

# Inmagic® Genie 3.5

## Installation and Upgrade Instructions

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.

**Purpose:** This document pertains to the non-SQL version of Genie v3.5. Please see the Readme.htm on the [Inmagic Extranet Download page](#) for details on this release.

If you are using the **SQL** platform, please obtain the SQL-specific Installation and Upgrade Instructions from the [Inmagic Extranet Download page](#).

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## Before You Begin

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This information applies to new installations as well as upgrades.

### Genie Component Requirements

Genie consists of three components. Upgrades can be performed in any order, but new installations must be installed in the order specified below.

1. Install **DB/TextWorks**.  
This step may be done before or after installing WebPublisher PRO.
2. Install **WebPublisher PRO**  
This may be on either on the same server as DB/TextWorks, or on a different server.
3. Install **Genie**.  
This must be on the same server as WebPublisher PRO.

Each component has its own Setup program and *Installation and Upgrade Notes*.

### System Requirements

Requirements for all three components are specified in the *Inmagic Genie Support Matrix*, which is available on the Inmagic Customer Extranet. **Important!** Please be sure that you have met the requirements before proceeding.

### Pre-installation Tasks

Before you install or upgrade Genie, complete the following tasks:

- **Verify that WebPublisher PRO can search a textbase and edit a record.** You must be able to search and edit records with WebPublisher PRO before installing Genie. If the CARS textbase was installed with WebPublisher PRO, you can perform the following test:
  - a. Point your browser to `http://WPPserver/dbtw-wpd/sample/carsqs.htm`, where **WPPserver** is the Web server where WebPublisher PRO is installed.
  - b. Type an asterisk (\*) in the **Model Type: Assembled or Kit?** box and click **Submit Query**. A successful search will display the search results.
  - c. From the drop-down list, select **Prices (edit links)**.
  - d. Select the **Edit Record** link for any record, then modify any field.
  - e. Click **Submit Record**. A successful record save message should appear.
- **Exit all Windows applications.** Also ensure that the PowerPack services (Importer, Checker, Updater) are not running.
- **Log in with Administrator access.** Log in as Local Administrator or a domain user with local administrator privileges before you start the installation.
- **Know your organization's validation override preference for Browse lists.** You will be asked for this during installation. We recommend that Genie be configured to accept overrides and update the corresponding validation list. The other option is to disallow overrides (reject records that do not comply with content validation.) Consult with your library administrator.
- **Know whether you will install the Sample textbases.** We recommend that new installations install the sample textbases, because the library staff may want to use them to learn the application. Upgrades probably already have these textbases installed. Consult with your library administrator.
- **Serial number.** Have your Genie serial number available. You will be asked for it during installation.

## Installing Genie 3.5 (New Installations Only)

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These instructions pertain only to new installations, not to upgrades. For upgrades, see page 12.

Installing Genie involves the following main steps:

- Step 1 - Install Inmagic Genie 3.
- Step 2 - Set Windows Permissions on Textbase Folders
- Step 3 - Test and Wrap-up

### Step 1 - Install Inmagic Genie 3.5

In this step, the following actions will be performed:

- A directory structure will be created for the Genie program files (folder and subfolders).
  - The virtual directory required by the Genie application will be created and configured.
  - You will be prompted to select the IIS authentication method for the Genie application.
  - SOAP files necessary for Genie will be copied to the Soap subfolder of the installation folder for WebPublisher PRO.
1. On the Web server where WebPublisher PRO is installed, log in with Administrator privileges (for example, Local Administrator or a domain user with local administrator privileges).
  2. Download the Genie ZIP file and unzip it to a temporary folder on the server where WebPublisher PRO is installed. Then, from within that folder, double-click **Setup.EXE**.

The Setup program will not proceed if Microsoft .NET Framework Version 3.5 Service Pack 1 is not already installed. This requirement was stated in the Genie Support Matrix.

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



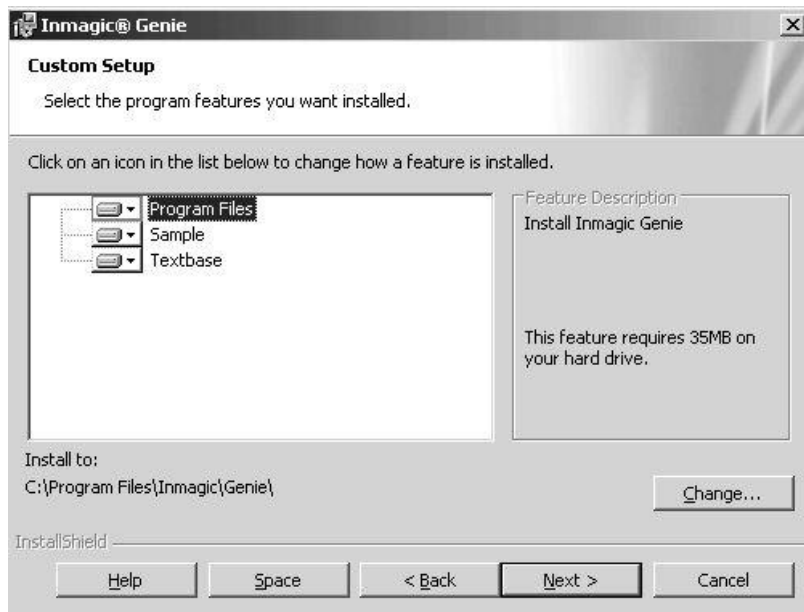
4. Read the license agreement and respond appropriately.



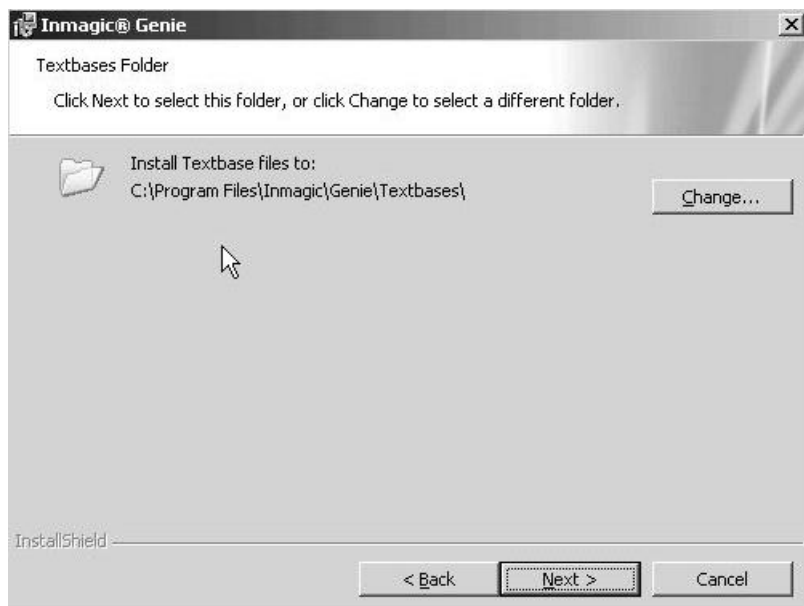
5. On the Customer Information dialog box, enter your name, your company name, and the Genie serial number, then click **Next**.

The screenshot shows a window titled "Inmagic® Genie" with a "Customer Information" header. Below the header, it says "Please enter your information." There are three text input fields: "User Name:" with the placeholder text "Your Name", "Organization:" with the placeholder text "Your Company", and "Serial Number:" with the placeholder text "GN99-999-9999". At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

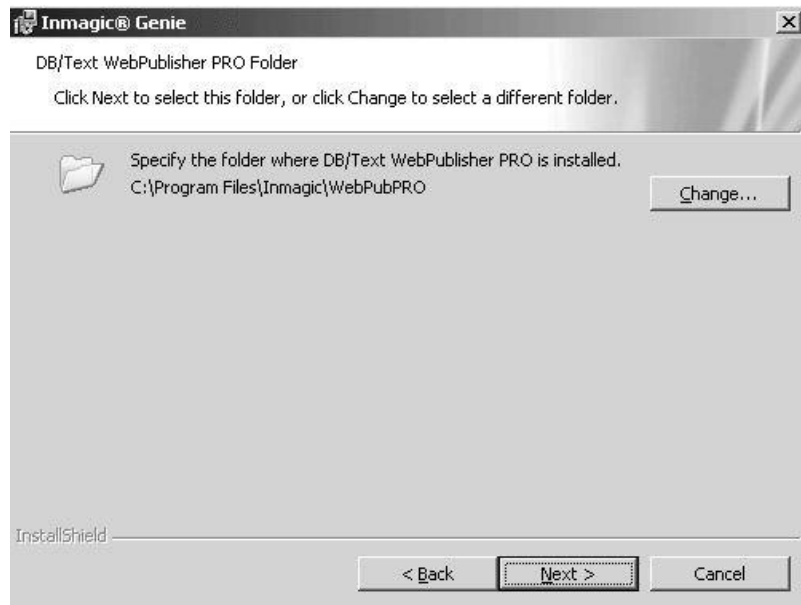
6. On the **Custom Setup** dialog box, make any desired adjustments, then click **Next**. You can accept the default files and locations, or make changes using the options described below:
  - **Program Files.** Installs the Genie program files.
  - **Sample.** Installs textbases populated with sample data, to help you learn the application. The default location is C:\Program Files\Inmagic\Genie\Textbases\Sample.
  - **Textbase.** Installs empty textbases (no records, except in the GENIEKEY and SUPPLIER textbases), so you can load your own data into them. The default location is C:\Program Files\Inmagic\Genie\Textbases.



7. On the **Textbases Folder** dialog box, accept the default location for the Genie textbase files (C:\Program Files\Inmagic\Genie\Textbases) or click the **Browse** button to change it. Note that Setup will edit **DBTWPUB.INI** to point WebPublisher PRO to this location for the Genie textbases.



8. On the **DB/Text WebPublisher PRO Folder** dialog box, indicate where WebPublisher PRO is installed. The default is C:\Program Files\Inmagic\WebPubPRO.



9. On the **Validation Overrides** dialog box, specify one of the following options, then click **Next**.
- **Yes, accept overrides and update lists.** Genie will be configured to accept validation overrides and update the corresponding validation list. This is the recommended choice.
  - **No, reject records that do not comply with content validation.** Genie will not permit overrides.

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



10. On the **Web Site Information** dialog box, specify the settings to use with your InmagicGenie and InmagicBrowse virtual directories, then click **Next**.
  - **Web Site Name.** Specify the Web site on which to create the InmagicGenie virtual directory. This must be the same Web site as the WebPublisher PRO virtual directory (dbtw-wpd).
  - **Web Site Security.** Select an authentication method 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.

**Important!** Do not select **Integrated Windows Authentication** unless the virtual directory for WebPublisher PRO has Anonymous Authentication selected.



11. When you see the **Ready to Install the Program** dialog box, click **Install** to begin.
12. Wait while Genie is installed. A status bar will indicate the progress.
13. On the **Wizard Completed** dialog box, check **View Readme** to read or print the file. If you select **Check for Service Packs**, your Web browser will open to the Inmagic Customer Extranet Service Pack page. We recommend that you check both options. Then click **Finish**.



## Step 2 - Set Windows Permissions on Textbase Folders

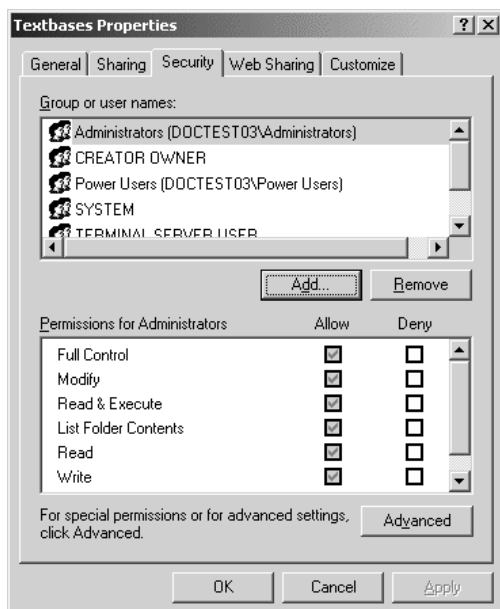
If you selected **Anonymous Access** when setting up the InmagicGenie virtual directory, **you can skip this section** because the Genie installation assigned the necessary Windows rights to the folders.

If you selected **Integrated Windows Authentication** or **Basic Authentication**, follow the instructions below to set Windows permissions on the folder where you installed the Genie textbases, to allow users to search and/or modify them.

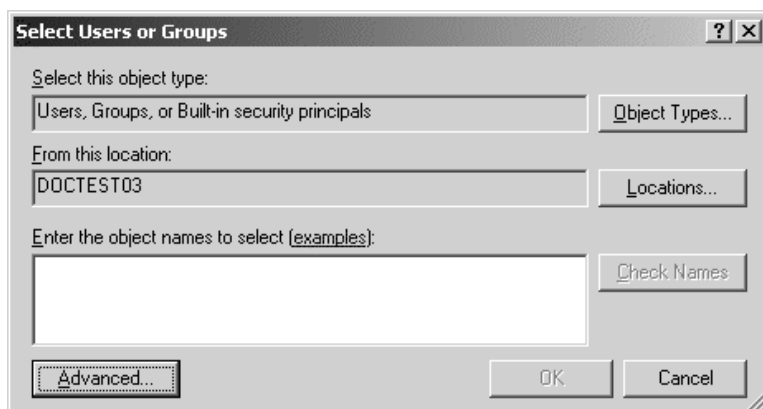
The instructions below are for a Windows 2003 machine. Other operating systems may vary slightly.

1. Right-click the folder where you installed the Genie textbases and choose **Properties** from the shortcut menu:
  - If you installed the empty textbases, the default is C:\Program Files\Inmagic\Genie\Textbases.
  - If you installed the sample textbases, the default is C:\Program Files\Inmagic\Genie\Textbases\Sample.
2. Select the **Security** tab in the Textbases Properties dialog box.
3. In the **Group or user names** list, select the domain user or group account that will be using the Genie application, and provide **Modify** and **Write** permissions.

**Note:** If the account you want is not in the list, follow the steps below. Otherwise, you are now done applying permissions to the selected folder and you can click **OK** to close the dialog box.

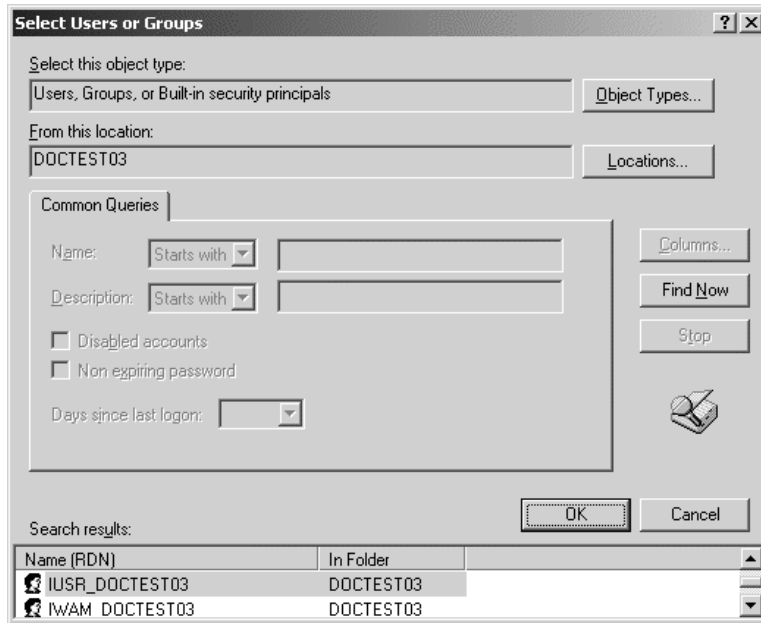


4. Follow this step only if the desired Group or user name was not in the list:
  - a. Click **Add**, then open the **Locations** dialog box and select the Windows domain.
  - b. When your Windows domain is showing in the **From this location** box, click **Advanced**.





- c. Click **Find Now** to display a list of your user and group accounts in the **Search results** box.



- d. Select the user or group account from the list and click **OK**.
- e. Click **OK** again to return to the Textbases Properties dialog box.
- f. Now you can select the domain user or group account that will be using the Genie application, and provide **Modify** and **Write** permissions.
- g. Click **OK** to close the dialog box. You are now done applying permissions to the selected folder.
5. In the rare case that you installed **both** of the supplied textbase sets, select the other folder and repeat this entire procedure to provide **Modify** and **Write** permissions for it, as well. The default folder locations are shown below:
- C:\Program Files\Inmagic\Genie\Textbases
  - C:\Program Files\Inmagic\Genie\Textbases\Sample

You have now finished applying permissions and you can proceed to test and wrap-up.

## Step 3 - Test and Wrap-up

After installing Genie, perform the following test to make sure the application is accessible. If any of these steps fails, there may be a problem with the installation. If an error message appears anywhere during this test, check the Inmagic Knowledgebase, available through the Inmagic Customer Extranet. Make a note of the exact text of the message or print the page in case you need to contact Inmagic Technical Support.

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

1. Point your browser to `http://ServerName/InmagicGenie`, where **ServerName** is the Web server where the Genie application is installed. 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*.

**Login Error 405:** If you are unable to log in due to a 405 error, you may need to correct a Handler Mapping in IIS. This may occur if you installed Genie on Windows 2008. For instructions on how to resolve the problem, go to the Inmagic Customer Extranet and search the Inmagic Support Knowledgebase for "405".

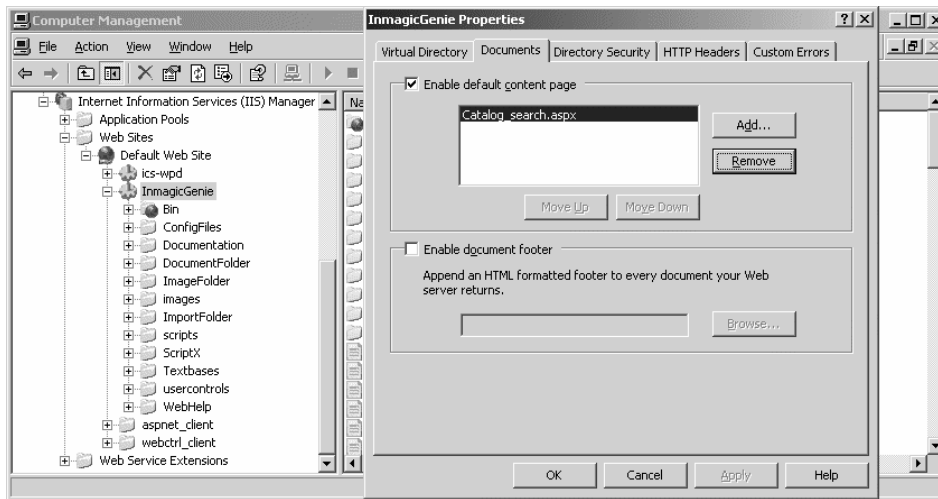
3. Choose **Suppliers>Search Suppliers**.
4. On the Supplier Search page, click the **Browse** button next to the **Company Name** box, select a Supplier from the list, and click the **Add** button. Do this multiple times if you like. When you are finished selecting Suppliers, click the **Close** button.
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 **Save**. 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 (optional)*

By default, after you log in, Genie opens the Catalog Search page (`catalog_search.aspx`). You can specify a different default page, if you want.

For example, if you check out loans frequently, you may want to default to the Check Items Out page, so you would specify 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`.

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, as shown in the following figure.



3. Remove the catalog\_search.ASPX entry.
4. Add the .ASPX file you want as your default page.

### ***To wrap up the installation process***

It is important to provide your library administrator with the following information.

- **Where you installed the Genie application and its textbases.**
- **README file.** This file, located in the Documentation subfolder of the 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. The Readme file is also available from the Inmagic Customer Extranet.
- **DBTWPub.INI points WebPublisher PRO to the appropriate set of Genie textbases.** Library administrators may decide to use the set of Genie textbases other than what was chosen during the installation. For example, they might decide to point to the Sample textbases for training purposes. To do this, it is necessary to edit DBTWPub.INI (the default location is C:\Program Files\Inmagic\WebPubPRO\DBTWPub.INI).

DBTWPub.INI specifies the default location(s) for textbases, and can include entries for textbases that are not in the default location. For example:

```
[WebPublisher Defaults]
Default-Textbase-Paths=c:\Program Files\inmagic\webpubpro\textbase\

[WebPublisher Textbase Paths]
cars=c:\Program Files\inmagic\webpubpro\sample\
catalog=c:\data\library\
```

Note that DBTWPub.INI must not point include references to both the real and sample textbases. For example, you cannot point to Cars in the Textbases folder and Cars in the Samples folder.

- **The username/password combination of “admin/admin” that gives the highest-level access to the application.** To log in to Genie, 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, specify 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.

## Upgrading to Genie 3.5

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This section explains how to upgrade from Genie v3.2 or later. Upgrading to Genie version 3.5 involves backing up files, then running Setup.exe.

**Note:** If you are upgrading from a version prior to v3.4, be sure to consult the installation notes for the skipped versions, available on the Inmagic Customer Extranet, for information about enabling or using new features introduced in those releases.

The upgrade process performs the following operations:

- The Genie install kit creates a secondary backup of your existing Genie textbase and config files.
- The existing Genie program files and subfolders are uninstalled.
- Genie 3.5 program files and subfolders are installed in the same location as the prior Genie version.
- Genie textbases and config files from the previous install are restored.
- The previous IIS authentication method is preserved.
- SOAP files necessary for Genie are copied to the Soap subfolder of the installation folder for WebPublisher PRO.

### Step 1 - Manually back up files

**IMPORTANT!** You must MANUALLY back up ALL GENIE FILES BEFORE UPGRADING. Be sure to COPY ALL GENIE FOLDERS AND FILES TO ANOTHER LOCATION ON YOUR SERVER OR NETWORK. (The copied files and folders can be safely deleted after you have successfully upgraded your Genie application.)

### Step 2 - Perform the upgrade

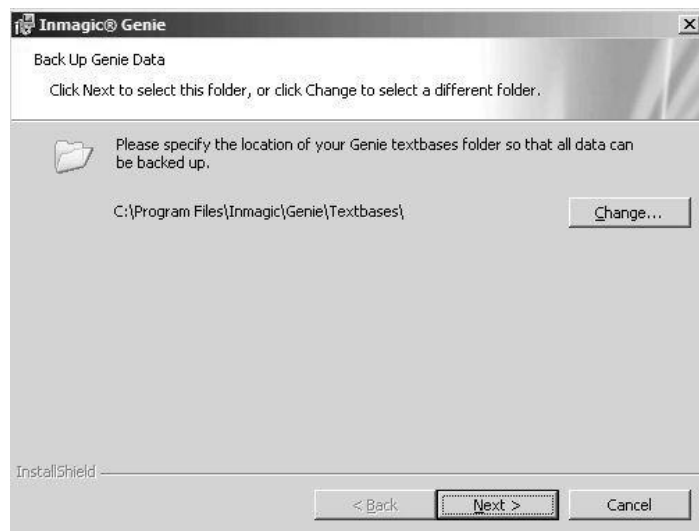
1. On the Web server where WebPublisher PRO is installed, log in with Administrator privileges (for example, Local Administrator or a domain user with local administrator privileges).
2. Download the Genie ZIP file and unzip it to a temporary folder on the server where WebPublisher PRO is installed. Then, from within that folder, double-click **Setup.EXE**.

The Setup program will not proceed if Microsoft .NET Framework Version 3.5 Service Pack 1 is not already installed. This requirement was stated in the Genie Support Matrix.

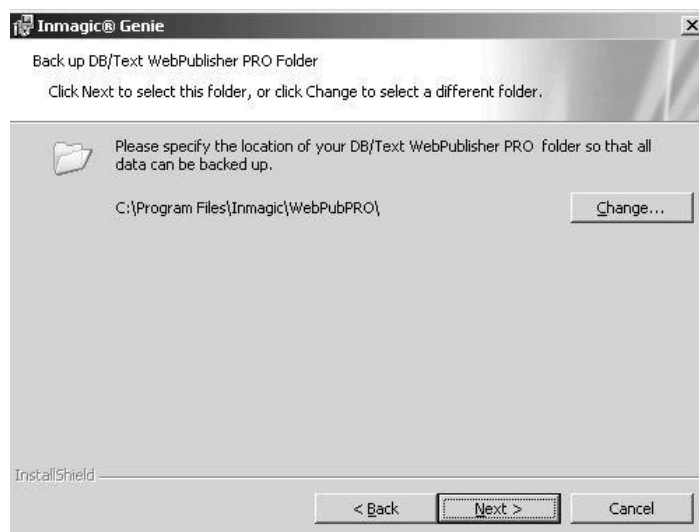
3. Setup detects a previous version. Click **Yes** to upgrade. (If you click **No** the program will exit.)



4. Use the **Back up Genie Data** dialog box to specify the location of your current Genie Textbases folder so that all data can be backed up to a temporary folder. If necessary, click **Change** and browse to the proper folder.



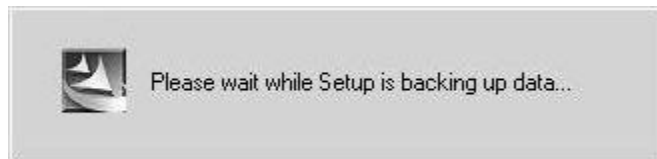
5. Use the **Back up DB/Text WebPublisher PRO Folder** dialog box to specify the location of your WebPubPRO folder so the data can be backed up to a temporary folder. If necessary, click **Change** and browse to the proper folder.



6. The **Ready to Upgrade** dialog box reminds you to back up your current Genie folder, if you have not already done so. Then click **Next**.



7. Please wait while Genie and WebPublisher PRO are backed up. **Note:** After the data is backed up, the old Genie application (3.2, 3.3, or 3.4) will be uninstalled in preparation for the upgrade.



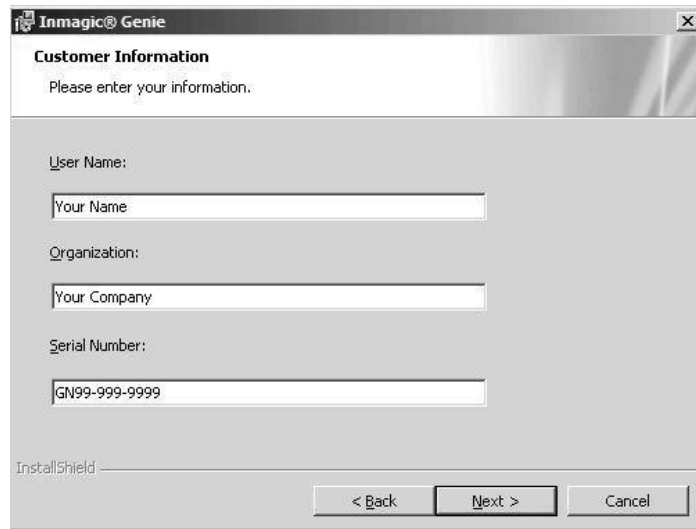
8. When the Welcome screen reappears, click **Next**.



9. Read the license agreement and respond appropriately.

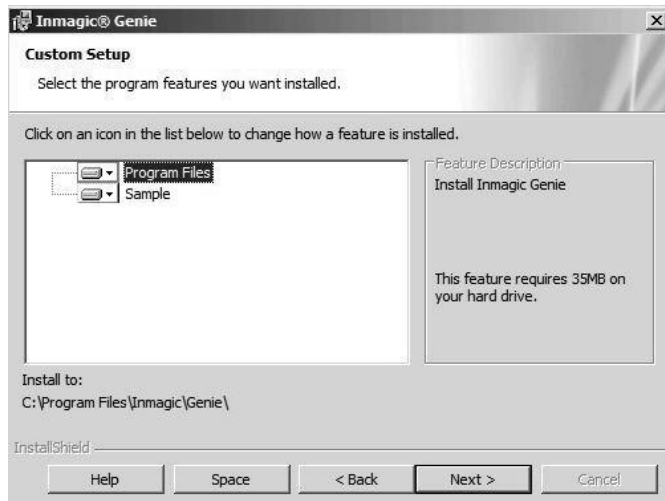


10. The **Customer Information** dialog box is pre-populated with your user name, company name, and Genie serial number. Click **Next**.

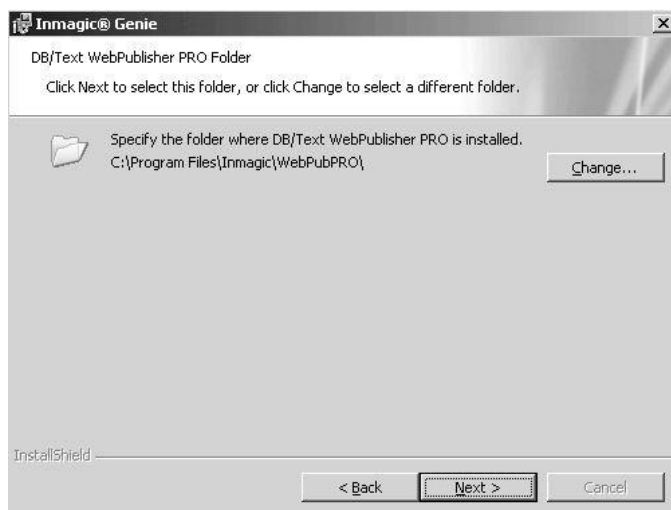


11. On the **Custom Setup** dialog box, click **Next** to accept the defaults, or make any desired changes and then click **Next**. By default, all files will be copied to the same location as your currently installed version of Genie. Your previous Genie textbases will be restored later in the upgrade process.

- **Program Files.** Installs the Genie program files. (required)
- **Sample.** Installs the sample textbases supplied with the application. Since you are upgrading Genie, you probably already have working textbases, so installing the sample textbases is not likely to provide added benefit. If you do install them, any previous modifications you made will be retained.



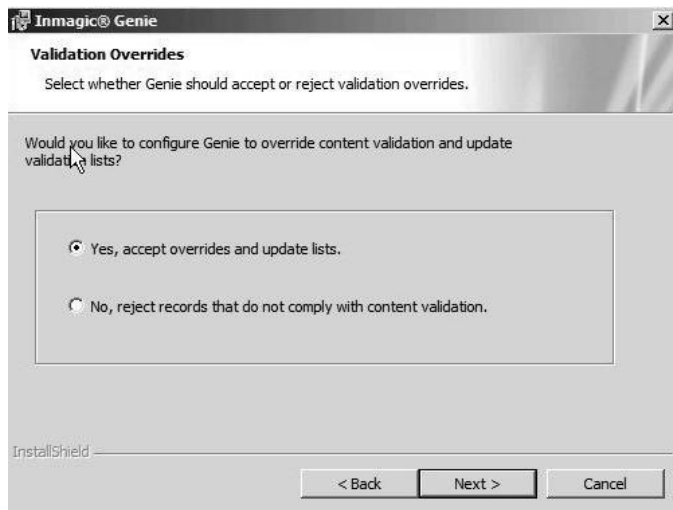
12. On the **DB/Text WebPublisher PRO Folder** dialog box, click **Change**, if necessary, to browse to the location of the DB/Text WebPublisher PRO software. Then click **Next**.



13. On the **Validation Overrides** dialog box, specify one of the following options, then click **Next**.
- **Yes, accept overrides and update lists.** Genie will be configured to accept validation overrides and update the corresponding validation list. This is the recommended choice.
  - **No, reject records that do not comply with content validation.** Genie will not permit overrides.

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

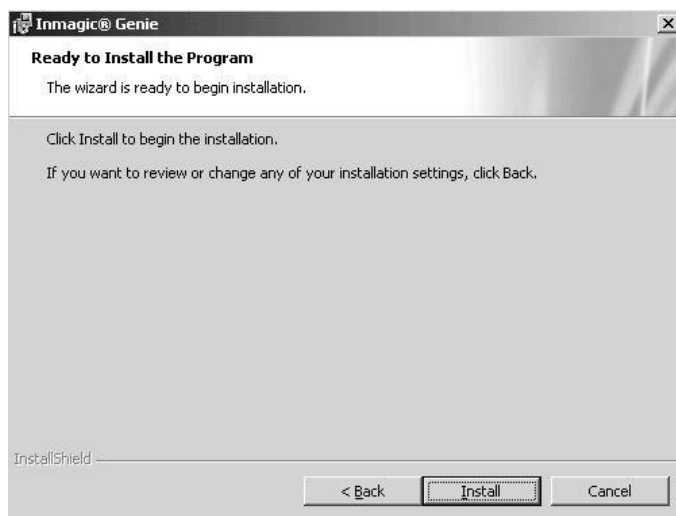




14. A message states that your original Genie Web site selections (e.g., Default Web Site, Non-Default Web Site) and authentication selections (e.g., Anonymous Access, Windows Authentication) have been preserved by the upgrade. Click **OK**.



15. Click **Install** to install the program.



16. A message lists the Genie textbases that already exist in the WebPublisher PRO INI file (DBTWPUB.INI), to notify you that Setup did not change these entries during the upgrade. Click **OK**.

**Note:** If desired, you can edit DBTWPUB.INI at a later time to change the default location(s) for textbases and include entries for textbases that are not in the default location.

17. On the **Wizard Completed** dialog box, check **View Readme** to read or print the file. If you select **Check for Service Packs**, your Web browser will open to the Inmagic Customer Extranet Service Pack page. We recommend that you check both options. Then click **Finish**.



## Installing MARC Services (optional)

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If you are upgrading Genie version 3.4.x, you can skip this section. Genie MARC Services have not changed in 3.5. Genie 3.4 included an optional module you can use to upload MARC Communication format files and have them converted and imported into the Catalog textbase. Read about these services in the InmagicGenieMarcNotes.pdf document.

You can install this optional module after successfully installing or upgrading Genie.

To install this module, navigate to the MarcServices folder in the Genie installer folder and double-click Setup.exe. Specify the folder in which to install the services when asked. The default location is C:\Program Files\Inmagic\Genie. If your copy of Genie is installed in a different folder, you may want to install the services there instead.

## About Genie Documentation

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For important information, please see the Genie README file, which is installed in the default location of C:\Program Files\Inmagic\Genie\Documentation. For other Genie documentation, please check the [Inmagic Extranet Download page](#).

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7 June 2012