



# Palace Collection Manager

## PALACE COLLECTION MANAGER: CREATING LISTS AND LANES

# Palace Manager: Lists and Lanes

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## Palace Manager: Lists and Lanes

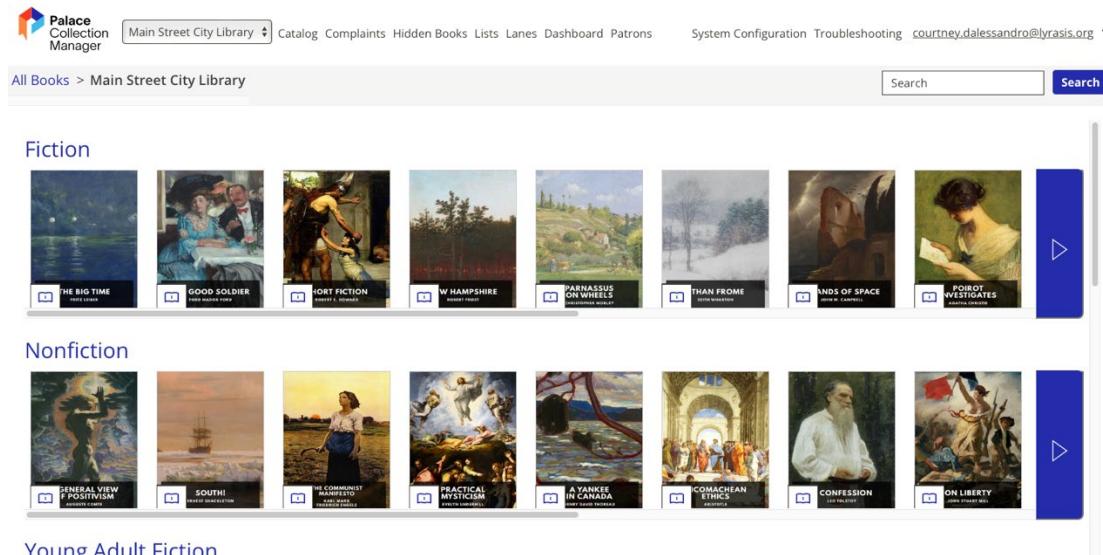
### Introduction to Lists and Lanes

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 screenshot shows the Palace Collection Manager interface with the following navigation bar:

- Main Street City Library
- Catalog Complaints Hidden Books Lists Lanes Dashboard Patrons
- System Configuration Troubleshooting [courtney.dalessandro@lyrasis.org](mailto:courtney.dalessandro@lyrasis.org)

Below the navigation bar, the page title is "All Books > Main Street City Library". There is a search bar with a "Search" button.

The main content area displays three lanes:

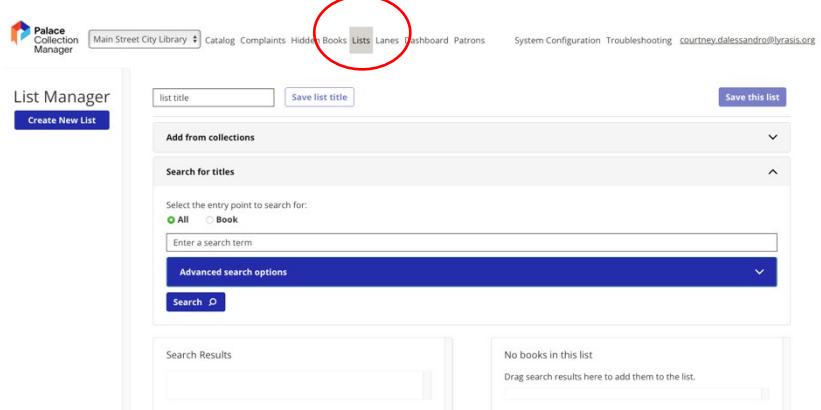
- Fiction**: Contains 8 book covers.
- Nonfiction**: Contains 8 book covers.
- Young Adult Fiction**: Contains 8 book covers.

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.



The screenshot shows the List Manager interface with the following navigation bar:

- Main Street City Library
- Catalog Complaints Hidden Books **Lists** Lanes Dashboard Patrons
- System Configuration Troubleshooting [courtney.dalessandro@lyrasis.org](mailto:courtney.dalessandro@lyrasis.org)

The main content area is titled "List Manager" and includes the following sections:

- Create New List**
- List Manager** (with a "list title" input field and "Save list title" button)
- Add from collections**
- Search for titles** (with "Select the entry point to search for:" dropdown set to "All", a search term input field, and "Advanced search options" button)
- Search Results** (with the message "No books in this list. Drag search results here to add them to the list.")

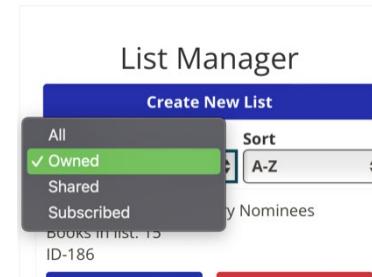
## Palace Manager: Lists and Lanes

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”.

The screenshot shows the List Manager interface. On the left, there's a sidebar with three lists: 'Animals' (Books in list: 26, ID-3), 'BiblioBoard' (Books in list: 13337, ID-6), and 'Gardening' (Books in list: 14). On the right, there's a large form for creating a new list. It includes fields for 'list title' (with 'Save list title' and 'Cancel Changes' buttons), 'Add from collections' (with a dropdown menu), 'Search for titles' (with search filters for 'All', 'Book', 'Audio', 'Relevance', 'Title', 'Author'), and 'Works to include' (with a dropdown menu for 'Add filter on' like 'distributor', 'publisher', 'publication date', 'genre', etc.). Red arrows point to the 'Create New List' button in the sidebar and the 'list title' input field in the main form.

**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.

The screenshot shows the 'Works to exclude' section and the 'Search Results' section. In the 'Works to exclude' section, there are two options: 'Automatically update this list' (selected) and 'Manually select titles'. A red arrow points to the 'Automatically update this list' option. In the 'Search Results' section, there is a message: 'Entries: No books in this list' and 'Status: New'. Below that, there is a note: 'This is a new list. Once the initial search criteria have been saved, the system will begin to populate its entries; however, the list might not be fully populated until the next scheduled update.' A red arrow points to the 'Manually select titles' option.

## Palace Manager: Lists and Lanes

### 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**

**Add all to list** 

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

List Manager

**Create New List**

Show	Sort
Owned	A-Z

Animals  
Books in list: 26  
ID-3

**Editing**   **Delete**

### 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.

List Manager

**Create New List**

Show	Sort
Owned	A-Z

Add from collections

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.

**Add from collections**

Automatically add new books from these collections to this list:

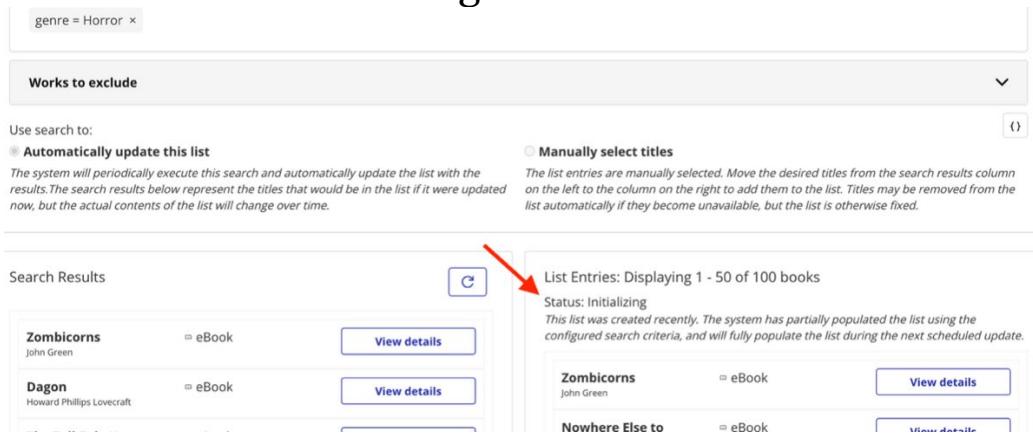
Palace Bookshelf

### 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 interface with a search bar at the top containing "genre = Horror". Below the search bar, there are two sections: "Works to exclude" and "Search Results". Under "Search Results", there are two items: "Zombicorns" by John Green (eBook) and "Dagon" by Howard Phillips Lovecraft (eBook). Each item has a "View details" button. A red arrow points from the "Search Results" section to the "List Entries" section. The "List Entries" section is titled "List Entries: Displaying 1 - 50 of 100 books" and shows the status "Status: Initializing". It includes a note: "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." Below this note, there is another list entry for "Zombicorns" by John Green (eBook), which also has a "View details" button.

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

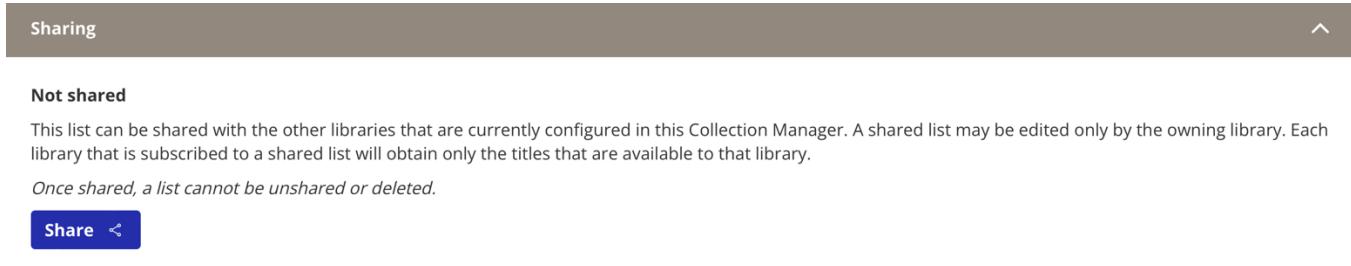
### Sharing a List

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.

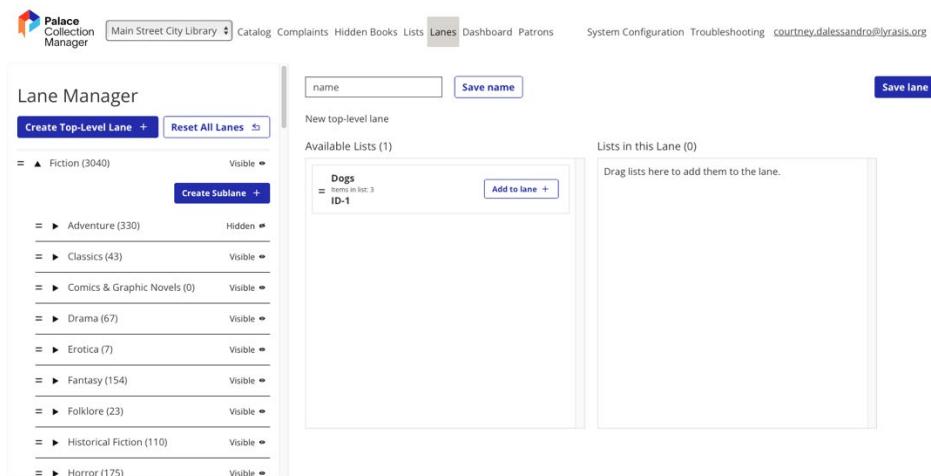
To share a list, click on Editing next under the list name in the List Manager. Open the Sharing menu and click on Share.



The screenshot shows a 'Sharing' page for a list. At the top, there's a header bar with the title 'Sharing'. Below it, a section titled 'Not shared' contains the text: 'This list can be shared with the other libraries that are currently configured in this 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.' Below this text is a note: 'Once shared, a list cannot be unshared or deleted.' At the bottom left is a blue 'Share' button with a right-pointing arrow icon.

### 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:



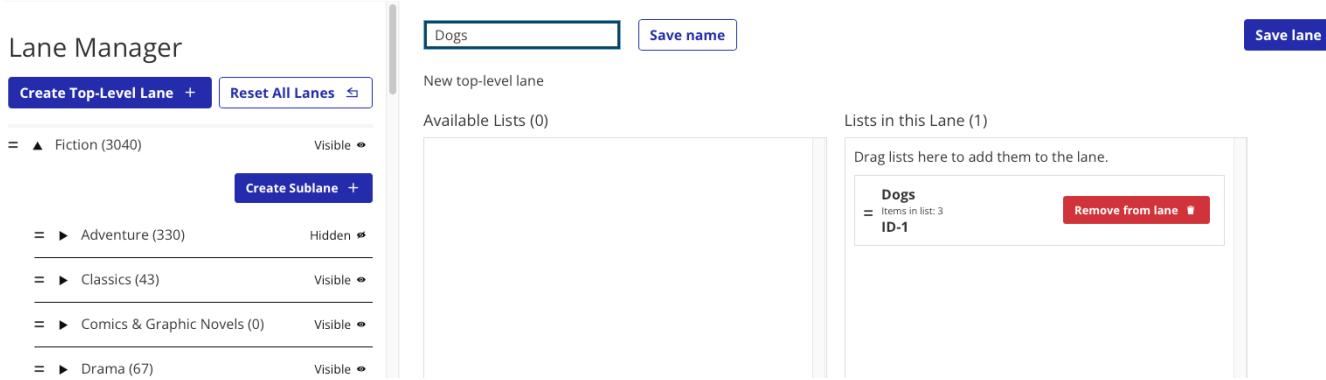
The screenshot shows the Lane Manager interface. At the top, there's a navigation bar with the Palace Collection Manager logo, the library name 'Main Street City Library', and links for Catalog, Complaints, Hidden Books, Lists, Lanes (which is the active tab), Dashboard, Patrons, System Configuration, Troubleshooting, and an email address 'courtney.dalessandro@lyrasis.org'. On the left, the 'Lane Manager' sidebar lists existing lanes: Fiction (3040), Adventure (330), Classics (43), Comics & Graphic Novels (0), Drama (67), Erotica (7), Fantasy (154), Folklore (23), Historical Fiction (110), and Horror (175). Each lane has a visibility dropdown set to 'Visible'. On the right, there's a 'Create Top-Level Lane' form with a 'name' input field and a 'Save lane' button. Below it, a 'New top-level lane' section is shown. Under 'Available Lists (1)', there's a box for 'Dogs' with a note '3 items in list: ID-1' and an 'Add to lane' button. A large area on the right is labeled 'Lists in this Lane (0)' with the instruction 'Drag lists here to add them to the lane.'

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.



The screenshot shows the Palace Manager interface. On the left, the "Lane Manager" displays a list of top-level lanes: Fiction (3040), Adventure (330), Classics (43), Comics & Graphic Novels (0), and Drama (67). Each lane has a visibility dropdown set to "Visible". A "Create Sublane" button is available for each lane. On the right, a new lane is being created with the name "Dogs" in a text input field. A "Save name" button is next to it, and a "Save lane" button is at the top right. Below the input fields, a section titled "Available Lists (0)" is shown. To the right, a box titled "Lists in this Lane (1)" contains the list "Dogs" with the ID "ID-1". A "Remove from lane" button is also present.

## 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.



This screenshot shows the Lane Manager with the "Fiction" lane being moved. The equals sign (=) to its left is highlighted with a red circle, indicating it's being dragged to a new position. The other lanes are visible below it.

### 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.



This screenshot shows the Lane Manager with the "Fiction" lane visibility status highlighted with a red circle. The "Visible" button is circled, and the "Hidden" button for the "Classics" lane is also circled.