



Palace Collection Manager

PALACE COLLECTION MANAGER: CREATING LISTS AND LANES

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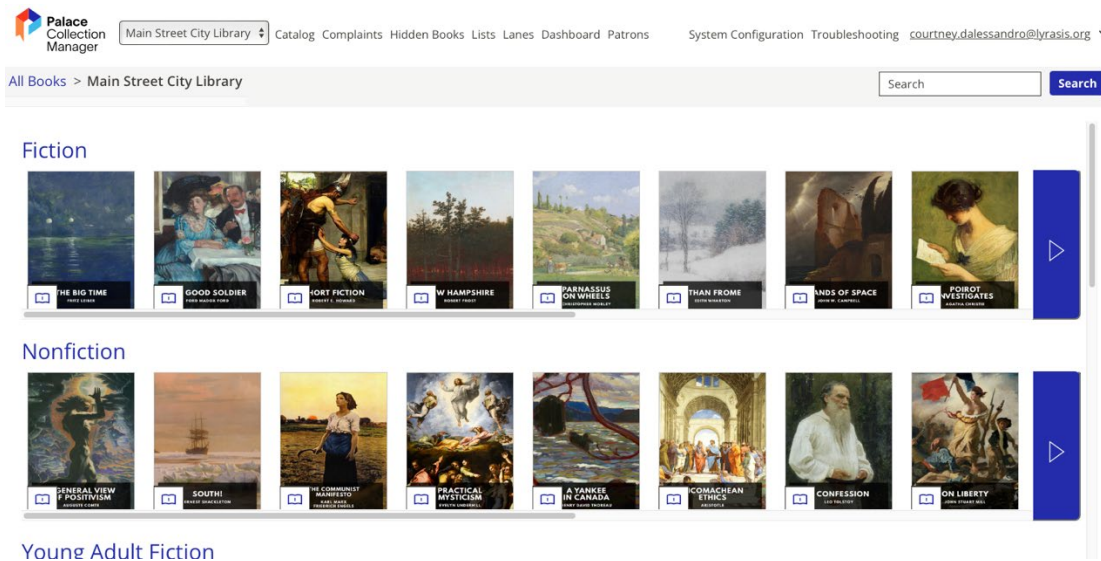
Introduction to Lists and Lanes

Administrators of your Palace Collection Manager can edit your library's Lists and Lanes.

When your library is initially configured, the Lists and Lanes are prepopulated from the Palace Bookshelf, as well as items from your own collections that are configured in the Palace app (i.e., OverDrive, Baker & Taylor, Palace Marketplace, etc.).

Lists are the building blocks for lanes—a list must be created before creating a lane!

What is a lane? The “swim lanes” appear on the main screen of the Palace app (and are one of the first thing your patrons see) and the Palace Collection Manager. The lanes serve to highlight content from your collection!

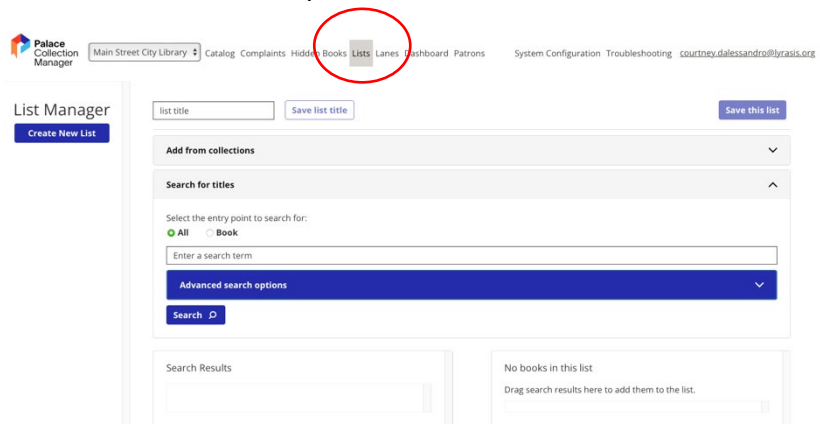


The following steps will help guide in creating lists and lanes:

- Step 1: Create a list
- Step 2: Populate the list
- Step 3: Save the list
- Step 4: Create the lane

Creating a List

To create a list, click on the Lists tab at the top of the screen.



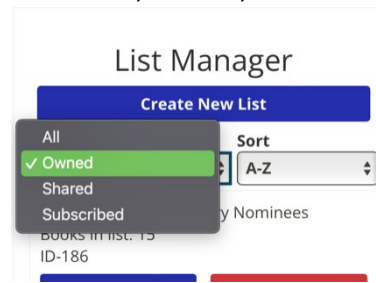
Palace Manager: Lists and Lanes

The List Manager, located on the left side of the screen, will contain any lists you create and lists that are shared with your library. Use the dropdown menu to toggle between owned, shared, and subscribed lists.

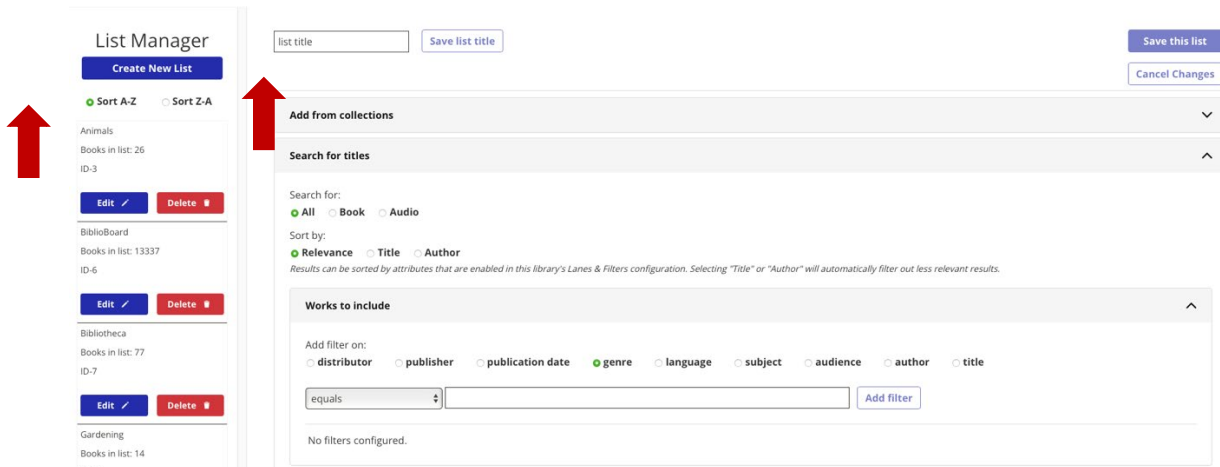
Owned: lists you own

Shared: lists you've shared

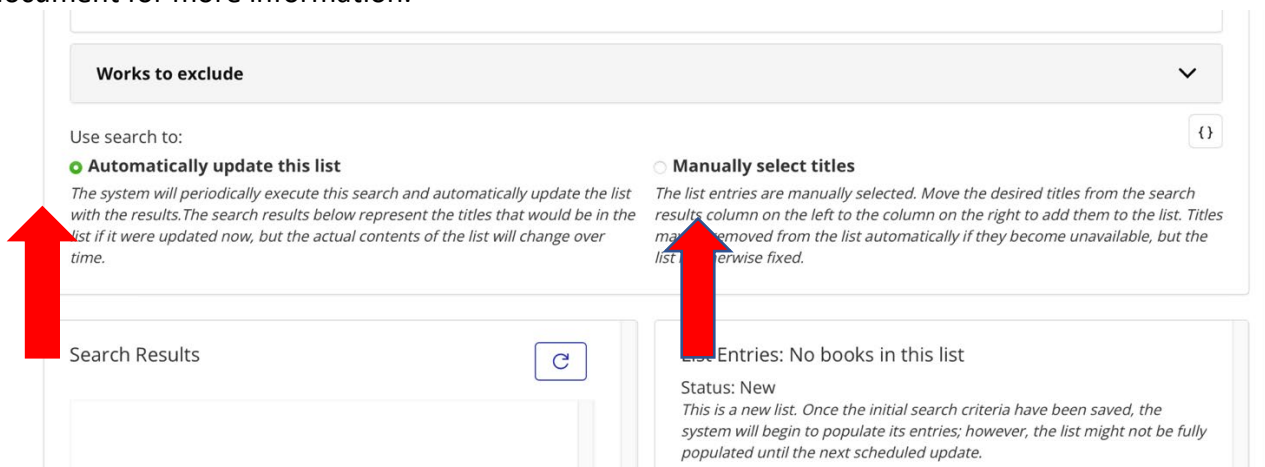
Subscribed: lists shared with you by other libraries



The right of the screen contains the tools to build lists from titles available in your collections. To create a new list, click on the blue “Create New List” found under the List Manager. Or, on the right side of the screen, enter a list title in the “list title” box then click “Save list title”.



Before searching for specific materials, decide if you would like to manually add titles to a list or create a list that will be automatically updated with your search criteria. The system will default to automatically update list, and this cannot be changed once the list is created and saved. See section called “[Auto-Updating Lists](#)” in this document for more information.



Manually selecting titles


To search for specific titles, use the search box under the heading “Search for titles”. You can search for audiobooks and eBooks using the “All” button, just books, or only audiobooks. You can choose to sort the results by Relevance, Title, or Author.

When searching you can filter the works to include any of the following: distributor, publisher, publication date, genre, language, subject, audience, author, title. You can use the dropdown box to choose “equals to”, “contains”, etc. to limit your results. You may also add filters by clicking on the Add Filter button next to the entry field. You have the option to exclude works using the same filters.

Sort by:
 Relevance Title Author
Results can be sorted by attributes that are enabled in this library's Lanes & Filters configuration. Selecting "Title" or "Author" will automatically filter out less relevant results.

Works to include ^

Add filter on:
 distributor publisher publication date genre language subject audience author title

equals 

No filters configured.

Works to exclude ^

Add filter on:
 distributor publisher publication date genre language subject audience author title

equals

No filters configured.

After searching, your results will display below in the Search Results box. From there, you can drag and drop titles you want to include in your list or use the “Add to list +” button.

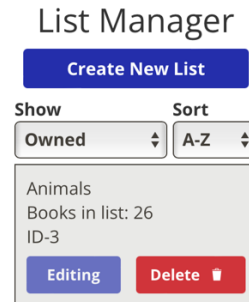
Search Results ↓

<input type="checkbox"/> Cat and Dog: Dog is cold Elke and René Lesink	<input type="button" value="View details"/> <input type="button" value="Add to list +"/>
<input type="checkbox"/> Don the Dirty Dog Richard Jones, Alison Gee	<input type="button" value="View details"/> <input type="button" value="Add to list +"/>
<input type="checkbox"/> Cat and Dog and the butterfly Elke and René Lesink	<input type="button" value="View details"/> <input type="button" value="Add to list +"/>
<input type="checkbox"/> Cat and Dog and the Ball Elke and René Lesink	<input type="button" value="View details"/> <input type="button" value="Add to list +"/>

No books in this list
Drag search results here to add them to the list.

Palace Manager: Lists and Lanes

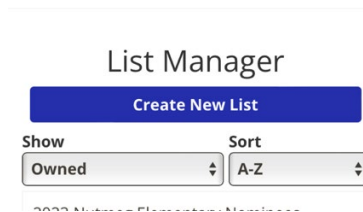
Once you've finished adding titles to your list, scroll to the top of the page and click the blue "Save this list" button on the top right. You can edit and delete lists as shown below.



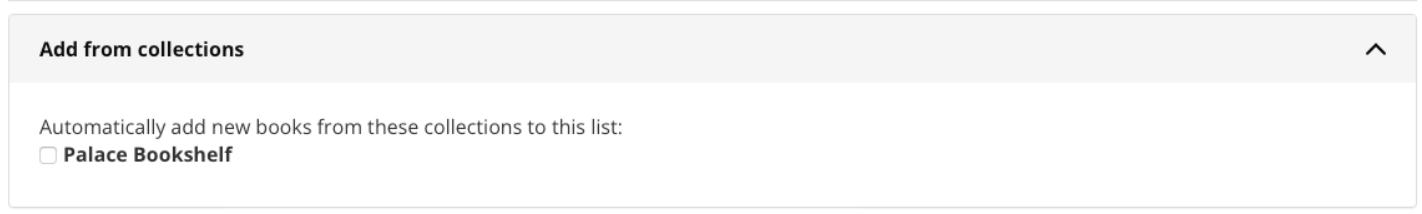
Creating a list from a collection

You can also create lists from collections. For example, if your library purchases from the Palace Marketplace and you'd like to highlight new titles from a purchase, you can create a list **before** placing your order. Once the titles from the order import, they will be automatically added to a list. That list can then be added to a lane, such as "New Titles".

To create another new list, click on the blue "Create New List" box under the List Manager on the left side of the screen.



Navigate to the "Add from collections" box and click the down arrow located to the right to open the menu. Check the box next to the appropriate collection then save your list.

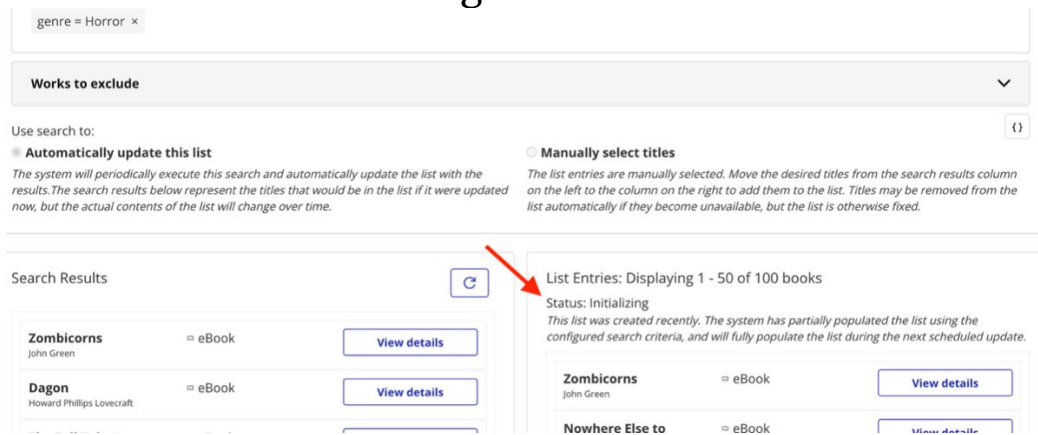


Auto-Updating Lists

Lists can be configured to be automatically updated using the supplied search criteria.

The status of an automatically updating list is displayed at the top of the List Entries area:

Palace Manager: Lists and Lanes



The screenshot shows the 'Palace Manager: Lists and Lanes' interface. At the top, there is a search filter for 'genre = Horror'. Below this is a 'Works to exclude' dropdown menu. The 'Use search to:' section has two radio buttons: 'Automatically update this list' (selected) and 'Manually select titles'. The 'Automatically update this list' option has a sub-note: 'The system will periodically execute this search and automatically update the list with the results. The search results below represent the titles that would be in the list if it were updated now, but the actual contents of the list will change over time.' The 'Manually select titles' option has a sub-note: 'The list entries are manually selected. Move the desired titles from the search results column on the left to the column on the right to add them to the list. Titles may be removed from the list automatically if they become unavailable, but the list is otherwise fixed.'

The 'Search Results' section on the left shows a table with the following entries:

Title	Author	Format	Action
Zombicorns	John Green	eBook	View details
Dagon	Howard Phillips Lovecraft	eBook	View details

The 'List Entries' section on the right shows a table with the following entries:

Title	Author	Format	Action
Zombicorns	John Green	eBook	View details
Nowhere Else to		eBook	View details

A red arrow points from the 'C' icon in the 'Search Results' section to the 'List Entries' section.

The list status can be one of the following:

- New**
 The system will begin to populate this list using the configured search criteria when it is saved and will fully populate the list during the first scheduled update that occurs after it has been saved.
- Initializing**
 This list was created recently. The system has partially populated the list using the configured search criteria and will fully populate the list during the next scheduled update.
- Repopulating**
 The search criteria for this list were changed recently, but the entries have not yet been updated. The system will repopulate the list using the current search criteria during the next scheduled update.
- Updated**
 This list was fully populated during the last scheduled update, using the configured search criteria and the titles that were available at the time. Titles that have been acquired since the last update will be added to the list during the next scheduled update.
- Search criteria modified**
 There are unsaved changes to the search criteria for this list. The system will repopulate the list using the new search criteria during the first scheduled update that occurs after it has been saved.

The status begins at **New** when a new list is being edited. After the new list is saved, the status changes to **Initializing**. It then changes to **Updated**, following the first scheduled list update that occurs on the Palace Collection Manager after the list was created.

If the search criteria for an existing automatically updating list are modified, the status changes to **Search criteria modified** while editing is in progress. Once the changes are saved, the status changes to **Repopulating**. It then changes to **Updated**, following the first scheduled list update that occurs on the CM after the modified search criteria were saved.

Palace Manager: Lists and Lanes

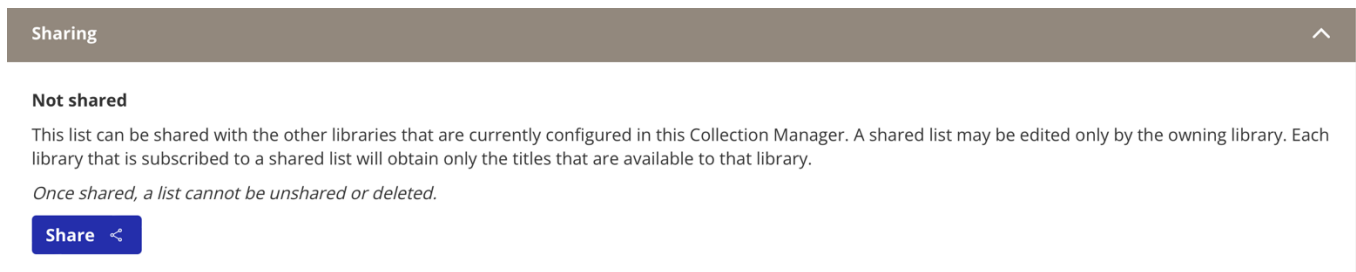
Sharing a List

Lists can be shared with other libraries on the same Palace Collection Manager. A shared list may be edited only by the owning library. Each library that is subscribed to a shared list will obtain only the titles that are available to that library.

Once shared, a list cannot be unshared or deleted.

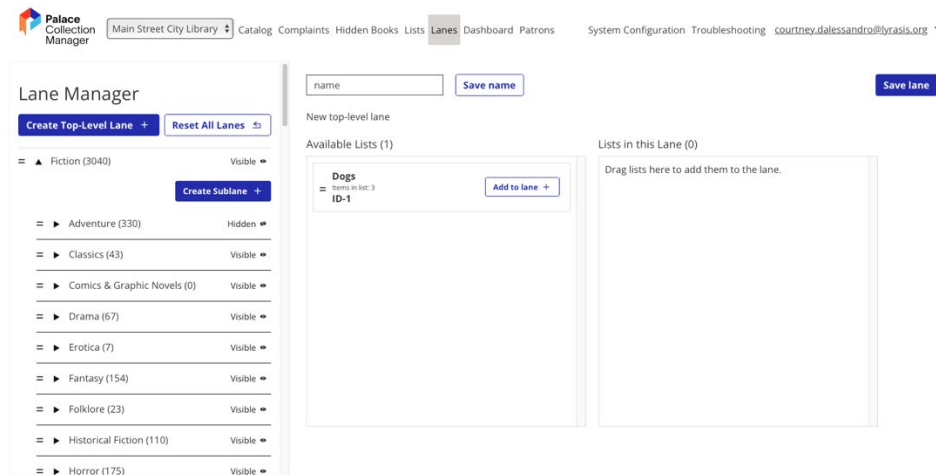
Sharing a list again will make it available to any libraries that have been registered in this Collection Manager since the list was last shared. This is useful if a new library signs on to participate in The Palace Project.

To share a list, click on Editing next under the list name in the List Manager. Open the Sharing menu and click on Share.



Creating a Lane

Reminder: a list must be created before creating a lane! To begin, click on Lanes at the top of the screen. Your screen will look like this:

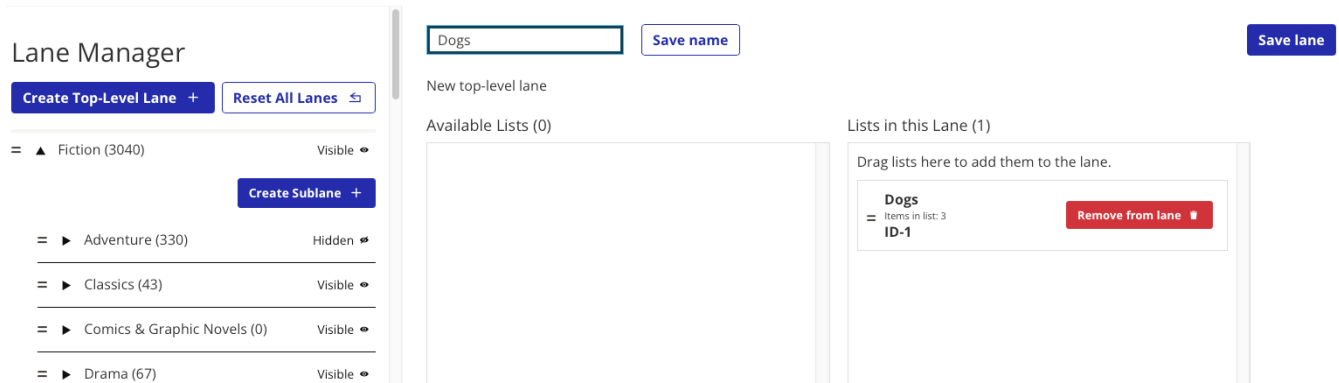


The Lane Manager is on the left side of the screen. In this area, you can create new top-level lanes, sublanes, move existing sublanes to a top-level lane, hide or show top-level lanes, and reorder lanes. Please note that when you click on “Create Top-Level Lane” or “Create Sublane” the screen on the right will change to reflect the type of lane you want to create.

To create a new lane, on the right side of the screen, enter a list name in the name box and click “Save Name”. Then move the appropriate list, found in the Available Lists box to the Lists in this Lane box. You can use the

Palace Manager: Lists and Lanes

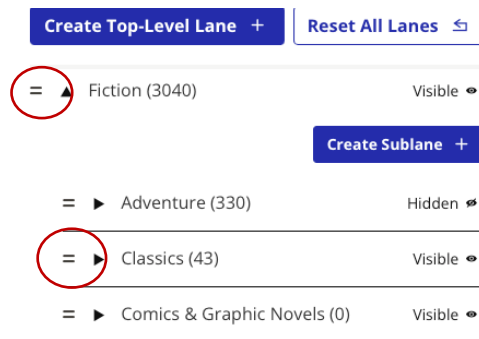
“Add to lane” button or drag the list to the “Lists in this lane” box. When you have finished adding a list or lists click “Save lane”. The lane will now appear under the Lane Manager.



Managing Lanes in the Lane Manager

Reordering Lanes

You can move lanes by grabbing the = sign to the left of the lane and dragging the lane to a new spot. You can also use this drag/drop function to move a sublane to a top-level lane.



Lane Visibility

You can hide lanes at your choosing. Simply click on the “Visible” button to the right of the lane to hide the lane. To turn the visibility back on, click on the “Hidden” button. Hidden lanes will not be accessible to patrons in the Palace mobile app but allow lanes to be created in advance for special reading campaigns, local events, or other reading initiatives.

