

Inmagic® *Genie* 3.30 Upgrade Notes

***Genie* 3.30 Features**

Genie 3.30 contains a number of new features that are available to new customers immediately. Existing customers will have to enable most of the new features they want to use, as the installation process leaves in place any customizations to their previous versions(s) of Genie.

When Genie is first installed, the configurable screens, reports, and other parameters are defined in a series of CONFIG files: Genie.CONFIG, Queries.CONFIG, Reports.CONFIG, etc. A copy of each of these files is made, with a "My" prefix: MyGenie.CONFIG, MyQueries.CONFIG, etc. Customizations are made in the My* copies, as the software looks in these files first, only looking in the non-My versions if there is no My version.

When Genie is upgraded to a new version, updated non-My CONFIG files are installed but the My versions are left alone, thus preserving any customizations that have been made.

This document describes some of the new Genie features and the changes that need to be made in the My* CONFIG files to enable each one. The Genie installation notes include a complete list of the textbase and configuration changes needed to fully upgrade to v3.30. A subset of those changes are documented here, with additional explanation and screenshots to help you verify that the desired changes have been made.

Remember to either restart IIS or WWW after changing CONFIG files, or click the Reset button on the Genie About screen.

OPAC “Simple Search”

This feature permits end users to enter queries without using Boolean symbols between words, similar to the way searches are entered on the Web using sites such as Google or AltaVista.

Expose this feature by copying the following QueryScreen element from Queries.CONFIG to MyQueries.CONFIG:

```
<inmg:QueryScreen Name="alt_opac_search" Title="Alternate Catalog Search"
  AlternateSyntax="true">
  <QueryField Type="QueryField" Display="Any word(s)" . . . />
  <SearchTips ShowTips="true" ShowTitle="true" ShowIcon="true" Title="Search Tips"
    ImageURL="Images/xp_bulb.gif" UseDefaultTips="false" ShowHelpLink="false"
    TipContent="Type word(s) to find. End a word with * to find words beginning with
    that word, such as 'comput*'. Surround phrases with quotation marks." />
</inmg:QueryScreen>
```

You may wish to change the screen title and/or the screen tips. Also either add this query screen to the list of OPAC query screens near the bottom of this file, or use it to replace them. We recommend replacing them (as shown below), to avoid confusing your users with a selection of query screens having different behavior.

```
<inmg:QueryScreens TextbaseName="opac">
  <inmg:QueryScreen Name="alt_opac_search"></inmg:QueryScreen>
</inmg:QueryScreens>
```

The following screen shot shows the new simple OPAC query screen.

Inmagic Genie: Catalog

▶ Alternate Catalog Search

Any Word(s)

Record Type

Submit Query Reset

0 item(s) in Cart

Search Tips

Type word(s) to find. End a word with * to find words beginning with that word, such as 'comput*'. Surround phrases with quotation marks.

INMAGIC Genie
part of DB/Text[®] Library Suite

To use this syntax with other query screens, make the following changes to the QueryScreen element in MyQueries.CONFIG:

- Add this attribute to the QueryScreen element: AlternateSyntax="true" (required)
- Turn off Browse buttons on each QueryField element: ShowBrowse="false" (recommended) (Reason: These don't appear on public sites such as Google or AltaVista, and they would expose the "plumbing": the fields and indexes being searched.)
- Turn off Boolean dropdown lists on each QueryField element: ShowBoolean="false" (recommended) (Reason: the assumption is that users more comfortable with the alternate syntax would find these confusing.)

Stop Words

Note that one more change is needed in order for this feature to work properly. Stop Words must be ignored. They are OK when typed inside a quoted phrase such as "north by northwest", but not if typed outside of a quoted phrase, UNLESS Genie knows which stop words to ignore when processing a query. Provide this information in a new element in MyGenie.CONFIG:

```
<!-- stop word list (used with alternate search syntax) -->
<add key="stopwords" value="a an and by for from in of the to with"/>
```

Separate the stop words with spaces. The example above shows the stop word list used in the Catalog textbase that ships with Genie. Check the actual list of stop words used in your Catalog textbase by opening the textbase using TextWorks and viewing Textbase Information (on the Display menu). Find the stop word list below the list of fields defined in the textbase:

```
Log file enabled, showing 'CatID' and 'CatTitle'
Leading articles: a an the
Stop words: a an and by for from in of on the to with
XML Match Fields:
  1. CatID
```

Searching Items

The ability for OPAC users to search for items is not enabled by default. If your OPAC has this feature enabled, consider modifying the opac_items_search screen to use the new syntax as well. Follow the steps described above for applying the alternate syntax rules:

```
<inmg:QueryScreen Name="opac_items_search" Title="Item Search"
  BrowseButtonText=" Browse " BooleanAnd="AND" BooleanOr="OR" BooleanNot="NOT"
  AlternateSyntax="true">
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="false" ShowBoolean="false"
    FieldList="CatTitle.ItemCatID"/>
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="false" ShowBoolean="false"
    FieldList="CatRecordType.ItemCatID"/>
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="false" ShowBoolean="false"
    FieldList="ItemLocation"/>
  <QueryField Type="ButtonRow" SubmitButtonText=" Submit Query "
    ResetButtonText=" Reset " CssClass="submit_button"/>
</inmg:QueryScreen>
```

Serials Workflow Improvements

A number of features were added to Genie 3.3 to improve the serials management process and save steps.

Serials Setup: Add Link from Catalog Edit to Serials Setup

You can add a button linking from the Catalog edit screen to a serial record you have just created by clicking Create Serial Record. In MyEditScreens.CONFIG, find the Catalog edit screen definition, scroll down to the subsection names "Serials", find the row containing the "Create Serial Record" button, and add a new row below it, shown in blue below:

```
<Field>%%StartRow</Field>
<Field Display="Create Serial Record" style="font:normal"
  Align="Center">%%CreateSerial</Field>
<Field>%%EndRow</Field>
<Field>%%StartRow</Field>
<Field Display="Edit Serial Record" style="font:normal"
  Align="Center">%%EditSerial</Field>
<Field>%%EndRow</Field>
```

The new link only appears after you create a new Serial record:

Inmagic Genie: Edit Catalog Record

Catalog Search > Search Results > Edit Catalog Record 46

► Data Entry Toolbar

Save New Delete Duplicate Prev Next

Edit Items

Serials textbase has been updated.

Biblio 1 Biblio 2 Physical **Serials**

Frequency
Bimonthly

Issues per Volume [Browse]
6

Holdings
v.11, no.1, 1988-v.25, no.6, 2002

Retention Policy
Library keeps current year + two prior years

[Check for Serial Records](#)

[Create Serial Record](#)

[Edit Serial Record](#)

Corresponding Serial Records
*1 routed to Porter, Nancy B., etc.
*[no copy or routing info]

Also add a Close button to the serials_setup screen:

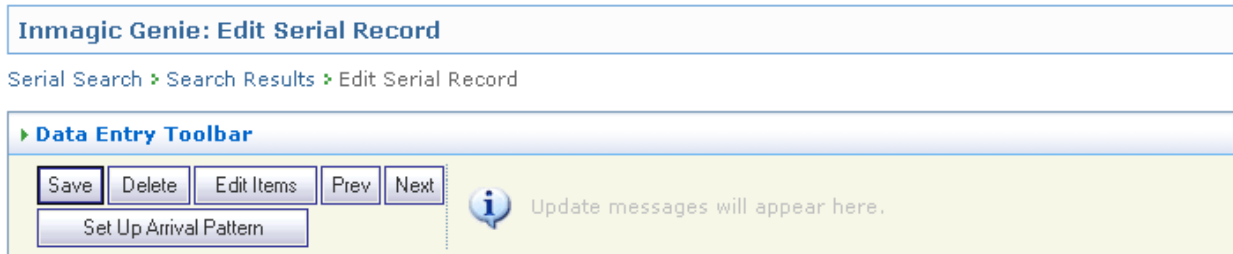
```
<inmg:EditScreen Name="serials_setup" TitleForEdit="Set Up Serial Arrival Pattern"
  TitleForAdd="Set Up Serial Arrival Pattern" TitleCss="tblheader">
  <Toolbar Title="Data Entry Toolbar" ButtonCellwidth="250">
    <Button Name="GenerateDates" Text="Generate Dates"/>
    .
    .
    .
    <Button Name="Close" Text="Close" />
  </Toolbar>
```

Clicking the new button on the Catalog edit screen will bring up the new Serial record in the setup screen in a new window. After editing the record, save your changes and click the Close button.

Serials Setup: Add Link from Serials Edit to Serials Setup

You can add a button linking from the Serials edit screen to the Serials setup screen. Modify the serials_edit screen definition in MyEditScreens.CONFIG:

```
<inmg:EditScreen Name="serials_edit" TitleForAdd="Add New Serial"
  TitleForEdit="Edit Serial Record" TitleCss="tblheader">
  <Toolbar Title="Data Entry Toolbar">
    <Button Name="Add" Text="Add Record"/>
    <Button Name="Save" Text="Save"/>
    <Button Name="Delete" Text="Delete"/>
    <Button Name="EditItem" Text="Edit Items" />
    <Button Name="PrevRecord" Text="Prev"/>
    <Button Name="NextRecord" Text="Next"/>
    <Button Name="Setup" Text="Set Up Arrival Pattern" NewRow="true" />
  </Toolbar>
```



Serials Setup: Arrival Date Prediction

Two new date patterns are available by modifying MyGenie.CONFIG:

```
<SerialFrequency>
  <Frequency Pattern="X1" Display="" Default="true" />
  <Frequency Pattern="Y1" Display="Annual" />
  .
  .
  .
  <Frequency Pattern="D1" Display="Daily" />
  <Frequency Pattern="D1 -d1" Display="Daily (no Sundays)" />
  <Frequency Pattern="D1 -d1,7" Display="Daily (no weekends)" />
  <Frequency Pattern="XX" Display="Irregular" />
</SerialFrequency>
```

To create other patterns that omit specific days of the week, see the Inmagic Genie Technical Notes. It is not possible to omit weeks or months, or to add weeks, months, or days.

In 3.3 it is also possible to generate issue numbers without volume numbers. Add an IssueOnlyFormat key to MyGenie.CONFIG:

```
<!-- Formatting information for volume/issue information appended to expected
arrival dates for serial issues -->
<add key="VolumeIssueFormat" value=": v. {v}, no. {i}" />
<add key="IssueOnlyFormat" value=": no. {i}" />
<add key="MovedIssueFormat" value="{d} (expected), {t} (recd): {v}" />
<add key="MissingIssueFormat" value="{d} (expected): {v}" />
```

Then, when generating dates, omit the starting volume number.

Serials Setup: Multiple Copies

If you have multiple subscriptions for the same periodical, you can generate arrival dates for one copy and update all of the other copies as well. Add this button to the serials_setup screen in MyEditScreens.CONFIG:

```
<inmg:EditScreen Name="serials_setup" TitleForEdit="Set Up Serial Arrival Pattern"
  TitleForAdd="Set Up Serial Arrival Pattern" TitleCss="tblheader">
  <Toolbar Title="Data Entry Toolbar" ButtonCellwidth="250">
    <Button Name="GenerateDates" Text="Generate Dates"/>
    <Button Name="Add" Text="Add Record"/>
    <Button Name="Save" Text="Save"/>
    <Button Name="SaveAll" Text="Save All"/>
    <Button Name="Duplicate" Text="Duplicate"/>
    <Button Name="PrevRecord" Text="Prev"/>
    <Button Name="NextRecord" Text="Next"/>
    <Button Name="Close" Text="Close" />
  </Toolbar>
```

On the Serials Setup screen, if there are multiple subscriptions linked to the same Catalog ID, a message appears and the Save All button is enabled. After generating dates, click Save All to save the new dates in each of the subscription records.

Inmagic Genie: Set Up Serial Arrival Pattern

Serial Search > Search Results > Edit Serial Record > Set Up Serial Arrival Pattern

Data Entry Toolbar



Serial Fields

* Title

Computers in Libraries

Copy

1

Start Date

Jun 2009

Starting Volume

25

Supplier

Research Periodicals & Book Services, ▼

Duration (months)

12

Starting Issue

1

Frequency

Monthly ▼

Issues per Volume

12

Issues Expected

Routing List [\[Browse\]](#)

*Rooney, Marta C.
*Shapiro, Carl L.
*Bishop, Barbara J.
*Bernstein, Peter L.

Serials Routing: Maintenance

A new report supports adding or removing a specific borrower on the routing list for selected serials. Add this report to MyReports.CONFIG:

```
<!-- SerialsRouteMaint Report: used to select journals to add/remove borrower -->
<inmg:Report Name="SerialsRouteMaint" ShowItemNumber="false" PageSize="20"
  SelectAll="true" ClearAll="true"
  AddButton="true" AddButtonText="Add to Selected Routing Lists"
  RemoveButton="true" RemoveButtonText="Remove from Selected Routing Lists">
  <ActionInfo Type="Update" Trigger="AddButton" Field="SerRouteList"
    UpdateAction="append" Entry="last" Text="[BorrName]" />
  <ActionInfo Type="Update" Trigger="RemoveButton" Field="SerRouteList"
    UpdateAction="delete" Entry="matching" OldText="[BorrName]" />
  <Field Name="SerTitle" Style="font-weight:bold" />
  <Field Name="SerCopy" Header=" (" Footer=")" />
  <Field width="620" CellSpacing="0" CellPadding="0">%%StartTable</Field>
  <Field Align="Left" width="25" vAlign="Top">%%StartColumn</Field>
  <Field BindingField="SerTitle">%%CheckBox</Field>
  <Field>%%EndColumn</Field>
  <Field Align="Left" vAlign="Top">%%StartColumn</Field>
  <Field Name="SerID" Visible="false" />
  <Field Name="SerRouteList" Separator="; " />
  <Field>%%EndColumn</Field>
  <Field>%%EndTable</Field>
</inmg:Report>
```

Also add it to the list of available Serials reports:

```
<inmg:ReportList TextbaseName="Serials">
  <Report Name="SerialsBrief" Display="Serials Brief"/>
  <Report Name="SerialsCheckInOrSkip" Display="Check In or skip Serials"/>
  <Report Name="SerialsRouteMaint" Display="Maintain Routing Lists" />
</inmg:ReportList>
```

Inmagic Genie: Serials

Serial Search Search Results

4 records found.

Maintain Routing Lists ?

[Select all](#) | [Clear all](#) | [Add to Selected Routing Lists](#) | [Remove from Selected Routing Lists](#)

Computers in Libraries

Evans, Donna M.; Cecil, Constance M.

Life sciences research report

Evans, Donna M.

LITA newsletter

DeGroot, Jeanine L.; Evans, Donna M.; Goleman, David C.; O'Malley, Sean

Online : the leading magazine for information professionals

Evans, Donna M.; Shapiro, Carl L.

[Select all](#) | [Clear all](#) | [Add to Selected Routing Lists](#) | [Remove from Selected Routing Lists](#)

Type the borrower name in the text box to the right of the form dropdown list, or use the ? button to browse for a name. The borrower name is already populated if this screen was accessed from a link on the Borrower full display page. See below.

To show the periodicals routed to a borrower on the full display, add a SerialInfo element to the BorrowerFull report in MyReports.CONFIG. To add a link to the Serials query screen and routing list management report, add a ShowManageRouteListLink attribute to the Report element:

```
<!-- BorrowerFullReport -->
<inmg:Report Name="BorrowerFull" ShowManageRouteListLink="true">
  <Field Name="BorrName" Header="&lt;b&gt;" Footer="&lt;/b&gt;" ... />
  <Field Name="BorrID" Display="ID"/>
  .
  .
  .
  <SerialInfo Heading="Serials Routed" ShowItemNumber="true">
    <Field Name="SerTitle" Footer="." />
    <Field Name="SerCopy" Header=" Copy: " Footer="." />
    <Field Name="SerRouteList" Header=" Routed to: " Separator="; " Footer="." />
  </SerialInfo>
</inmg:Report>
```

Inmagic Genie: Borrowers

[Borrower Search](#) > [Search Results](#) > [Full Display](#)

Search Results : Full Display Format

Record 1 of 1

Name	Evans, Donna M.
ID	1015
Borrower No.	753951
Department	Sales
Telephone	231
Mail Stop	J-102
Address	23 F St.
City	Arlington
State/Province	MA
ZIP/Postal Code	02474
Date Created	4 Apr 2005
Last Modified	5 Mar 2009

Serials Routed

1. Computers in Libraries. Routed to: Evans, Donna M.; Cecil, Constance M.
2. Life sciences research report. Routed to: Evans, Donna M.
3. LITA newsletter. Routed to: DeGroot, Jeanine L.; Evans, Donna M.; Goleman, David C.; O'Malley, Sean.
4. Online : the leading magazine for information professionals. Routed to: Evans, Donna M.; Shapiro, Carl L.

[Manage route lists for borrower](#)



[Edit this record](#)

Serials Routing: Adding Borrower Location

You can add the borrower's office number or other Borrower field after the borrower's name in a printed routing list. The following example adds the mail stop after the borrower name on the Route1on8.5x11 report, separated from the name by ".....".

```
<!-- Route1on8.5x11 -->
<inmg:Report Name="Route1on8.5x11" PageBreak="true" MarkAsRouted="true">
  <Field>%%StartTable</Field>
  <Field Align="Center">%%StartColumn</Field>
  <Field Display="Routing List for ">%%Label</Field>
  <Field Name="SerRouteList" Separator="&lt;br/&gt;" AddField="BorrMailStop"
    AddFieldSeparator="....." />
</inmg:Report>
```

The resulting report:

Routing List for LITA newsletter	
Date of Issue: 2 Mar 2009	Today's date: 5 Mar 2009
DeGroot, Jeanine L.....J-109	Please pass this issue on within 3 days. Cross out your name after reading, or pass on unread.
Evans, Donna M.....J-102	
Goleman, David C.....M-010	
O'Malley, Sean....M-128	

Serials Routing: Batch E-mails

Two new reports support the selection of periodicals for which to send routing notices via e-mail, and the content of that e-mail. This report displays a list of titles with checkboxes for selection:

```
<!-- SerialsRoute Report: used to select journals to route -->
<inmg:Report Name="SerialsRoute" ShowItemNumber="false" PageSize="20"
  SelectAll="true" ClearAll="true" EmailRoute="EmailSerialsRoute">
  <Field Name="SerTitle" Style="font-weight:bold" />
  <Field Name="SerCopy" Header=" (" Footer=")" />
  <Field width="620" CellSpacing="0" CellPadding="0">%%StartTable</Field>
  <Field Align="Left" width="25" VAlign="Top">%%StartColumn</Field>
  <Field BindingField="SerRouteList">%%CheckBox</Field>
  <Field>%%EndColumn</Field>
  <Field Align="Left" VAlign="Top">%%StartColumn</Field>
  <Field Name="SerID" Visible="false" />
  <Field Name="SerRouteList" Visible="false" />
  <Field Name="SerDateToRoute" Header="Date of Issue: " />
  <Field>%%EndColumn</Field>
  <Field>%%EndTable</Field>
</inmg:Report>
```

Copy this report definition from Reports.CONFIG to MyReports.CONFIG, and add it to the list of available Serials reports:

```
<inmg:ReportList TextbaseName="Serials">
  <Report Name="SerialsBrief" Display="Serials Brief"/>
  <Report Name="SerialsCheckInOrSkip" Display="Check In or skip Serials"/>
  <Report Name="SerialsRoute" Display="E-mail Routing Notices" />
</inmg:ReportList>
```

This is the resulting report:

Inmagic Genie: Serials

Serial Search ▾ Search Results

3 records found. E-mail Routing Notices ▾

[Select all](#) | [Clear all](#) | [E-mail](#)

Computers in Libraries
 Date of Issue: 1 Jul 2005 (expected), 10 Feb 2009 (recd): v. 4, no. 2

Computers in Libraries
 Date of Issue: 1 Jun 2005 (expected), 10 Feb 2009 (recd): v. 4, no. 1

LITA newsletter
 Date of Issue: 2 Mar 2009

[Select all](#) | [Clear all](#) | [E-mail](#)

The value of the EmailRoute attribute in the selection report is the name of the report that will generate the content of the e-mail. This report was specified:

```
<!-- EmailSerialsRoute Report: provides content for emailed routing notice -->
<inmg:Report Name="EmailSerialsRoute" ShowItemNumber="false" PageSize="20"
  PageBreak="true">
  <EmailInfo From="[E-mail]" ToField="SerRouteList:BorrEmail" ToName="SerRouteList"
    Subject="Routing Notice" AttachField="ToCFileName.SerToCID"
    FontName="Verdana, Arial" FontSize="10" />
  <ActionInfo Type="Update" Field="SerDateToRoute" UpdateAction="delete" />
  <Field Display="A reminder from the library. The latest issue of the following
periodical is now available:&lt;br/&gt;&lt;br/&gt;">%%Label</Field>
  <Field Name="SerTitle" Style="font-weight:bold" Footer=". " />
  <Field Name="SerDateToRoute" Header="Date of Issue: " Footer=". " />
  <Field Name="SerID" Visible="false" />
  <Field Name="SerRouteList" Visible="false" />
  <Field Name="ToCFileName.SerToCID" visible="false" />
  <Field Display="&lt;br/&gt;&lt;br/&gt;If you would like to be removed from the
routing list for this title, please contact the library." >%%Label</Field>
  <Field
Display="&lt;br/&gt;&lt;br/&gt;Respectfully,&lt;br/&gt; [LibraryName]">%%Label</Field>
  <Field Display="&lt;br/&gt;[Address]&lt;br/&gt; [Telephone]">%%Label</Field>
</inmg:Report>
```

E-mail content:

A reminder from the library. The latest issue of the following periodical is now available:

Computers in Libraries. Date of Issue: 18 Jan 2009 (expected), 10 Feb 2009 (recd): v. 4, no. 2.

If you would like to be removed from the routing list for this title, please contact the library.

Respectfully,
Information Center

Note the ActionInfo element in the report definition above. This element specifies that the SerDateToRoute field be cleared in each record for which e-mail is sent.

Also note the FontName and FontSize attributes on the EmailInfo element. These provide some control over the formatting of the e-mail content. CssClass attributes cannot be used because the Genie CSS files are not available for use in e-mail.

Serials Claiming: Batch E-mails

Reports similar to the ones supporting batch e-mail routing notices have been created to support batch e-mail claiming notices sent to the supplier. Copy the following reports to MyReports.CONFIG from the new Reports.CONFIG:

- SerialsClaim (new checkbox report replacing the old SerialsClaim; be sure to remove, rename, or comment out the old version)
- EmailSerialsClaim

The action performed after these e-mails are sent inserts the current date followed by ": sent e-mail" in the SerClaimHistory field.

To be able to omit periodicals that have recently been claimed from the search for overdue issues, change the SerClaimHistory field in the textbase to be a Date field (using TextWorks), and add the SerClaimHistory field to the Serials query screen:

```
<inmg:QueryScreen Name="serials_search" Title="Serial Search"
  BrowseButtonText=" Browse "
  BooleanAnd="AND" BooleanOr="OR" BooleanNot="NOT">
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="true" ShowBoolean="true"
    FieldList="SerClaimHistory" ShowCalendar="true"/>
  <QueryField Type="ButtonRow" SubmitButtonText=" Submit Query "
    ResetButtonText=" Reset " CssClass="submit_button"/>
</inmg:QueryScreen>
```

Serials Subscription Renewal

A new report, query screen, and item on the Orders menu have been added to Genie to simplify the process of renewing periodical subscriptions.

Add this report to support copying existing subscription orders with updated content, and remember to add it to the Orders report list as well:

```
<!-- OrdersRenewalReport -->
<inmg:Report Name="OrdersRenew" ShowItemNumber="false" PageSize="0"
  RenewSelectedItems="true" GroupBy="SuppName.OrdSuppID" SelectAll="true"
  ClearAll="true" SortMethod="specify" SortBy="SuppName.OrdSuppID|OrdCatTitle">
  <Field Name="SuppName.OrdSuppID" Style="font-weight:bold" GroupHeader="true"
    NoContentHeader="[supplier missing]" />
  <Field Display="&lt;br/&gt;&lt;br/&gt;" GroupHeader="true" >%%Label</Field>
  <Field width="620" CellSpacing="0" CellPadding="0">%%StartTable</Field>
  <Field Align="Left" width="25" VAlign="Top">%%StartColumn</Field>
  <Field>%%CheckBox</Field>
  <Field>%%EndColumn</Field>
  <Field Align="Left" VAlign="Top">%%StartColumn</Field>
  <Field Name="OrdCatTitle"/>
  <Field Name="OrdID" Visible="false"/>
  <Field Name="OrdDateOrdered" Header="", &lt;i&gt;Last ordered:&lt;/i&gt; " />
  <Field Name="OrdSerDateRenew" Header="", &lt;i&gt;Renew on:&lt;/i&gt; " />
  <Field>%%EndColumn</Field>
  <Field>%%EndTable</Field>
  <Field Display="&lt;br/&gt;" GroupFooter="true">%%Label</Field>
</inmg:Report>
```

The report permits selection of the serial subscriptions to renew:

Inmagic Genie: Orders

Order Search [Search Results](#)

2 records found.

Renew/Reorder

[Reorder selected items](#) | [Select all](#) | [Clear all](#)

Blackwell's Book Services

Information outlook, *Last ordered:* 23 Feb 2008, *Renew on:* 1 Feb 2009

Ebsco Publishing

EContent : the magazine of electronic research and resources (formerly Database), *Last ordered:* 23 Feb 2008, *Renew on:* 1 Mar 2009

[Reorder selected items](#) | [Select all](#) | [Clear all](#)

The new Order records will be copies of the original records with these changes:

- The Order Number field has a ".1" appended (to keep the order items together)
- The Purchase Order, Date Received, Date Sent to Requestor, and Invoice Number fields are cleared
- The Start Date, Expiration Date, Renewal Date, and Date Due fields are increased by one year
- Date Ordered is set to the current date
- Order Status is set to "new"

Add this query screen to MyQueries.CONFIG to support finding subscriptions pending renewal:

```
<img:QueryScreen Name="orders_renew" Title="Renew/Reorder Search"
  BrowseButtonText=" Browse " BooleanAnd="AND" BooleanOr="OR" BooleanNot="NOT">
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="false" ShowBoolean="true"
    FieldList="OrdDateOrdered" ShowCalendar="true"/>
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="true" ShowBoolean="true"
    FieldList="OrdSerDateRenew" ShowCalendar="true"/>
  <QueryField Type="QueryField" Display="Supplier"
    CssClass="SearchTextInput" LabelCssClass="SearchLabel" ShowBrowse="true"
    ShowBoolean="true" FieldList="SuppName.OrdSuppID"/>
  <QueryField Type="QueryField" CssClass="SearchTextInput"
    LabelCssClass="SearchLabel" ShowBrowse="true" ShowBoolean="true"
    FieldList="OrdCattTitle"/>
  <QueryField Type="ButtonRow" SubmitButtonText=" Submit Query "
    ResetButtonText=" Reset " CssClass="submit_button"/>
</img:QueryScreen>
```

And add this menu item to MyNavBarMenuData.CONFIG:

```
<Item Id="Order" Text="Orders" itemtype="Menu" . . . >
  <Item Id="Orders_Search" . . .></Item>
  <Item Id="Order_Serial . . .></Item>
  . . .
  <Item Id="Order_Renew" Look-LeftIconUrl="order-serials.gif" Text="Renew/Reorder"
    NavigateURL="orders_search.aspx?Type=renew"
    permission="Administrators Catalogers"></Item>
</Item>
```

Result:

The screenshot displays the Inmagic Genie web application. On the left, a vertical navigation menu lists various library functions, with 'Orders' highlighted. The main window is titled 'Inmagic Genie: Orders' and contains a search interface for 'Renew/Reorder Search'. This interface includes four search criteria: 'Date Ordered', 'Renewal Date', 'Supplier', and 'Title'. Each criterion has a dropdown menu currently set to 'AND', a text input field, and a 'Browse' button. Below these fields are 'Submit Query' and 'Reset' buttons. To the right of the search area is a 'Search Tips' box, which provides guidance on using search operators like '&' for AND, '/' for OR, '!' for NOT, '*' for truncation, and ':' for ranges. It also includes a link to a 'Help' page for more details.

Other Changes in Genie 3.30

The major new features of Genie 3.3 are described above, together with detailed information about adding them to your existing My* CONFIG files. Additional changes are listed in the Upgrade section of the Inmagic Genie Install Notes. For example, checkbox forms and associated e-mail reports have been implemented for textbases other than Serials. Refer to the Install Notes for information about additional changes.

About *Genie* Documentation

For a list of the documentation available for the *Genie* application, see its README file. You received electronic copies of the *Genie* documentation set when you installed the application. You will find them in the Documentation subfolder of the *Genie* installation folder. In addition, you can access the documentation set through the Inmagic Customer Extranet at <http://support.inmagic.com/downloads/extranet.html>.

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