

# Inmagic® Genie 3.30 Installation Notes

Thank you for purchasing Inmagic® Genie.

Inmagic Genie is an integrated library system application that consists of a set of predefined textbases, forms, and business logic to support library functions such as cataloging, acquisitions, circulation of materials, serials tracking, interlibrary lending, and end user searching.

## Sample system configuration

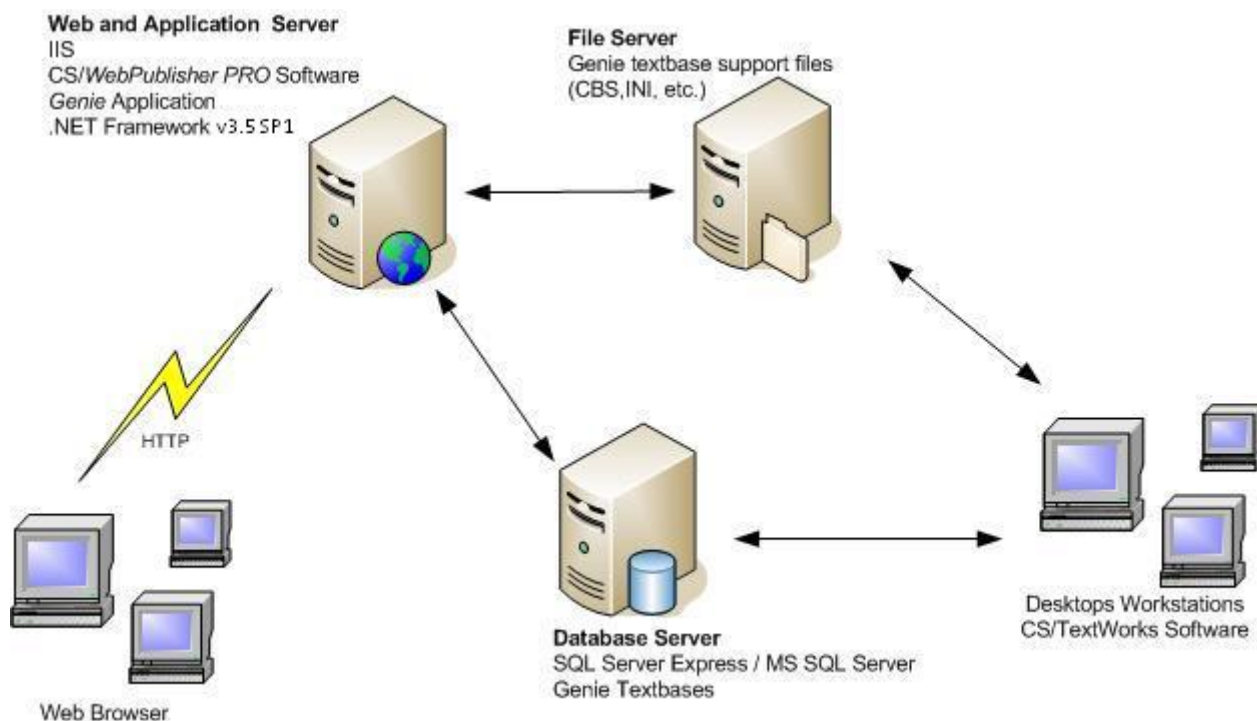


Figure 1: Sample system configuration

## System Requirements

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In addition to the system requirements necessary for the *Content Server* product (refer to the Technical Guidelines documentation, which you can find at the Inmagic Web site at <http://www.inmagic.com>), the *Genie* application has the following system requirements. Note that these requirements are accurate as of the original publication date for this document. For the most up-to-date system requirements, go to the Inmagic Web site.

### Server Requirements

- **Operating systems.** One of the following operating systems:
  - Windows 2003 with Service Pack 2
  - Windows XP PRO with Service Pack 2
- **Content Server version 9.00, Service Pack 1 or later [Content Server v11.00 Recommended].** *Content Server* version 9.00, SP1 or later must already be installed and functioning properly before you install the *Genie* application.
- **ISAPI.** The *Genie* application only supports ISAPI.
- **Microsoft Internet Information Services (IIS) version 5.0 or later.** This Web server software must already be installed.
- **Microsoft .NET Framework Version 3.5 Service Pack 1.** This software must already be installed before you try to install the *Genie* application. Note that the installation program will not continue if it does not detect .NET Framework version 3.5 Service Pack 1.
- **Microsoft Internet Explorer version 6.0 or later.** This software is required on the server to support the XML-dependent functionality of the *Genie* application. Internet Explorer must be installed on the Web server machine before you try to install the *Genie* application. Note that the installation program will not continue if it does not detect Internet Explorer 6.0 or later.

### Client Requirements

- **Operating systems.** One of the following operating systems:
  - Windows Vista
  - Windows 2003 with Service Pack 2
  - Windows XP Professional with Service Pack 2
  - Windows 2000 Professional with Service Pack 4
- **Screen resolution.** We recommend a minimum screen resolution of 1024 x 768 pixels on the Web browser machines that will access the application. You can specify this setting through the Windows Display Properties dialog box. A smaller screen resolution can be used, but more scrolling will be required in order to see the information on some screens.
- **Web Browser Support**
  - **Microsoft Internet Explorer version 6.0 or later.**
  - **Firefox.** Firefox is supported for the OPAC, for searching and viewing results.
  - Cookies must be enabled regardless of browser used.

## Before You Begin

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### Do the following before you begin

- **Verify that CS/WebPublisher PRO can search a textbase and edit a record before you install the Genie application.** If the CARS textbase was installed with CS/WebPublisher PRO, you can do the following:
  1. Point your Web browser to <http://webservername/ics-wpd/sample/carsqs.htm>. Fill in the name of the Web server where CS/WebPublisher PRO resides.
  2. Type an asterisk (\*) in the **Model Type: Assembled or Kit?** box, then click the **Submit Query** button. A successful search will display the search results.
  3. From the drop-down list, select **Prices (edit links)**.
  4. Select the **Edit Record** link for any record.
  5. Modify any field.
  6. Click the **Submit Record** button. A successful record save message should appear.CS/WebPublisher PRO must successfully do the above before you try to install the Genie application.
- **Exit all Windows applications.** Exit all Windows applications before installing the Genie application.
- **Administrator access.** Log in as Local Administrator or a domain user with local administrator privileges before you start the installation process. If you are not logged in as an Administrator, Setup detects it and a dialog box opens so that you can switch accounts (to an Administrator). The installation cannot continue if you are not logged in as an Administrator or you do not have Administrator privileges on the local machine.
- **Remote Access / Desktop.** It is strongly recommended that you do not use remote access / desktop to install this product.

### Know the answers to or be aware of the following items before you begin

- **Validation override preference for Browse lists.** You need to know your organization's validation override preference for the Genie application because you set this during the installation process. Consult with your library administrator.
- **Sample textbases.** You need to know if you have to install the Genie sample textbases. The library staff may want to use the sample textbases to help familiarize themselves with the application. Consult with your library administrator.
- **Serial number.** Have your Genie serial number available. You will be asked for it during the installation process.
- **Content Server configuration and authentication method.** You should know which configuration of Content Server you have (for example, Standard or Workgroup) and which SQL Server authentication method it uses (Windows Authentication or SQL Authentication). Depending on this information, you may have to specify/modify certain settings before you can use the Genie application. This document details which settings must be set for each situation.

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**Note:** By default, Content Server Standard uses Windows Authentication. Content Server Workgroup uses SQL Authentication.

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- **MARC Transformer for Inmagic® Content Server bundled with the Genie product.** If your library receives cataloging data in MARC communications format, you may want to install the MARC Transformer. The transformer product comes with its own installation CD-ROM and installation instructions if you receive the Genie product on CD. If you receive the Genie product via download, you must call Inmagic Customer Service and request the CD for the MARC Transformer product. The transformer helps you load MARC data into your Genie textbases. The transformer also helps you provide your textbase data to others in MARC communications format.

## Installation Steps

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The following are the steps to installing *Genie* version 3.30.

1. Installation of the Inmagic *Genie* version 3.30 software
  - An installation folder is created for the *Genie* program files; plus a subfolder for the *Genie* textbase files, as well as other subfolders required by the application.
  - The virtual directory required by the *Genie* application is created and configured.
  - You are prompted to select the IIS authentication method for the *Genie* application.
  - SOAP files necessary for *Genie* are copied to the Soap subfolder of the installation folder for *CS/WebPublisher PRO*
2. Setting up security

You must assign rights and security for SQL Server, Windows folders, and the textbases.
3. Testing and wrapping up

## Step 1 - Installing Inmagic Genie 3.30

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### To install Inmagic Genie

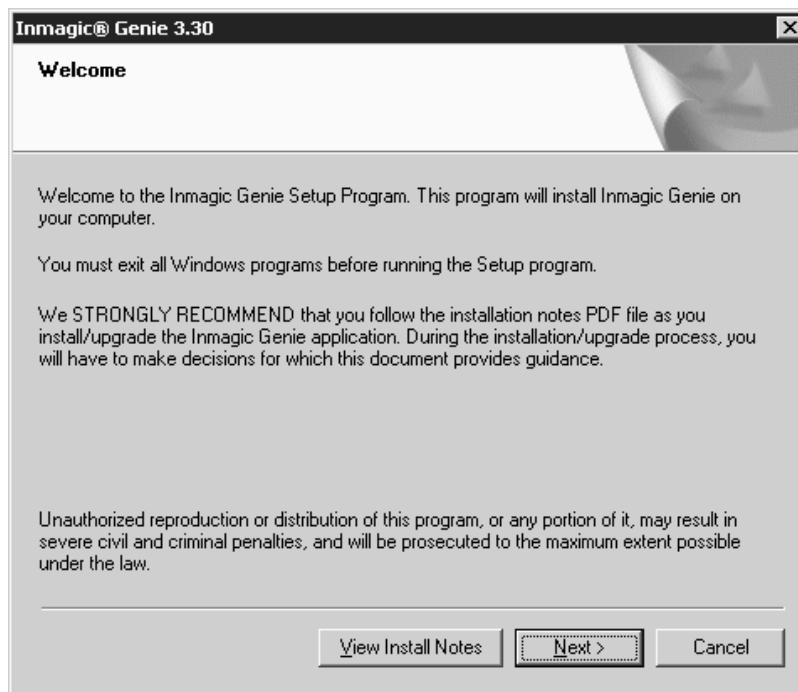
1. On the Web server where you have CS/*WebPublisher PRO* installed, log in with Administrator privileges (for example, Local Administrator or a domain user with local administrator privileges). It is strongly recommended that you do not use remote access / desktop to install this product.
2. Because the application is a Web-based application, stop IIS (the World Wide Web Publishing Service). For example, you can do this by using the Services option through the Windows Computer Management window. Stopping IIS ensures that installation and configuration of the application are not interrupted.
3. Depending on your situation, do the following:
  - If you are installing from the Inmagic *Genie* Setup CD-ROM, insert it in the drive of the Web server machine where you have CS/*WebPublisher PRO* installed. Setup should automatically start. If it does not, open Windows Explorer and from the installation CD-ROM, double-click **Setup.EXE**.
  - If you are installing from an electronic download, after you download the *Genie* ZIP file, unzip it to a temporary folder on the Web server machine where you have CS/*WebPublisher PRO* installed. Then, from within that folder, double-click **Setup.EXE** to launch the program to install the *Genie* application.

Note that the Setup program will not proceed if any one of these is true:

- Microsoft .NET Framework Version 3.5 Service Pack 1 is not already installed.
- Microsoft Internet Explorer 6.0 or later is not already installed.

#### 4. Welcome

On the Welcome dialog box, click **Next**.



**Figure 2: Welcome dialog box**

## 5. License Agreement

On the License Agreement dialog box, read the license agreement, and then respond appropriately.

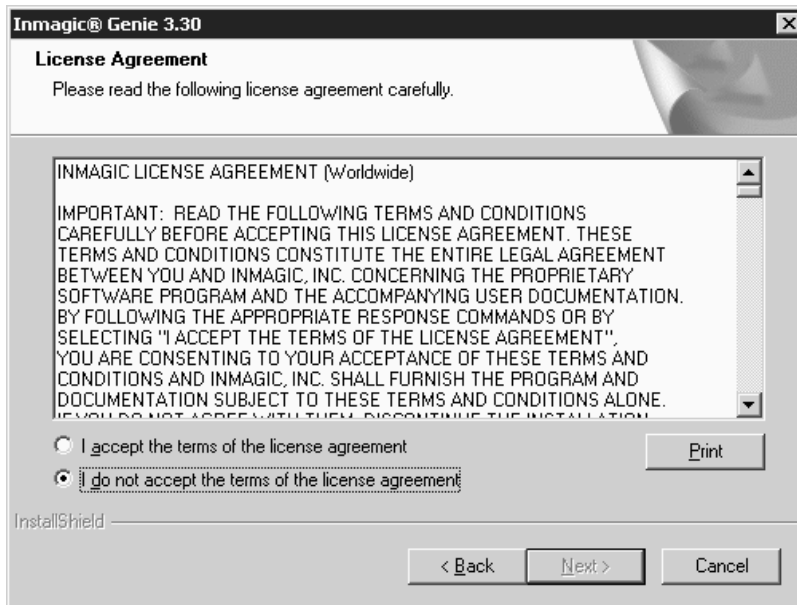


Figure 3: License Agreement dialog box

## 6. Customer Information

On the Customer Information dialog box, enter your name and your company name, and the *Genie* serial number, then click **Next**.

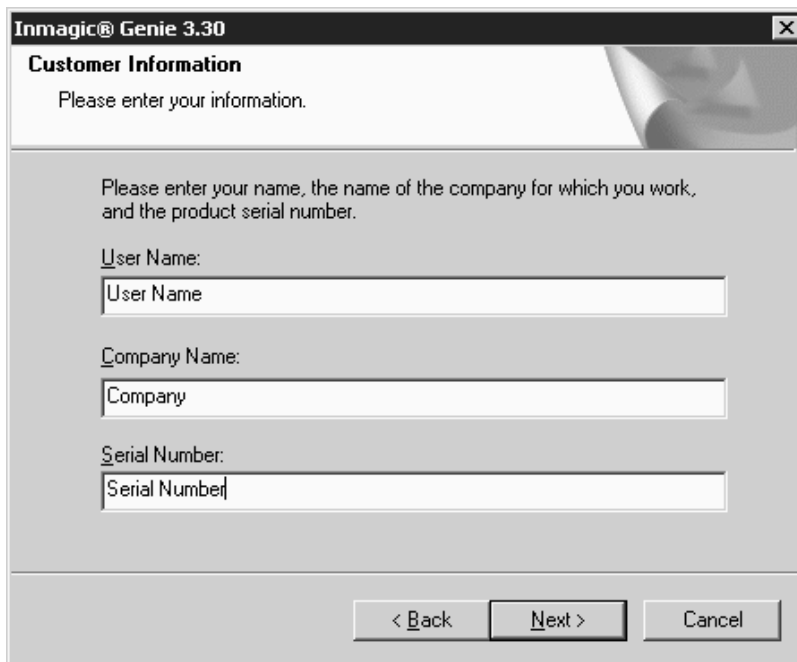
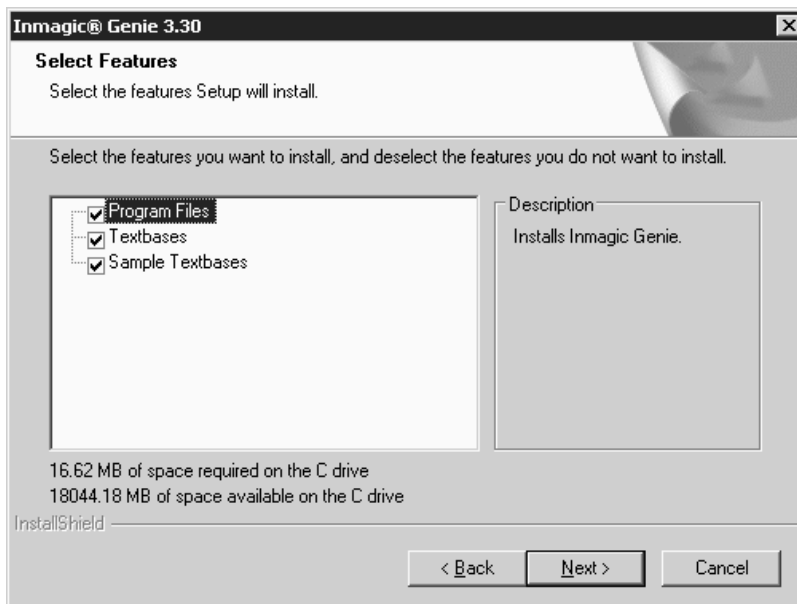


Figure 4: Customer Information dialog box

## 7. Select Features

On the Select Features dialog box, select or clear the check boxes, as appropriate, then click **Next**.

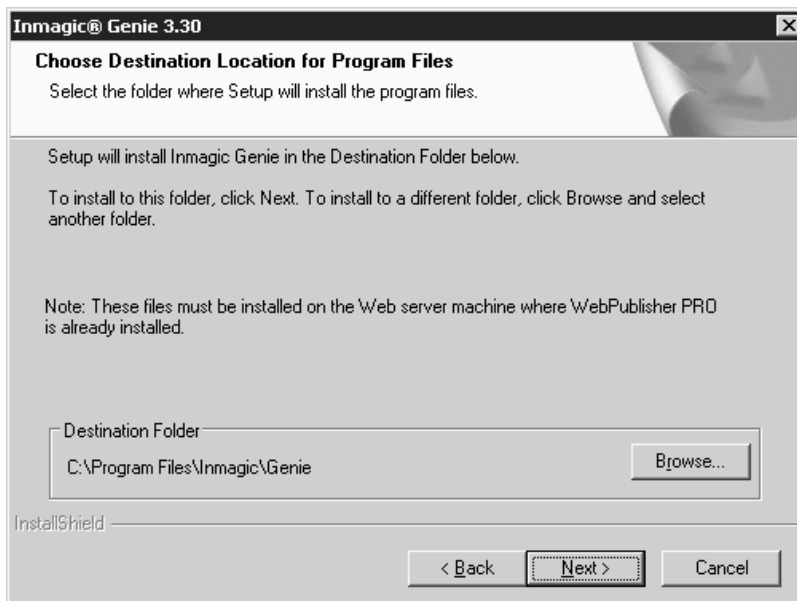
- **Program Files.** Installs the *Genie* program files.
- **Textbases.** Provides the files needed to install the **empty** textbase files ready to accept your data. You will have to install the textbases on the SQL Server before you can use them.
- **Sample Textbases.** Provides the files needed to install the sample textbases supplied with the application. If selected, you will also have to install the textbases on the SQL Server before you can use them.



**Figure 5: Select Features dialog box**

## 8. Choose Destination Location for Program Files

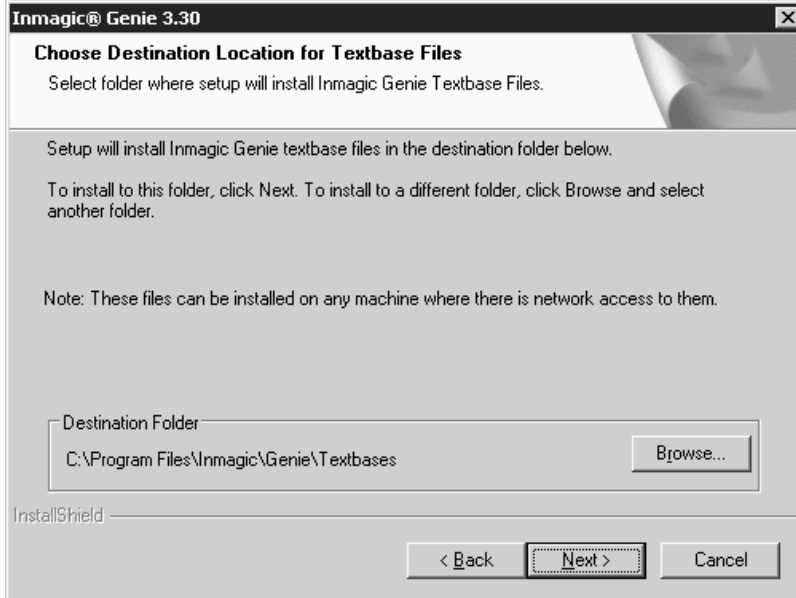
On the Choose Destination Location for Program Files dialog box, accept the default location (C:\Program Files\Inmagic\Genie) or click the **Browse** button to change it. This is where program files for the *Genie* application will be installed. These files must be installed on the Web server machine where you have *CS/WebPublisher PRO* already installed.



**Figure 6: Choose Destination Location for Program Files dialog box**

## 9. Choose Destination Location for Textbase Files

On the Choose Destination Location for Textbase Files dialog box, accept the default location (C:\Program Files\Inmagic\Genie\Textbases) or click the **Browse** button to change it. This is where Setup will install the *Genie* textbase files. Note that Setup will edit the *CS/WebPublisher PRO* ICSWeb.INI file to point *CS/WebPublisher PRO* to this location for the *Genie* textbases.

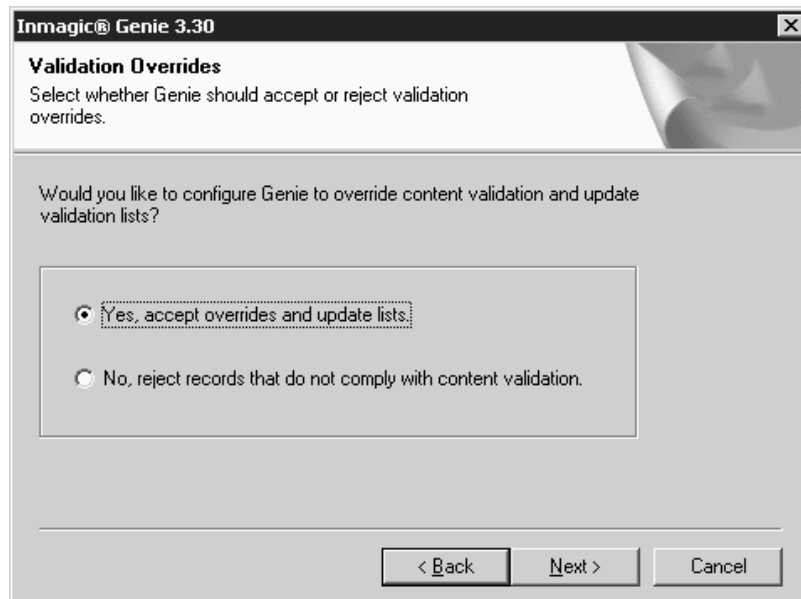


**Figure 7: Choose Destination Location for Textbase Files**

## 10. Validation Overrides

On the Validation Overrides dialog box, specify whether the *Genie* application should accept or reject validation overrides, then click **Next**.

- **Yes, accept overrides and update lists.** Select this option button to instruct the *Genie* application to accept overrides and update the corresponding validation list. This is the recommended choice.
- **No, reject records that do not comply with content validation.** Select this option button to instruct the *Genie* application to not permit overrides.

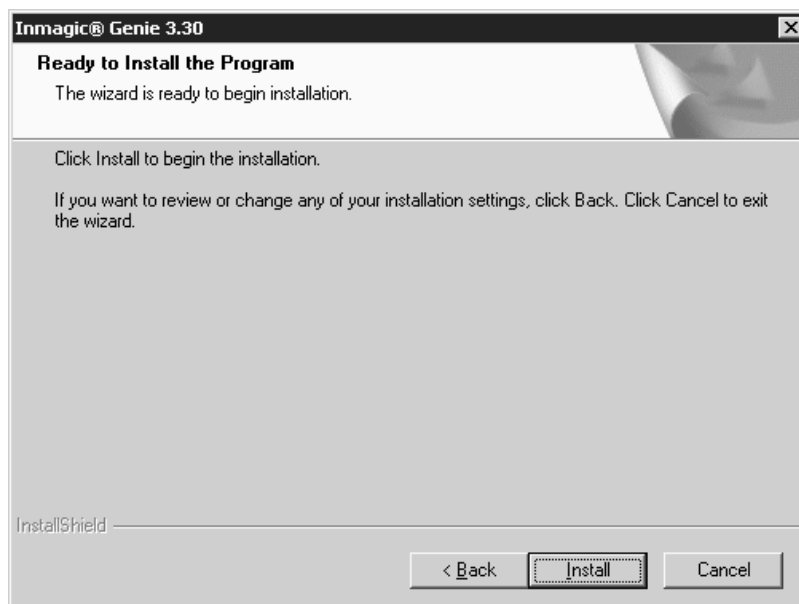


**Figure 8: Validation Overrides dialog box**

If you later decide that you want to switch validation methods, see Inmagic Knowledgebase Article 2728.

## 11. Ready to Install the Program

On the Ready to Install the Program dialog box, click the **Install** button to start the installation. Wait while Setup installs the files.



**Figure 9: Ready to Install the Program dialog box**

## 12. Virtual Directory Set-up

On the Specify Virtual Directory Settings dialog box, specify the settings you want to use with your InmagicGenie virtual directory, then click **Next**.

- **Available Web Servers.** Specify the Web site on which you want to create the virtual directory for the *Genie* application, which will be called InmagicGenie. This should be the same Web site on which the ICS-WPD virtual directory was created for *CS/WebPublisher PRO*. Note that if ICS-WPD is not there, Setup will create it.
- **IIS Authentication.** Select the authentication method you want to use with the *Genie* application. For example, you can select Anonymous Access with or without SSL or you can use Integrated Windows Authentication [Single Sign-on] to bypass the user login screen.

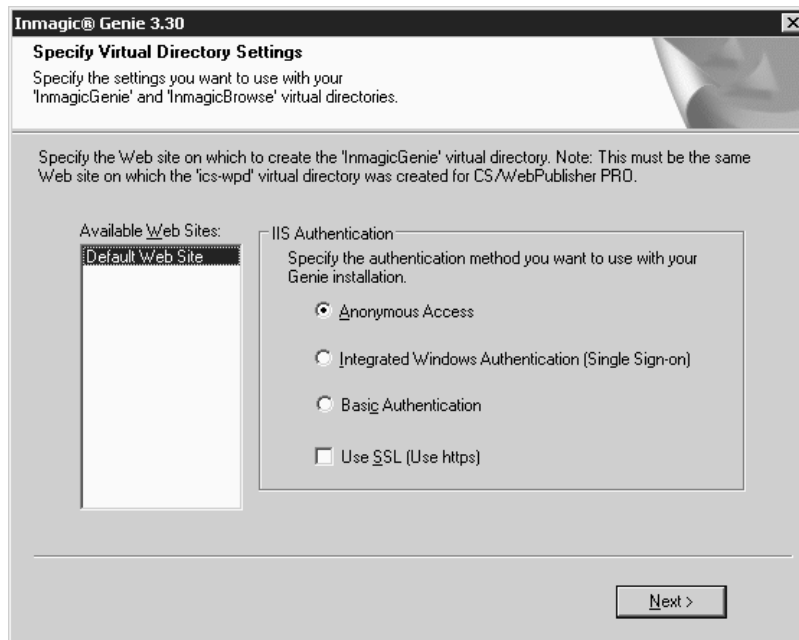


Figure 10: Specify Virtual Directory Settings dialog box

**Important!** Do not select **Integrated Windows Authentication (Single Sign-on)** unless both of the following are true:

- The ICS-WPD virtual directory for *CS/WebPublisher PRO* has Anonymous Authentication selected.
- The INMCSR.V.INI file in the *CS/WebPublisher PRO* installation folder has WindowsAuthentication=1

## 13. Informational Messages

A message appears to provide information regarding the Web.Config file.



Figure 12: Web.CONFIG information message

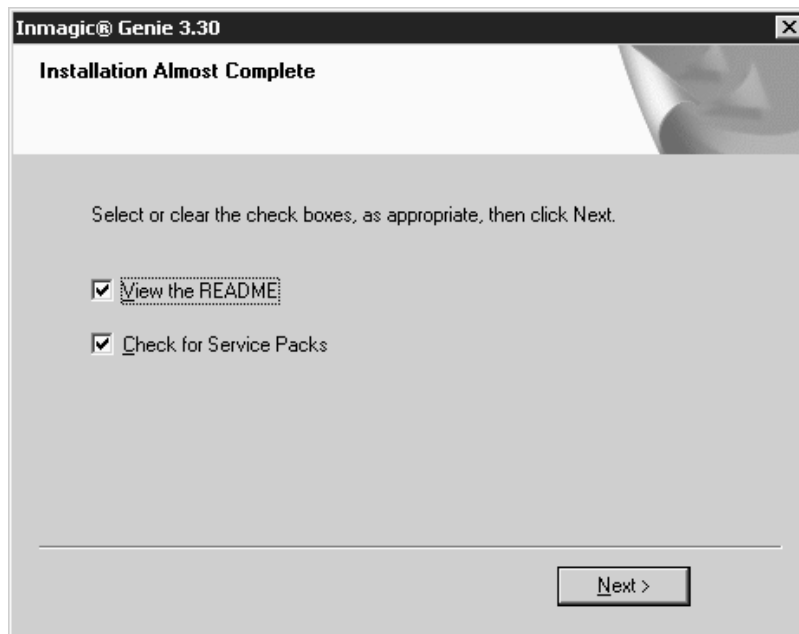
#### 14. ICSWeb.INI File Edit

During the installation, Setup edits the ICSWeb.INI file. *CS/WebPublisher PRO* uses the information in this file to locate the *Genie* textbases (the textbase path you chose in step 9 on page 8). For example, if you accepted the default location, Setup updates the .INI file to point to C:\Program Files\Inmagic\Genie\Textbases.

Note that if Setup determines that textbases with these names already are listed in the ICSWeb.INI file, Setup will not write those *Genie* textbase names to this file. If this is the case, a message box will appear with the duplicate textbase names listed. If this is a new *Genie* installation, rather than an upgrade from an earlier version, note these textbase names. You will have to manually modify the .INI file to indicate the path to the textbases that the *Genie* application will be using. All the *Genie* textbases must be listed in the ICSWeb.INI file for the application to be able to function properly. Click **OK** to dismiss the message box.

#### 15. Installation Almost Complete

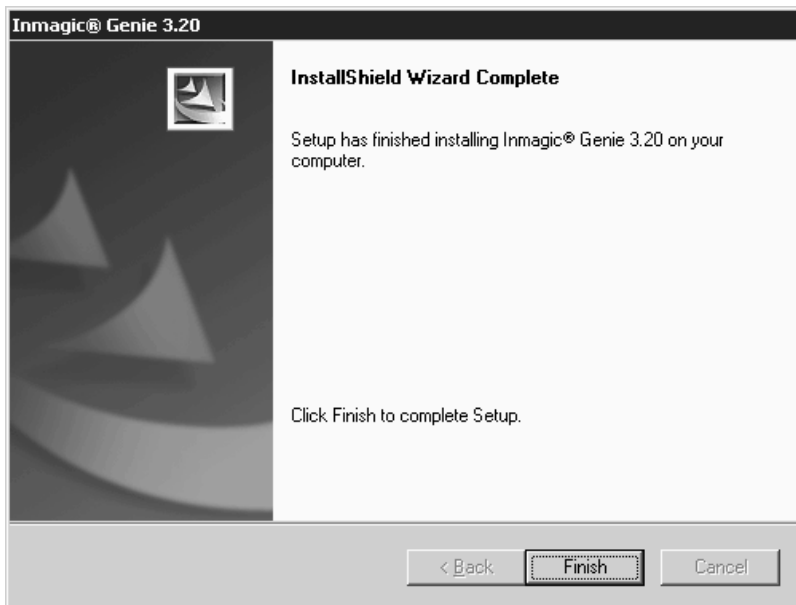
On the Installation Almost Complete dialog box, select or clear the checkboxes for **View the README** and **Check for Service Packs**, as appropriate, then click **Next**.



**Figure 13: Installation Almost Complete dialog box**

If you selected the **View the README** check box, read or print the file, then close it to continue with the installation.

If you selected **Check for Service Packs**, your Web browser will open to the Inmagic Customer Extranet Service Pack page. We recommend that you check for the latest service pack. Click **Finish**.



**Figure 14: InstallShield Wizard Complete dialog box**

16. In step 2, you stopped IIS. IIS (including the World Wide Web Publishing Service) will be restarted when the installation is completed.

**Note:** If needed, a different InstallShield Wizard Complete dialog box will appear, recommending that you restart your computer when you click the **Finish** button. If you see this dialog, you must reboot your computer before using the application.

## 17. Installing *Genie* Textbases on your SQL Server

**Note:** This section is for new *Genie* installations only. Skip to **Step 3 – Testing and Wrapping Up** if this is an upgrade.

Before you can use any of the *Genie* textbases, you must install them on your SQL Server. During the installation process, one or more backup file sets for the *Genie* textbases were copied into subfolders under your *Genie* installation folder.

Note that these instructions assume you accepted the default locations when you installed the application.

- **Textbase\_Backup\_File\_Set.** The files in this subfolder contain no records (except in the GENIEKEY and SUPPLIER textbases) so that you can load your own records into them. The default path is C:\Program Files\Inmagic\Genie\Textbases\Textbase\_Backup\_File\_Set. The files in this subfolder must be restored to the Textbases subfolder (default is C:\Program Files\Inmagic\Genie\Textbases).

**Note for *Genie* Express installations:** Only restore the CATALOG and GENIEKEY textbases. No other textbase is required for *Genie* Express.

- **Sample\_Backup\_File\_Set.** The files in this subfolder are the same as in the Textbase\_Backup\_File\_Set subfolder mentioned above—except that they are populated with sample data so that you can use them to familiarize yourself with the application. The default path is C:\Program Files\Inmagic\Genie\Textbases\Sample\Sample\_Backup\_File\_Set. The files in this subfolder must be restored to the Sample subfolder (default is C:\Program Files\Inmagic\Genie\Textbases\Sample). This subfolder was created during the installation process when you selected the **Sample Textbases** check box in step 8.

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**Tip!** If your SQL Server data is located on a machine **other than** the one on which CS/TextWorks is installed, you can either make the Textbase\_Backup\_File\_Set and Sample\_Backup\_File\_Set subfolders shared before installing the respective textbases, or you can access these files from the Textbases folder located on the top level of the installation CD-ROM/download.

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- a. Log in with Administrator privileges (for example, Local Administrator) and start the Content Server Administration program (InmCSAdmin.EXE) on the Web server machine where CS/*WebPublisher PRO* is installed.  
  
InmCSAdmin.EXE is located in its Exec subfolder (for example, C:\Program Files\Inmagic\CSWEB\Exec).
- b. If the User File Path dialog box opens (only appears the very first time you run the software on that machine), specify where you want to create user files and temporary files, then click **OK**. You can accept the suggested path or specify a different one. You need full rights to whichever folder you specify.
- c. Choose **Back Up & Restore>Restore Textbases** to open the Restore Textbase Options dialog box.
- d. In the **Backup set** box, use the **Browse** button to enter the path to a backup file set from either the Textbase\_Backup\_File\_Set subfolder or the Sample\_Backup\_File\_Set subfolder.

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**Important!** If your SQL Server instance is located on a machine other than the one on which *Content Server* is installed, you must also do the following:

- Use the Universal Naming Convention (UNC) file path to the backup file set using the format \\Server\Share\Backups (for example, \\<server name>\VOL1\Textbases\Textbase\_Backup\_File\_Set\Borrower.CBA).
  - Use specific login parameters for the SQL Server service. The account must be a domain user on the domain server (but does not need to be a member of any domain Admin group). This account should be a part of the local Admin group on the SQL Server machine. (To do this, right-click the **My Computer** icon on your desktop and select **Manage**. Expand the Services and Applications tree, then double-click **Services**. Right-click your instance of SQL Server for the *Genie* application, and select **Properties**. Select the Log On tab and then specify the account.)
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- i. Click the **Browse** button and navigate to the applicable Backup\_File\_Set subfolder (for example, C:\Program Files\Inmagic\Genie\Textbases\Textbase\_Backup\_File\_Set **or** C:\Program Files\Inmagic\Genie\Textbases\Sample\Sample\_Backup\_File\_Set).
- ii. Select one or more textbases (for example, **Borrower.CBA**), then click **Open**.

You can select more than one textbase at this point. We recommend that you select all of them.

- e. In the **Restore path** box, click the **Browse** button and navigate to the appropriate folder:
  - If you are restoring from the Textbase\_Backup\_File\_Set subfolder, restore to the Textbases subfolder of the *Genie* installation folder (for example, C:\Program Files\Inmagic\Genie\Textbases).
  - If you are restoring from the Sample\_Backup\_File\_Set subfolder, restore to the Sample subfolder (for example, C:\Program Files\Inmagic\Genie\Textbases\Sample). Be sure you restore the sample textbases into the Sample subfolder. If you restored the textbases in Textbase\_Backup\_File\_Set into the Textbases subfolder first, you must change the path in the **Restore path** box to the Sample subfolder.

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**Important!** If you decide to use the sample textbases, you must manually change the ICSWeb.INI file to point to them in the Sample subfolder. You cannot point to the real and sample textbases in the ICSWeb.INI file at the same time; only one set of *Genie* textbases can be specified in the INI file.

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- f. After all the textbases have been restored, proceed to **Step 2- Setting Up Security**.

## Step 2 - Setting Up Security

If either of the following applies, security must be set up before anyone can access the *Genie* application.

- You selected Integrated Windows Authentication or Basic Authentication when setting up the InmagicGenie virtual directory (step 12). See **Setting Windows Permissions on Folders**.
- *Content Server* is using Windows Authentication when accessing SQL Server. See **Assigning User Rights to Textbases**.

### Setting Windows Permissions on Folders

If you selected Anonymous Authentication when setting up the InmagicGenie virtual directory (step 12), the *Genie* install will assign the necessary Windows rights to the folders. Proceed to either **Assigning User Rights to Textbases** (if *Content Server* uses Windows Authentication when accessing SQL Server) or **Step 3 – Testing and Wrapping Up** (if *Content Server* uses SQL Authentication).

If you selected Basic Authentication or Integrated Windows Authentication, you must set Windows permissions for Genie users on the folders as described in this section.

#### Set Windows permissions for *Genie* users on the Textbases subfolder

You must set specific Windows permissions on the Textbases subfolder (or wherever you installed the *Genie* textbases) to allow users to search and/or modify your textbases. Do this for the folder where you installed the Sample textbases also, if necessary.

Note that the instructions and illustrations in this section are for a Windows 2003 machine.

- a. Right-click the Textbases subfolder (for example: C:\Program Files\Inmagic\Genie\Textbases), or wherever you installed the *Genie* textbases, and click **Properties** from the shortcut menu to open the corresponding Properties dialog box.
- b. On the Security tab, in the Group or User Names list, select a domain user/group account that will be using the *Genie* application. If the account you want is not there, click the **Add** button and do the following; otherwise continue with step 8.

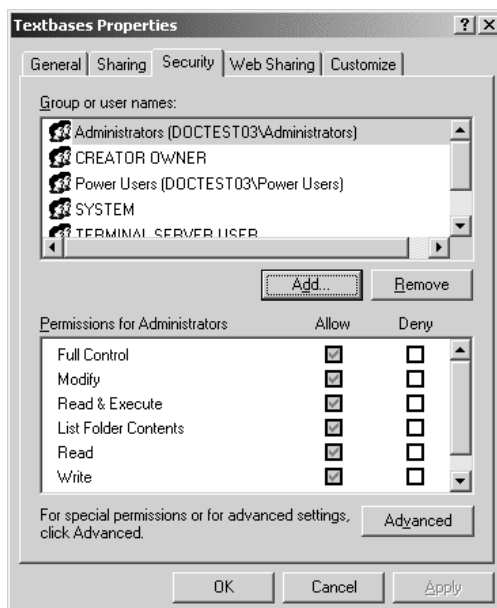
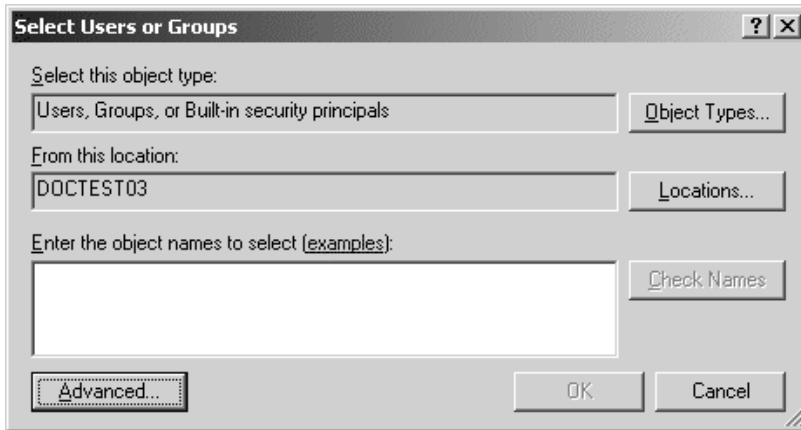


Figure 14: Textbases Properties dialog box

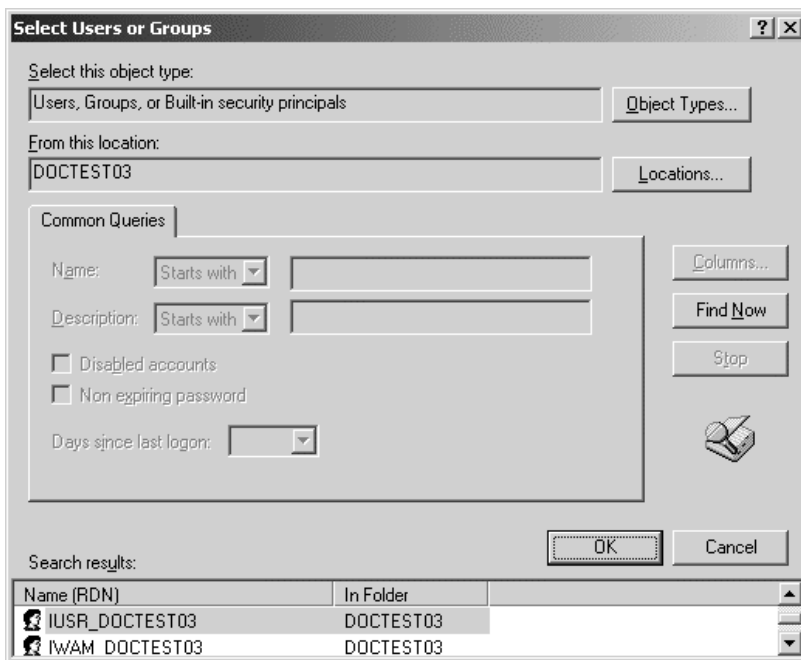
- c. If necessary, click the **Locations** button to open the Locations dialog box and select the Windows domain.

- d. When your Windows domain is showing in the **From this location** box, click the **Advanced** button to open the Select Users or Groups dialog box.



**Figure 15: Select Users or Groups dialog box for Textbases subfolder**

- e. Click the **Find Now** button to display a list of your user/group accounts in the **Search results** box.
- f. Select the user/group account from the list, then click **OK**.



**Figure 16: Select Users or Groups dialog box expanded for Textbases subfolder**

- g. Click **OK** again to return to the Textbases Properties dialog box.
- h. Check the Modify & Write check boxes for the selected or newly-added account.
- i. If Content Server is using Windows Authentication, proceed to Assigning User Rights to Textbases. If Content Server is using SQL Authentication, proceed to **Step 3 – Testing and Wrapping Up**.

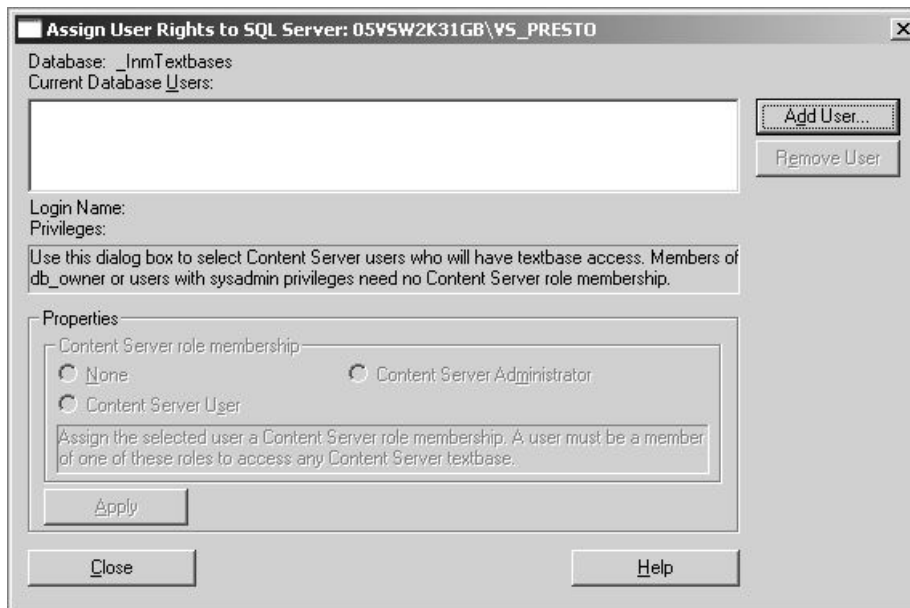
## Assigning User Rights to Textbases

If *Content Server* uses Windows Authentication to access SQL Server, the following need to be set up:

- Assign User Rights to SQL Server
- Assign User Rights to the *Genie* textbases

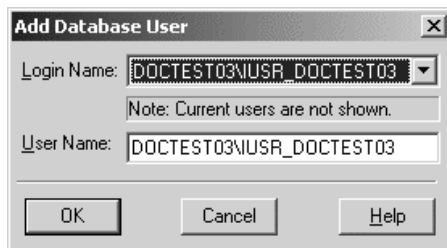
### 1. Assign User Rights to SQL Server

- Start the Content Server Administration program (InmCSAdmin.EXE). If you are on the Web server machine where *CS/WebPublisher PRO* was installed, this file is located in its Exec subfolder (for example, C:\Program Files\Inmagic\ICSWEB\Exec).
- Choose **Configure SQL Server>Manage Security>Assign User Rights to SQL Server**.
- On the Assign User Rights to SQL Server dialog box, click the **Add User** button.



**Figure 21: Assign User rights to SQL Server dialog box**

- On the Add Database User dialog box, depending on your situation, do the following. Note that the Windows user/group must have a login on the SQL Server.
  - For Anonymous Access or Integrated Windows Authentication, select the Anonymous Access user for the ICS-WPD virtual directory from the drop-down list and click **OK**.
  - For Basic Authentication, select the group containing *Genie* users from the drop-down list and click **OK**.



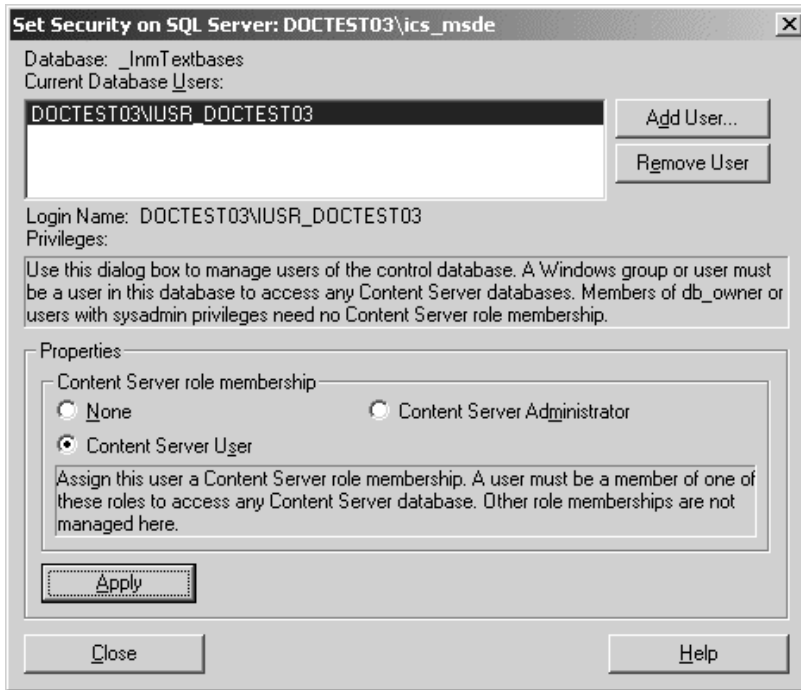
**Figure 22: Add Database User dialog box**

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**Tip!** If your SQL Server is on a different machine than the *Genie* application, you must use a domain account for Anonymous Access, rather than the IUSR account.

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- e. On the Assign User Rights to SQL Server dialog box, assign the Windows user/group selected in the Current Database Users list to the appropriate role membership for the Windows user/group, then click the **Apply** button. If you are assigning individual users, repeat steps c-e.



**Figure 23: Assign User Rights to SQL Server dialog box with example**

- f. Click **Close**.

## 2. Assign user rights to the *Genie* textbases.

You must specify security settings for **all** the *Genie* textbases in the installation folder. You must do this for the empty *Genie* textbases in the folder in which you installed the *Genie* textbases. If you plan to use the textbases in the Sample subfolder, then you would have to do this for those textbases too.

These security settings assign your users/groups (specifically, their domain accounts with logins on the SQL Server) membership to roles granting varying degrees of access to the textbases on the SQL Server.

- a. Start the Content Server Administration program (InmCSAdmin.EXE). If you are on the Web server machine where *CS/WebPublisher PRO* was installed, this file is located in its Exec subfolder (for example, C:\Program Files\Inmagic\ICSWEB\Exec).
- b. Choose **Configure SQL Server>Manage Security>Assign User Rights to Textbase** to open the Select Content Server Textbase dialog box.
- c. Select a *Genie* textbase from the folder in which you installed the *Genie* textbases (for example, C:\Program Files\Inmagic\Genie\Textbases) and click **Open**.
- d. On the Assign User Rights to Textbase dialog box, click the **Add User** button.

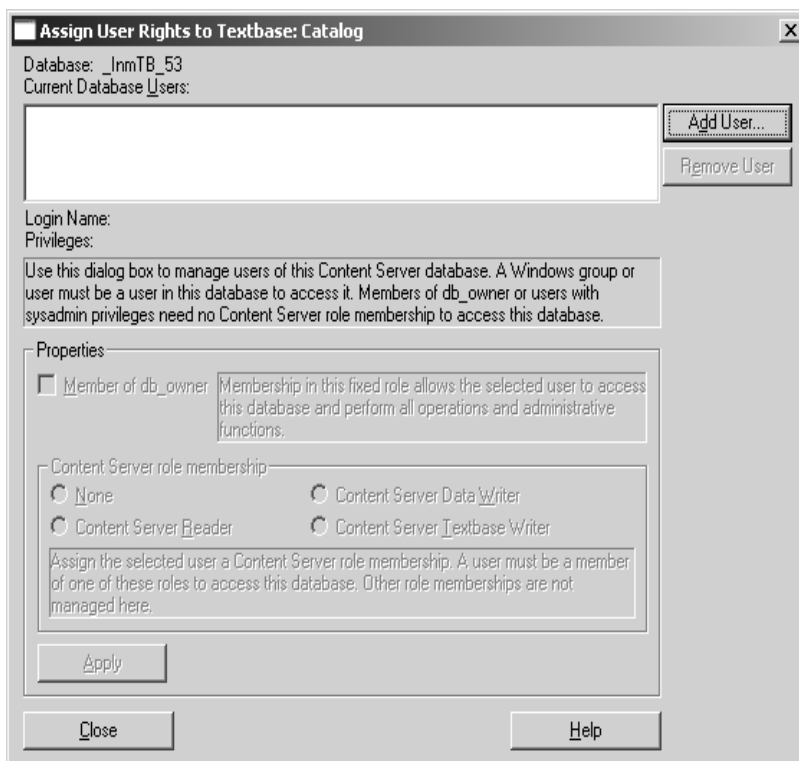
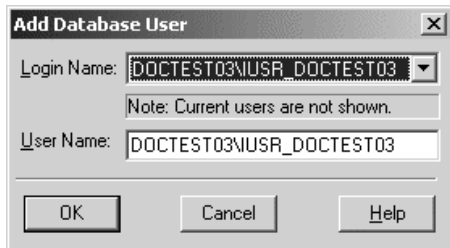


Figure 24: Assign User Rights to Textbase dialog box

- e. On the Add Database User dialog box, select a Windows user/group from the drop-down list (for example, IUSR\_<Machine Name>). The Windows user/group must have a login on the SQL Server.
  - For Anonymous Access or Integrated Windows Authentication, select the Anonymous Access user for the ICS-WPD virtual directory from the drop-down list and click **OK**.
  - For Basic Authentication, select the group containing *Genie* users from the drop-down list and click **OK**.



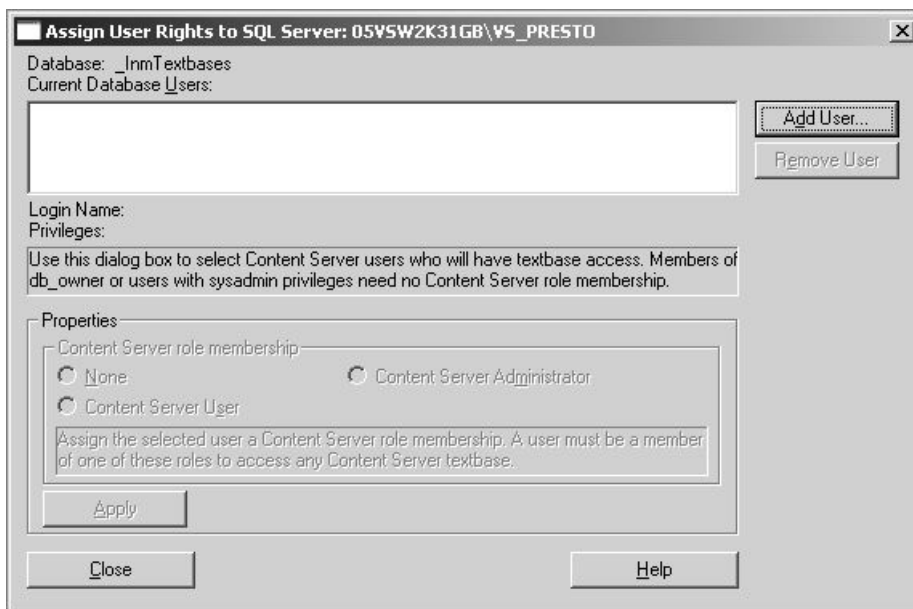
**Figure 25: Add Database User dialog box**

---

**Tip!** If your SQL Server is on a different machine than the *Genie* application, you must use a domain account for Anonymous Access, rather than the IUSR account.

---

- f. On the Assign User Rights to Textbase dialog box, assign the Windows user/group selected in the Current Database Users list to the appropriate role membership for the Windows user/group, then click the **Apply** button.



**Figure 26: Assign User Rights to Textbase dialog box with example**

- g. Repeat steps d–f for each Windows user/group that should have access to the *Genie* textbase selected in step c. When done, click the **Close** button.
- h. Repeat steps c–g for each textbase in the folder in which you installed the *Genie* textbases.
- i. Repeat steps c–g for each textbase in the Sample subfolder, if necessary.
- j. When done, close the Select Inmagic Content Server Textbase dialog box and close the Content Server Administration program.
- k. Proceed to **Step 3 – Testing and Wrapping Up**.

## Step 3 - Testing and Wrapping Up

---

This section shows you how to make sure your *Genie* application is accessible. In addition, it tells you how to change the default content page. It also suggests how to wrap up the installation.

### To test access to the *Genie* application

After you have completed the installation of the *Genie* application, perform the following test to make sure the application is accessible. If any of these steps fails, then there may be a problem with the installation. If an error message appears anywhere during this test, check the Inmagic Knowledgebase. You can access the Knowledgebase through the Inmagic Customer Extranet at <http://support.inmagic.com/downloads/extranet.html>. Make a note of the exact text of the message or print the page in case you need to contact Inmagic Technical Support.

1. Open your Web browser and point to <http://WebServerName/InmagicGenie>. Fill in the name of your Web server where the *Genie* application resides. The InmagicGenie virtual directory was created when you installed the application.
2. Log in by typing a username and password combination of "admin"/"admin". The password is case-sensitive. This is the highest-level default username/password combination. We strongly recommend that you change the password at your earliest convenience. To learn about the other default username/password combinations, how to change passwords, and other security features, see the *Inmagic Genie Security Notes*.
3. Choose **Suppliers>Search Suppliers**.

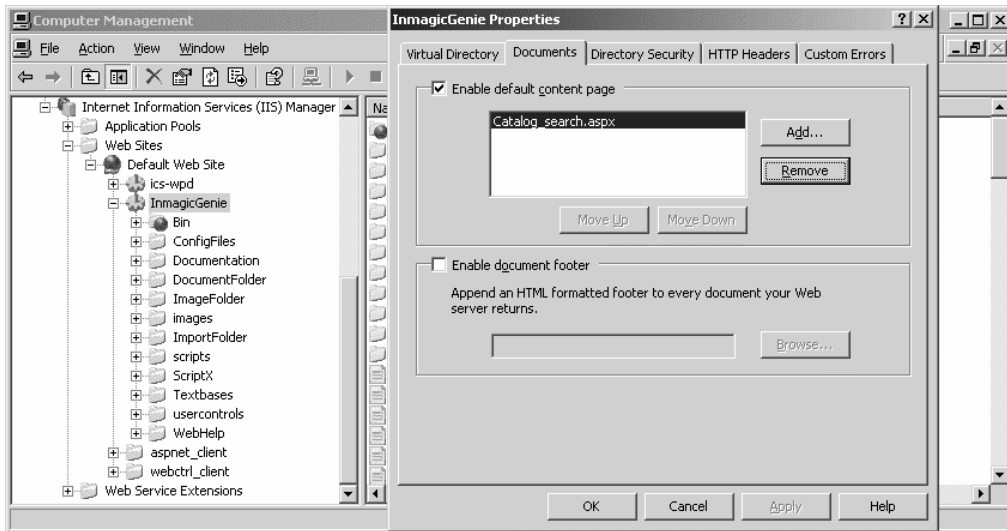
Note: If you are using *Genie Express*, you will not have a Supplier Search page. However, you can perform a similar test using the Catalog Search page.

4. On the Supplier Search page, click the **Browse** button next to the **Company Name** box, select a Supplier from the list, and click the **Add** button. Do this multiple times if you like. When you are finished selecting Suppliers, click the **Close** button.
5. Click the **Submit Query** button.
6. On the Search Results page, click the **Edit** link for any Supplier record. Supplier information should appear for the record (for example, there is a company name, address, and Web site URL). Note that not all boxes for the record may be filled in, but some information should appear for the record.
7. On the Edit Supplier Record page, make a mental note of the current value in the **State/Province** box, then click the **[Browse]** link for the box, select an item from the list, and click **Replace All**.
8. Click the **Save** button. Verify that Record updated successfully. appears in the messages area of the page.
9. Change the contents of the **State/Province** back to the original value, and click **Save** again.

### To change the default content page

Out of the box, after you log in, the *Genie* application opens the Catalog Search page (catalog\_search.ASPX). You can change this if you want.

1. Go to IIS, right-click the InmagicGenie virtual directory, and select Properties to open the InmagicGenie Properties dialog box.
2. Select the Documents tab.
3. Remove the catalog\_search.ASPX entry.



**Figure 32: Inmagic Genie Properties dialog box with Documents tab**

4. Add the .ASPX file you want as your default page.

For example, if you check out loans frequently, you may want to default to the Check Items Out page; add the loans\_checkout.ASPX file. For the names of the .ASPX pages, see the root of your *Genie* installation folder. The pages are easily identifiable by their file names, which generally follow the format of textbase name\_function.ASPX.

## To wrap up the installation process

After successfully testing access to the *Genie* application, wrap up the installation process by telling your library administrator:

- **Where you installed the *Genie* application and its textbases.** The library administrator will need to know this to be able to access the *Genie* README file, which is also available from the Inmagic Customer Extranet.
- **To read the README file.** This file, located in the Documentation subfolder of the main *Genie* installation folder, provides information that the library administrator will need to know, including how to set up the application with the library data for your organization and how to access the application.
- **If necessary, to edit the ICSWeb.INI file to point CS/WebPublisher PRO to the appropriate set of *Genie* textbases.** The library administrator will have to edit the ICSWeb.INI file if she or he decides to use the set of *Genie* textbases other than what was chosen during the installation of the product. For example, the library administrator may later decide to point to the sample textbases for training purposes. To do this, you have to edit the ICSWeb.INI file. You cannot point to the real and sample textbases in the ICSWeb.INI file at the same time; only one set of *Genie* textbases can be specified in the INI file. The library administrator may have to work with the Web server administrator to update the .INI file.
- **The username/password combination of “admin/admin” that gives the highest-level access to the application.** To be able to log in to the *Genie* application, the library administrator needs to know this username/password combination. We strongly recommend that you change the password at your earliest convenience. To learn about the other default username/password combinations, how to change passwords, and other security features, see the *Inmagic Genie Security Notes*. For example, to take advantage of Windows Authentication enabling the login bypass feature, you need to add user login names to the *Genie* application.
- **For non-U.S. installations, to specify the correct date and currency options.** This involves setting the culture in WEB.CONFIG, and the correct date format in DBTEXT.INI and MyGenie.Config. See the *Inmagic Genie Technical Notes* for instructions.

## About Other Installations

---

When displaying labels or a report designed for printing for the first time, the end user will be prompted to install the ScriptX software that provides the *Genie* application with more control over printing (this software, for example, adjusts margins correctly depending on what you are printing, it suppresses the Web browser’s headers and footers, and it allows for specifying page breaks for long reports). This message will appear the first time this software is needed on a workstation. Once the software is installed, the end user will not encounter the message again on that workstation.

To install the ScriptX software, click the **Install** (or **Yes**) button that appears on the message box.

Once the labels or report appear on a page, the end user can use the print mechanism for the Web browser to print the page (for example, choose **File>Print**).

## Genie 3.30 Features Not Enabled

---

The following features are not enabled out-of-the-box, for the reasons given below. If you choose to enable these features, follow the instructions below. Note: To reload .CONFIG files after modifying them, click the **Reset** button on the window that opens after clicking the **About Genie** link at the top of the *Genie* menu.

- **Alternate OPAC Search screen**

*Reason:* This search screen uses a different method to evaluate search criteria than the other search screens in *Genie*. For example, users can type words without specifying an & symbol between them to find any records including all of the words.

*To enable:* Modify the following section at the bottom of the MyQueries.CONFIG file to include the bold line.

```
<!-- ** Note: Use special TextbaseName="Opac" to specify the screens listed in the opac.aspx -->
<inmg:QueryScreens TextbaseName="Opac">
  <inmg:QueryScreen Name="alt_opac_search"></inmg:QueryScreen>
  <inmg:QueryScreen Name="simple_opac_search"></inmg:QueryScreen>
  <inmg:QueryScreen Name="opac_search"></inmg:QueryScreen>
</inmg:QueryScreens>
```

*Tip!* You may also want to remove the other <inmg:QueryScreen> lines in the section shown above so only this screen is available, and modify the Title= value below in the query screen definition.

```
<inmg:QueryScreen Name="alt_opac_search" Title="Alternate Catalog Search"
AlternateSyntax="true">
```

- **Patron self-service**

*Reason:* Some libraries do not want patrons to be able to check out and/or renew library materials themselves.

*To enable:* Self-checkout is available to OPAC users if the <OpacPages> element in MyGenie.CONFIG contains the page name **opac\_checkout.aspx**. Self-renewal is available to OPAC users if that element contains the page name **opac\_loans\_search.aspx**. Add or remove the appropriate page(s) to enable or disable one or both of these features.

In addition to the pages listed in MyGenie.CONFIG, links to the pages in question are needed outside of the Genie application. Add the appropriate links to your intranet, and/or publish the URLs of private versions of these pages for OPAC users to add to their browser Favorites. For more information, see the *Inmagic Genie Technical Notes*.

- **Table of Contents upload and routing**

*Reason:* Many customers are unlikely to use this feature. Also, in order to extract text from a Table of Contents PDF file and make it searchable, the CS/Importer has to be set up properly.

*To enable:* The Serials edit screen definition in MyEditScreens.CONFIG includes a commented-out section for uploading a ToC image (not a document). Find that section near the end of the definition and remove the comment characters. Also consider exposing links to the Table of Contents images in reports. See the commented-out <ItemInfo...> section in the CatalogFull report in MyReports.CONFIG for an example.

- **My Genie pages for end-users**

*Reason:* The GenieKey textbase needs login records for each user and borrower IDs added before this feature can be enabled and used.

*To enable:* In MyGenie.CONFIG, look for the commented-out element `OpacMyGenie`. Remove the comment characters.

- **Items searching for end-users**

*Reason:* End users are unlikely to need to search for Item records, unless they are searching the text extracted from tables of contents.

*To enable:* In MyGenie.CONFIG, look for the commented-out element `OpacSearchItems`. Remove the comment characters.

- **Bulk Item record generation**

*Reason:* This feature was implemented to enable efficient creation of Item records for hundreds of volumes associated with a single Catalog record. U.S. law libraries, for example, may order the Federal Reporter, which contains close to 1000 volumes.

*To enable:* In MyEditScreens.CONFIG, look for the commented-out element `<Button Name="GenerateItems" ...>`. Remove the comment characters. If you plan to create large numbers of Item records, also consider limiting the number that appear in specific circumstances. See descriptions of the `AllowPaging` attribute in MyEditScreens.CONFIG, and the `MaxItems` attribute in MyReports.CONFIG in the *Inmagic Genie Technical Notes*.

- **Bar code label report**

*Reason:* The "Free 3 of 9" font that is used in the report must be downloaded and installed on any workstation that will be printing bar code labels, before this report can be used. See instructions in the *Genie* help.

*To enable:* In MyReports.CONFIG, look for the ReportList for the Items textbase. Find the commented-out element `<Report Name="BarcodeTriple3x10" ...>`. Remove the comment characters.

## Enabling Genie 3.30 Features for Upgrades

---

For customers upgrading from *Genie* version 3.20, a number of new *Genie* 3.30 features require copying information from the non-My version of the .CONFIG file to the corresponding MyXXXX.CONFIG file, as described below. Please see the previous section, as well.

**Tip!** See Inmagic Technical Support Knowledgebase #3006 for information on using third-party tools to make this process easier.

- **Textbase changes**

The following changes require opening each textbase in TextWorks.

Serials textbase – Choose **Maintain>Edit Textbase Structure**, then click the **Edit Fields** button.

**Note:** Exclusive access to the textbase is required to use Edit Textbase Structure.

Select the SerDateToRoute field, uncheck **Require Strictly Correct Type** in the Type Information group, and click **Change**. Select the SerClaimHistory field, select **Date** from the **Field type** drop-down list in the Type Information group, and click **Change**. Click **Finish**, then **OK**.

Catalog textbase – Choose **Display>Design Form**, then select the WebPrint form. Select the third box on the form (the second red box), and choose **Tools>Box Properties**. For the first Fixed Text item in the Contents list, remove the <b> from the end of the string. Click the **Replace** button then the **Close** button, then choose **Form Operations>Save Form**.

- **Edit new Serial record from the Edit Catalog Record page (MyEditScreens.CONFIG)**

On the Edit Catalog Record screen, after clicking the Create Serial Record link on the Serials tab, a new Edit Serial Record link will appear. When you click this link, the Set Up Serial Arrival Pattern screen appears in a pop-up window. To enable this feature, make the following change to MyEditScreens.CONFIG in the catalog\_edit screen.

Add this link to your existing Edit Catalog Record screen by copying the following section from the catalog\_edit screen in EditScreens.CONFIG and pasting it into the same location in MyEditScreens.CONFIG.

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

- **Set Up Serial Arrival Pattern changes (MyEditScreens.CONFIG)**

Make the following changes to the serials\_setup screen in MyEditScreens.CONFIG.

Add the new **Save All** and **Close** buttons to the Data Entry toolbar. **Save All** is used when updating the arrival pattern in all Serial records for the same Title. **Close** only appears when the page is launched using the new **Edit Serial Record** link on the Serials tab of the Edit Catalog Record page.

```
<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="Duplicate" Text="Duplicate"/>
  <Button Name="PrevRecord" Text="Prev"/>
  <Button Name="NextRecord" Text="Next"/>
  <Button Name="Close" Text="Close" />
</Toolbar>
```

To automatically clear the Routing List box when creating a duplicate record on the Set Up Serial Arrival Pattern screen, add the ClearOnDuplicate="true" option shown below.

```
<Field Name="SerRouteList" Type="TextBox" CssClass="serials_edit_textinput"
ClearOnDuplicate="true" Width="50%" NumLines="5" ShowBrowse="true"
BrowseType="FIELD_VALUE" BrowseTN="Borrower" BrowseField="BorrName"></Field>
```

Remove Required="true" from the Start Date, Duration, and Frequency boxes, as shown below.

```
<Field Name="SerDateStart" Type="TextBox" CssClass="serials_edit_qtr_textinput" Width="174"
ShowCalendar="true"/>
...
<Field Display="Duration (months)" Type="TextBox" CssClass="serials_edit_qtr_textinput"
Width="174" ToolTip="Enter the number of months in the duration of the
subscription.">%%SerialDuration</Field>
...
<Field Name="CatSerFrequency.SerCatID" Display="Frequency" Type="DropDownList"
CssClass="serials_edit_qtr_textinput" Width="174"></Field>
```

- **Edit Serial Record screen changes (MyEditScreens.CONFIG)**

Edit the serials\_edit screen in MyEditScreens.CONFIG to add a new Set Up Arrival Pattern button under the existing NextRecord button.

```
<Button Name="Setup" Text="Set Up Arrival Pattern" NewRow="true" />
```

Also, change the NumLines for the SerNotes field to "2" as shown below.

```
<Field Name="SerNotes" Type="TextBox" CssClass="serials_edit_textinput" NumLines="2"></Field>
```

- **Table at bottom of Edit Items page (MyEditScreens.CONFIG)**

To specify the sort and fields in the table at the bottom of the Edit Items page, copy the following section from the items\_edit screen in EditScreens.CONFIG and paste it into MyEditScreens.CONFIG. If you do not perform this step, the Volume and Issue will be included, but the sort will be by ItemID ascending instead of descending.

```
<ItemsGrid SortBy="-ItemID">
  <Field Name="ItemID" Width="60" />
  <Field Name="ItemBarCode" Width="100" />
  <Field Name="ItemCopyInfo" />
  <Field Name="ItemVolume" Label="Vol." />
  <Field Name="ItemIssue" Label="No." />
  <Field Name="ItemLocation" />
</ItemsGrid>
```

- **Issue-Only Arrival Pattern for Serials (MyGenie.CONFIG)**

To enable the ability to create an issue-only (no volume) arrival pattern using the Set Up Serial Arrival Pattern screen, add the bold line shown below to MyGenie.CONFIG.

```
<add key="VolumeIssueFormat" value=": v. {v}, no. {i}" />
<add key="IssueOnlyFormat" value=": no. {i}" />
<add key="MovedIssueFormat" value="{d} (expected), {t} (recd): {V}" />
```

- **Add new Daily Arrival Patterns for Serials (MyGenie.CONFIG)**

To add the new daily arrival patterns that omit Sundays or weekends, add the bold lines shown below to MyGenie.CONFIG.

```
<SerialFrequency>
  <Frequency Pattern="X1" Display="" Default="true" />
  <Frequency Pattern="Y1" Display="Annual" />
  <Frequency Pattern="M6" Display="Semiannual" />
  ...
  <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>
```

- **Specify stop words to use with Alternate Search Syntax feature (MyGenie.CONFIG)**

Add the lines shown below to MyGenie.CONFIG, for example, under the existing CurrencyFormat key.

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

- **Specify which fields to copy from Catalog to Serials (MyGenie.CONFIG)**

This change is only necessary if you want to specify additional fields (other than Title and CatID) to copy from Catalog to Serials when using the Create Serial Record link on the Serials tab of the Edit Catalog Record screen. To do so, copy the following section from Genie.CONFIG to MyGenie.CONFIG, then specify the additional fields. Note that the appropriate Orders field contents (Supplier ID and Start Date) also are still copied to the new Serial record.

```
<!-- Map the Catalog fields that you want to copy to the Serials textbase from the Edit Catalog
screen. -->
<CatalogToSerialMap>
  <Field Catalog="CatID" Serial="SerCatID" />
  <Field Catalog="CatTitle" Serial="SerTitle" />
</CatalogToSerialMap>
```

- **Changes to Print Routing List on Label report (MyLabels.CONFIG)**

Copy the LabelRoute3on8.5x11 label from Labels.CONFIG to MyLabels.CONFIG, replacing the existing copy, then redo any changes you may have made to this label. This will add the Mail Stop to this label and address a minor formatting issue.

- **Add Renew Subscriptions option to Orders section of menu (MyNavbarMenuData.CONFIG)**

Copy the bold line shown below into MyNavbarMenuData.CONFIG.

```
<Item Id="Receiving_Order" Look-LeftIconUrl="receiving-orders.gif" Text="Receiving Orders"
NavigateURL="orders_Search.aspx?Receiving=true" permission="Administrators
Catalogers"></Item>
<Item Id="Order_Renew" Look-LeftIconUrl="order-serials.gif" Text="Renew/Reorder"
NavigateURL="orders_search.aspx?type=renew" permission="Administrators
Catalogers"></Item>
```

- **Add new OPAC Alternate Catalog Search screen (MyQueries.CONFIG)**

Copy the alt\_opac\_search search screen from Queries.CONFIG to MyQueries.CONFIG. Note that this search screen is not visible by default. See the previous *Genie 3.30 Features Not Enabled* section for information on exposing this screen to OPAC users.

- **Add new Renew/Reorder search screen (MyQueries.CONFIG)**

Copy the orders\_renew search screen and the following section (which creates the search screen drop-down list) from Queries.CONFIG to MyQueries.CONFIG.

```
<!-- query screen options of a textbase -->
<inmg:QueryScreens TextbaseName="Orders">
  <inmg:QueryScreen Name="orders_search"></inmg:QueryScreen>
  <inmg:QueryScreen Name="orders_renew"></inmg:QueryScreen>
</inmg:QueryScreens>
```

- **Add Claim History box to Serial Search screen (MyQueries.CONFIG)**

Add the following line to the serials\_search screen in MyQueries.CONFIG, immediately above the <QueryField Type="ButtonRow" ... /> line.

```
<QueryField Type="QueryField" CssClass="SearchTextInput" LabelCssClass="SearchLabel"
ShowBrowse="true" ShowBoolean="true" FieldList="SerClaimHistory" ShowCalendar="true"/>
```

- **Add Routing Information and Link to Borrower Full Display screen (MyReports.CONFIG)**

Copy the following changes in the BorrowerFull report from Reports.CONFIG to MyReports.CONFIG.

Add the bold string below to the first line:

```
<inmg:Report Name="BorrowerFull" ShowManageRouteListLink="true">
```

Add this new section:

```
<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>
```

- **Add new Reports (MyReports.CONFIG)**

Copy the following new and modified reports from Reports.CONFIG to MyReports.CONFIG.

```

LoanOverdueSelect
EmailLoanOverdue
SerialsClaim (replacing the older version)
EmailSerialsClaim
SerialsRoute
EmailSerialsRoute
Route1on8.5x11 (replacing the older version)
SerialsRouteMaint
OrdersRenew
OrdersClaimSelect
EmailOrdersClaim
ALAForm (optional, to print ILL reports)
ILLClaimSelect
EmailILLClaim

```

*Tip!* If you include the ALAForm report, modify the [Library Name], [Telephone], and [Address] strings at the bottom of the report definition to match the information for your library.

Also, update the <inm:ReportList> sections at the bottom of MyReports.CONFIG for each of the following textbases.

- Add the LoanOverdueSelect report to the Loans section.
- Add the OrdersRenew and OrdersClaimSelect reports to the Orders section.
- Add the SerialsRoute and SerialsRouteMaint reports to the Serials section.
- Create a section for ILL as shown below.

```

<inmg:ReportList TextbaseName="ILL">
  <Report Name="ILLBrief" Display="Summary Report"/>
  <Report Name="ILLClaimSelect" Display="Status Check"/>
  <Report Name="ALAForm" Display="ALA Request Form" PageName="batch_print.aspx"/>
</inmg:ReportList>

```

- **Modify the Statistics page to use the new checkbox reports (MyStatistics.CONFIG)**

Modify the Statistics page to use the new configurable Overdue Notices report for the Overdue Loans sections. Change each of the occurrences of this tag in MyStatistics.CONFIG:

```
<View>loansoverdue_report.aspx</View>
```

To say this instead:

```
<View Report="LoanOverdueSelect">loans_report.aspx</View>
```

The default MyStatistics.CONFIG file has four sections for Overdue Loans.

Also, modify the Route Serials section to use the new E-mail Routing Notices report. Change the bold line below to use SerialsRoute as shown.

```

<inmg:Statistic Name="route_serials">
  <Label>Route Serials</Label>
  <Textbase>Serials</Textbase>
  <View Report="SerialsRoute">serials_report.aspx</View>
  ...

```

## About *Genie* Documentation

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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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