole book in SOLO and follow steps 1-5 of Bookmarking Books. N.B. Don’t hit create yet.

a) In the ‘Bookmarking from...’ box, click ‘Add field’ at the bottom of the box and select ‘Has part (chapter...)’

b) Click ‘Add’. A new tab will appear.

c) Select the relevant ‘Resource type’ from list (i.e. ‘Chapter’)

d) Add the chapter title.

e) Use the ‘Add field’ option to add the author. Two boxes will appear put the surname in the correct box. You can add more fields, for example giving pages if they are provided.

f) Click on ‘Create’ or ‘Create and Add to List’ as usual.

The chapter details will appear on the reading list, but the location for the whole book will show making it easier for students to find the item.

Journals
To bookmark a whole journal follow the instructions for books.
Journal articles

1. Find the resource to be added in SOLO. See Tips for using SOLO.

   ![Find It at Oxford](image)

   **Title:** Introduction: Migration, Refugees, and Diaspora in Children’s Literature  
   **Source:** Children’s Literature Association Quarterly [0885-0429] Nel yr:2018 vol:43 iss:4 pg:357 -362

   **Full Text:**
   - Full text available via [Project Muse Humanities Collection](#)
   - Full text available via [Literature Online (LION)](#)
     - This article may not be available because of an embargo period.
   - Full text available via [ProQuest Literature Online](#)
     - This article may not be available because of an embargo period.

   © 2019 SFX by Ex Libris Inc.

2. Click on the title of the resource in SOLO. The details page for the item will open.
3. Click in the “Link to online resource”. A webpage with one or more links will open.
4. Choose one of the links (use the information underneath the link about the time period covered etc.) and click on it.
5. The article will open in a new tab.
6. Click on the ‘Add to My Bookmarks’ button in your browser bookmark bar. This will ensure that the student gets taken directly to the article.
7. This will pull up a form which will be pre-populated with metadata for the specified item. In most cases you will not need to change anything on this page. However, if you do see anything that is clearly incorrect then you can change it here.
8. When checking the links if you receive the error message ““
9. Occasionally these links fail – where this happens you will find out when you check the reading list at the end. If this happens, remove the bookmark and create a new one by bookmarking the article in SOLO.

Other library resources

For other resources, such as theses, conference proceedings and grey papers, follow the same procedure. If you cannot find the item in SOLO follow the instructions for Web pages, online reports etc.

**Bookmarking a YouTube video**

It is possible to bookmark a YouTube video and add it to a reading list. When you do this, ORLO automatically detects the resource type as ‘Audio-visual document’. This is correct but in the reading list, it will not show ‘View Online’ as with other online material. To amend this, simply tick the ‘Online resource’ box.
Web pages, online reports etc.
1. Open the webpage you wish to bookmark in a browser.
2. Click on the ‘Add to My Bookmarks’ button in your browser bookmark bar.
3. Add any necessary information, such as author, publisher, publication year etc. that does not appear in the metadata pop up box. (e.g. find author in the drop down menu and click “Add”, then fill in the authors name).
4. Bookmark webpages from the reading list for websites, blogs, online newspaper articles etc.
5. For books, journal articles and other published material check SOLO first.

Manually create bookmarks
1. If you cannot create a bookmark to a particular resource or if you cannot find an item in SOLO, Worldcat, Amazon or on the web choose “My bookmarks” in ORLO
2. Then Choose “Add” – “Add manually”
3. An empty metadata form will appear – choose the document type (e.g. Legal Case Document”)
4. Add fields to the form using the drop down menus at the foot of the dialogue box (e.g. find title and click add) and then populate the form.

Tips for using SOLO
- Log in to SOLO before doing any searching. This will allow access to resources outside of Oxford campus.
- For books, ebooks and journals; limit your search to “Oxford Collections”
- For journal articles; limit your search to “Articles”. N.B. Some articles that we have access to are not included in this search. You may have to try A-Z databases, accessible through the SOLO homepage.
- If you do not limit the search and search everything, you may come across reviews and book chapters which are easily confused with the main item you are looking for. Always click on the title of the item and review the data to see if it is correct.

Adding bookmarks to reading lists and annotating bookmarks
Once you have bookmarked a resource, you can add it to your list.
1. Find your list and display it on the screen.
2. Click ‘Edit’ and select ‘Edit list (classic)’. You will now see your list in ‘Edit mode’ and your bookmarks next to it.

3. To add a bookmark to your list, click on the cross symbol next to the title in your list. Hold down the mouse button and drag the resource into place in your list. A box with dashed lines will appear to show where the resource will be positioned. (you can change the order of resources by clicking and dragging them within the list).

4. Click on ‘Edit sites and importance’ to add importance and notes to students and library. If you only want to add importance, you can use the drop-down list under ‘Set Importance’.

Annotations – Student and Library notes

You can annotate an individual item on a list to add guidance for students and the library. You can do this either when you include an item or later when you/someone else reviews the list. If a title is included more than once on a list, you can add different annotation to each instance.

Note for Student

Use student notes to display text next to a resource in the list, for example to add context or instructions, directing students to a particular section of a book, or giving information about which edition(s) may be used.

Importance

Help students and libraries to prioritize their reading and acquisitions by indicating the level of importance for each title: essential, recommended, further.
Note for Library

This is useful not only for information for acquisitions staff but also to include notes for academics. If you are creating a list with another academic you can leave notes here for them to review. If you are tasked with entering the list, but didn’t create it, you can leave notes here about any citations you did not understand or had trouble finding. In particular include queries for academics here. For example where you are not sure if you have chosen the correct item enter the note “CORRECT ITEM?.....” and then put some explanatory text e.g. CORRECT ITEM? Title matches original reading list but different author is this the right item?

Publishing and saving

A reading list is not visible to students until it is published. As you work on the list remember to save it regularly, this will preserve your edits. If you are the list owner and have final decision on the list you should publish it as soon as it is ready, ideally 6 weeks before the start of the course. This allows the library time to make relevant purchases.

To publish a list select edit list (classic) from the menu at the top. Above your bookmarks there are three options: Publish; Save Draft and Request Review.

Publish will publish the list. This will make it visible to students and automatically send a request to the library to review the list.

Save Draft will save all your bookmarks and edits.

Request Review will not make the list visible but it will send a request to your library. As libraries only want to make purchases based on the final version of a list it is generally better to just select Publish, though contact your library for more information.

Good to know: A list cannot be unpublished. If you accidentally publish your list it will need to be archived or deleted if you do not want it to be visible.

Good to know: You can add new items to a list after it has already been published, but they will not be visible until you publish again. If you do make edits after publishing it is very important to publish the list again.

Troubleshooting:

Cannot find item in SOLO

If you cannot find the item on SOLO (i.e. because we do not have it in Oxford) use Worldcat (www.worldcat.org) and failing that use Amazon.

Choosing between formats and edition

Please use the following guidelines when choosing between formats and editions, when there is no pedagogic reason to prioritise an edition. Where you have a comment to make about the edition chosen you can do this by creating a library note. To find out how to leave a library note see Annotations – Student and Library notes.

1. Where the specified edition is available in print AND as an e-book with a green dot, create an ORLO bookmark which includes the print holdings and a link to the online version. See Print book and ebook.
2. If you are creating the reading list we recommend you use the latest edition, if there is no pedagogic reason to use another.
3. If you are only entering the list in ORLO always use the edition specified on the original reading list even if this edition is not available in Oxford. If you want to query the edition chosen, add the edition
as specified on the reading list and then in Library notes enter “Edition: your text” e.g. Edition: A new edition (4th ed pub 2019) is now available.

4. Where an edition is NOT specified then use the most recent edition available on SOLO, regardless of where it is available.

Assigning the reading list
If you have been tasked with entering the reading list but are not the person in charge of it you may need to assign the reading list to its true owner. To do this go to the edit button at the top of the list and select “assign list owner”.

Type the name of the new list owner in the box and click save.

Good to know: You can only assign a list to someone who already has ORLO permissions. Contact your library to organise training and permissions.

Ambiguities in reading lists
Sometimes there are mistakes or ambiguities in reading lists and it’s difficult to know what the academic meant.

- If you can find a likely match in SOLO, WorldCat or Amazon – add the item in the normal way. Then add a query in “Library notes”. It’s helpful to preface this with CORRECT ITEM? E.g. “CORRECT ITEM? Title seems correct but author name on original list was Smith and this book is by Smithson!” or “CORRECT ITEM? Title/Author and edition is correct but publication date on reading list is 2010 and this is 2011”.
- If you are really not sure which item is meant – add the item manually (See Manually create bookmarks) and then include a note to say “CORRECT ITEM? – Could not find this item on SOLO, Worldcat or Amazon”.

Error codes
As previously mentioned, sometimes some of the information on the reading list or in the catalogue is unclear. It is important to still add these items but also to let the library and administration staff know there is an issue. Please use the following error codes in the library notes field so those reviewing the list know what the issue is.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDITIONS</td>
<td>The edition differs from the one supplied</td>
</tr>
<tr>
<td>AUTHOR</td>
<td>The author differs or is unclear</td>
</tr>
<tr>
<td>CORRECT ITEM?</td>
<td>You are unsure if you have found &amp; bookmarked the correct item.</td>
</tr>
</tbody>
</table>