

Inmagic® Genie Web Help

Updated: April 2012

Table Of Contents

All In One Book: How Do I.....	3
Add Someone to a Reserve List.....	3
Check in a Serial Issue.....	3
Check In an Item.....	4
Check Out an Item.....	4
Create a Catalog Record.....	4
Create a Serial Record.....	5
Create an Order.....	6
Create Item Records.....	6
Delete an Item Record.....	7
Download Multiple Catalog Records.....	7
Edit an Item Record.....	7
Maintain Routing Lists.....	8
Make an Item Available for Lending.....	8
Mark an Order as Received.....	9
Print Bar Code Labels.....	10
Claim Missing Issues.....	10
Print Labels.....	10
Print Multiple Catalog Records.....	11
Print Routing Notices.....	11
Renew a Loan.....	12
Renew a Subscription.....	12
Search Online.....	12
Send a Request for Items to the Library via E-mail.....	17
Send E-mail Routing Notices.....	17
Send an Overdue Notice for an Individual Item.....	17
Send Batch Notices Via E-mail.....	18
Send Multiple Catalog Records via E-mail.....	18
Set Up an Arrival Pattern.....	18
Set Up the E-mail Function.....	19
Upload BookWhere XML.....	19
Upload a File for a Catalog Record.....	20
Use the InfoCart.....	20
View Statistics.....	22

About the Help File	23
Documentation/Contact Information	23
Other Documentation	23
Contacting Inmagic.....	23
Communicating with Other Users.....	24
Index.....	25

All In One Book: How Do I...

Add Someone to a Reserve List

To add someone to a reserve list, do the following.

1. Choose **Cataloging>Search Catalog**.
2. On the Catalog Search page, enter the title or other search criteria, then submit your query.
3. On the Search Results page, click the **Full Display** link for the record.
4. On the Search Results Full Display Format page, click the **Edit the reserve list** link.
5. On the Edit Reserve List pop-up window:
 - Specify the name of the person you want to put on the reserve list by using the **Browse** link provided.
 - Specify the type of reserve by selecting a choice from the drop-down list. You can specify any copy of this **title**, a copy of the title returned to a particular **location**, or a particular copy (**item**) of the title.
 - If you specified a copy returned to a particular location, use the **Browse** link to specify the location in the box provided. If you specified a particular copy of the title, enter that copy's bar code in the **Item** box.

Tip! For a particular copy of the title, you can copy and paste the bar code from the Search Results Full Display Format page that is still opened in the background into the **Item** box.

Note that the *Bar Code* field is intended to contain an actual bar code or other unique identifier that is visible on the book so that it can be typed into the box when the item is loaned.

6. Click the **Add** button.

Notice at the bottom of the Edit Reserve List pop-up window that the name you added is now listed after anyone else already on the list. After you close the pop-up window, notice that the same is true for the Search Results Full Display Format page where the name(s) you entered now appear in the Reserves section.

Check in a Serial Issue

There are two ways to check in serial issues that have arrived. In both cases, start by selecting the Check In Serials menu command, then searching for the appropriate serials, by expected date of arrival or title.

Check in several issues at once by selecting the Check In or Skip Serials report from the drop-down list (if it doesn't appear automatically). Select the check boxes of issues to check in, then click **Check in** at the top of the report.

Check in issues individually by selecting the Serials Brief report, then editing each record in turn.

If the ability to upload Table of Contents images has been activated, you can only do this on the edit screen. Note that if you have multiple concurrent subscriptions for the same periodical, all of them will be updated to link to the same Table of Contents image that you upload for one copy.

Check In an Item

When you check in an item you can also see if it is on a reserve list.

1. Choose **Loans>Check Items In**.
2. Enter the bar code for the item being checked in. (You can enter or scan more than one bar code at a time.)
3. Click the **Check In** button.
4. If the item is successfully checked in, a **Check for reserves against item(s) checked in** link appears on the page. Click this link to see if the returned item is on a reserve list. Review the information in the pop-up window. If there is a reserve list, the report in the pop-up window will show the request date, borrower name, title, bar code, location, and other information. If there is no reserve list, no records will be found.

Check Out an Item

When you check out an item you can also see more information about the borrower and item (for example, if it has a reserve list).

1. Choose **Loans>Check Items Out**.
2. Enter a borrower name. To see more information about the borrower, click the **Borrower** link in the View Information section.
Tip! Borrower information includes the borrower's privileges, as well as other items they have on loan and whether any are overdue. This information may help you determine whether to proceed with the loan.
3. Enter a bar code for the item. (You can enter or scan more than one bar code at a time.)
 - To see more information about the item (for example, its title), click the **Items** link in the View Information section.
 - To see if the item has a reserve list, click the **Reserves** link in the View Information section. This will show if someone other than this borrower is waiting for the item.

Fill in the term of the loan.

Fill any other field as required.

Click the **Check Out** button. A Loan record will be created for each item. Each loan will be to the same borrower and have the same term.

Create a Catalog Record

You can create a Catalog record when you use the Orders function and when you do not use the Orders function.

To create a Catalog record when you use the Orders function

You use the Orders function to track budget information. If you use this method, the link to create a Catalog record copies pertinent information from the order to the new Catalog record.

When you [mark an order as received](#), you can create a Catalog record at that time.

To create a Catalog record when you do not use the Orders function

1. Choose **Cataloging>Add New Catalog Item**.
2. On the Add New Catalog Item page, fill in at least all the required fields.
3. Click the **Add Record** button.
4. When the Catalog record is successfully saved, notice that you are now on the Edit Catalog Record page.
5. If you want, you can create items for the Catalog record now. Click the **Edit Item(s)** button.
 - a. On the Edit Items pop-up window, fill in at least the **Bar Code** box. Once an item has a bar code, you can start lending it.
 - b. Click the **Add** button. Notice the table at the bottom of the window.
 - c. To add another item, click the **New** button and repeat steps a–c as needed.
 - d. To edit any previous item, click the **Edit** link next to that item in the table at the bottom of the pop-up window. Confirm that the data appears on the window for the item you want, then make your changes.
 - e. Click the **Save** button.
 - f. Click the **Close** button to close the Edit Items pop-up window.

Create a Serial Record

To create a Serial record, do the following. You can create a Serial record for an existing Catalog record.

1. Open the Edit Catalog Record page for the Catalog record for which you want to create a Serial record.
2. Fill in the boxes on the Serials tab, if needed.
3. Click the **Check for Serial Records** link and review the information that appears in the **Corresponding Serial Records** box. If no matching Serial record is found, or if you need a new Serial record for an additional subscription, click the **Create Serial Record** link to create a Serial record.
4. Click the **Save** button (if you did step 2).

Note: To create a Serial record for a new Catalog record you are adding, save the record. That will cause the links mentioned in step 3 to appear on the Serials tab.

If you have multiple subscriptions for the same periodical, you will need a record in the Serials textbase for each subscription. You can click the **Create Serial Record** link once for each subscription, or you can create one record, [set up the arrival dates](#) for that subscription, then duplicate that record as many times as needed, changing the routing list for each, if applicable.

Create an Order

To create an order, do the following. When you create an order, you can include more than one serial or item per order.

1. Choose **Orders>Order Serials** or **Orders>Order Items**.
2. Fill in at least the required fields on the New Order page.
Note: Do not include a currency symbol when you enter the list price for the item.
3. Click the **Add to Item List** button. Notice that your item appears in a table at the bottom of the page.
4. If you have more than one serial or item for this order, click the **New Item** button to clear the page and then repeat steps 2-4 as many times as needed.
5. Click the **Add Record** button to create as many Order records as you have items.

An "item" on an order is an entry with a specific vendor item number, which might be the ISBN for a book or the ISSN for a serial. One order item might be for, perhaps, three copies of a particular book. Upon receipt of this *order item*, *three* Item records will be created in the ITEMS textbase, representing the three physical copies, each of which will have a separate bar code.

To recall the information for an item entered earlier during this order, click the **Edit** button next to the corresponding item in the table at the bottom of the page. After you confirm that the information for the item you wanted is on the page, you can:

- Edit the item. When done, click the **Update Item** button, then click the **Save** button.
- Delete the item. Click the **Delete Item** button, then click the **Save** button.

Create Item Records

You have to create an Item record for each item you want to make available for lending. This is because a bar code or some other unique ID in the *Bar Code* field is necessary for lending purposes. The *Bar Code* field is in the Item record. Once there is an Item record with an associated bar code, the item is available for [checkout](#).

You can create item records in the following ways:

- You can edit an Order record, which you typically do when you [receive an order](#). You use the Edit Order page to receive an order. To create Item records when you receive an order, you use the **Create Item Record(s)** button on the Edit Order page. One Item record is created for each copy specified. After you have created your Item records, you must still [edit the Items records to include their bar codes](#).
- You can also create Item records on the Edit Items pop-up window. Click the **New** button on the toolbar to create a new Item record, then click **Save** after filling in the appropriate fields. Access this window from a number of places in Genie:
 - On the Edit Catalog Record page, click the **Edit Items** button.
 - For those Catalog records that already have Item records, the Full Display page for that record has an **Edit Items** link in the Item Information section.
 - On the Edit Serial Record page, click the **Edit Items** button. You will see all of the Items associated with the Catalog record linked to this serial subscription.

- Use the Item Search screen to find Item records. Click the **Edit** link on the summary report for an item.
- If it has been enabled, a **Generate Items** button on the Edit Catalog Record page brings up a screen on which you can enter information to create multiple Item records at once.

Delete an Item Record

To delete an Item record, you must use the Edit Items pop-up window. Access this window from a number of places in Genie:

- On the Edit Catalog Record page, click the **Edit Items** button.
- For those Catalog records that already have Item records, the Full Display page for that record has an **Edit Items** link in the Item Information section.
- On the Edit Serial Record page, click the **Edit Items** button. You will see all of the Items associated with the Catalog record linked to this serial subscription.
- Use the Item Search screen to find Item records. Click the **Edit** link on the summary report for an item.

Follow these steps to delete an item:

1. If there is more than one item for this catalog record (see the table at the bottom of the pop-up window), click the **Edit** link for the item you want to delete.
2. Click the **Delete** button and confirm your action request.
3. Click the **Close** button.

Download Multiple Catalog Records

You use the [InfoCart](#) to download multiple Catalog records.

Edit an Item Record

To edit an Item record (for example, to add/change a bar code, copy information, call number, location, volume, issue, and other information), you must use the Edit Items pop-up window. Access this window from a number of places in *Genie*:

- On the Edit Catalog Record page, click the **Edit Items** button.
- For those Catalog records that already have Item records, the Full Display page for that record has an **Edit Items** link in the Item Information section.
- On the Edit Serial Record page, click the **Edit Items** button. You will see all of the Items associated with the Catalog record linked to this serial subscription.
- Use the Item Search screen to find Item records. Click the **Edit** link on the summary report for an item.

Follow these steps:

1. If there is more than one item for this catalog record (see the table at the bottom of the pop-up window), click the **Edit** link for the item you want to edit, then make your changes on the Edit Items pop-up window. Note that an item must have a bar code associated with it before the item can be checked out.

2. Click the **Save** button for each Item record. If you are done, click the **Close** button.

Maintain Routing Lists

You can maintain routing lists individually by editing the serial records. Alternatively, you can add or remove borrower names from a group of periodicals in one operation. This topic describes the batch approach.

1. Choose **Serials>Search Serials**.
2. On the Serial Search page, fill in query criteria that will retrieve the serial titles you want to manage. There is no need to be too specific, as you will be able to select individual titles or subscriptions. Then click the **Submit Query** button.
3. On the Search Results page, select the **Maintain Routing Lists** report.
4. In the text box to the right of the form selection list, type or paste the name of a borrower as it would appear on the routing list. The question mark next to the box can be used to browse for a borrower.
5. Select the serials that you want this borrower to either START or STOP receiving. Then click the link button to either add this borrower or remove this borrower on the routing lists of the selected serials.

Below are some examples of how this feature could be used.

Case 1: A borrower is leaving the company, and you want to clear the name off all routings lists.

Procedure: Search for the borrower in the Routing List field in step 2 above, then in step 4, select all of the records and click **Remove**.

Case 2: The library occasionally asks borrowers to update the list of periodicals they want to see.

Procedure: Search the Borrower textbase for the borrower. On the brief display, click the **Full Display** link button. This report shows the periodicals currently routed to that borrower, and includes a link to the Serials search screen. When you click that link, the borrower's name is already filled in. If the borrower wants to see additional periodicals, change the Boolean control next to the name to OR, and browse for additional titles they wish to see in the Title box. Then the subsequent report will include the titles to add as well as those to remove, and the borrower's name is already populated. Select the ones to add, click Add, and then select the ones to remove, and click Remove.

Make an Item Available for Lending

In order to make an item available for lending, you have to [create an Item record](#) for that item because a bar code or some other unique ID in the *Bar Code* field is necessary for lending purposes. The *Bar Code* field is in the Item record.

Mark an Order as Received

Use the following procedure to mark an [order](#) as received. Typically when you do this you also want to create a Catalog record and Item record(s) for each item received, unless the item purchased is not intended to be included in the library's collection.

1. Choose **Orders>Receiving Orders**.
2. On the Order Search page, submit a search for the order that you have received.
3. On the Search Results page, click an **Edit** link for the order received.
4. On the Edit Order page, see the listing of titles for this order at the bottom of the page. If there is more than one title, click the corresponding **Edit** link for the one you received.
5. Click the **Mark Received** button to update the order.
6. If you have made any other changes, click **Save**.
7. Click the **Check Catalog Record(s)** button to see if there is already a Catalog record on file for the item.

Note: **Check Catalog Record(s)** performs a term search on the *CatTitle* and the *Cat/SBN* fields (or *Cat/ISSN*, depending on the type of Order record) so they must match exactly. For example, 0-446-31107-3 will not match 0446311073. If there is the possibility of minor differences in the wording of the title or how a number may have been entered, you may want to search the catalog directly and create the Item record(s) from there instead if a match is ultimately found.

8. If there are Catalog records on file for the item, click the **Select** link for the appropriate record, then click **Close**.
9. If there is no Catalog record for the item or if you want to create an additional Catalog record, click the **Create Catalog Record** button to create a Catalog record for this title.
10. Click the **Create Item Record(s)** button to create Item record(s). One Item record will be created for each copy. You still must [edit each Item record to associate a bar code with it](#) before anyone can check out the item.
11. Optionally—do only if you made changes to this order, click the **Save** button.

Note that an "item" on an order is an entry with a specific vendor item number, which might be the ISBN for a book or the ISSN for a serial. One order item might be for, perhaps, three copies of a particular book. Upon receipt of this *order item*, *three* Item records will be created in the ITEMS textbase, representing the three physical copies, each of which will need to be given a separate bar code.

The following may occur when applicable:

- For a non-Serial record, the *Cat/SBN* field in the Catalog record will be filled in with the contents of the **Item Number** box.
- For a Serial record, the *Cat/ISSN* field in the Catalog record will be filled in with the contents of the **Item Number** box, and the *CatRecordType* field will be filled in with "Serial".
- The number of Item records created is equivalent to the number in the **Number of Copies** box. For example, three Item records will be created if that is the number in the **Number of Copies** box.

Print Bar Code Labels

Use the new Search Items command on the Catalog menu to find the items for which you will print bar code labels. The label report appears on the forms drop-down list, once it has been enabled.

The report uses the Free 3 of 9 bar code font, which can be downloaded from the web, courtesy of Matthew Welch. The label report uses the **Free 3 of 9** font, which must be installed on each computer from which bar code labels will be printed.

To enable the bar code label

A bar code label report for the Items textbase can be found in MyLabels.CONFIG, but is not included in the report list as installed. To activate this report, open MyReports.CONFIG. Look for the ReportList element for the Items textbase. Find the commented-out element <Report Name="BarcodeTriple3x10" ...>. Remove the comment characters and save the file. Before testing, reset the Genie configuration (log into Genie as the admin user, open the Genie About screen, and click **Reset**).

To install the fonts

1. Download the free bar code font from <http://www.squaregear.net/fonts/>.
2. Unzip the downloaded file to your hard drive.
3. Copy the files with a .TTF extension to your **C:\Windows\Fonts** folder.

Label stock

The label report has been designed to work with Avery 5160 address labels or equivalent, on laser sheets 3 labels across by 10 down. However, the report definition may have been modified to use a different label stock.

Claim Missing Issues

To claim missing issues, do the following, in which you must first identify the serial(s) for which you want to do so. Note that you can send e-mail claim notices to suppliers for whom you have e-mail addresses. Printing and mailing claim notices is another option.

1. Choose **Serials>Claim Missing Issues**.
2. On the Serials Search page, notice that the application automatically entered search criteria in the **Issues Missing** box. Click the **Submit Query** button.
3. On the Search Results page, you can send claim notices by e-mail if you select the titles you wish to claim and click the **E-mail** link button. To print claim notices, select the **Print Serials Claim** report from the drop-down list. Choose **File>Print** from the menu bar on your Web browser and proceed as you would normally. If you send e-mail claim notices, a note is automatically added to the serial record with the date the claim was sent. This does not occur if you print claim notices.

Note: You can also print or e-mail claim reports from the [Statistics page](#), but nothing will be added to the records to reflect that this was done.

Print Labels

You use the [InfoCart](#) to print Catalog labels.

Print Multiple Catalog Records

You use the [InfoCart](#) to print multiple Catalog records.

Print Routing Notices

You can print routing notices in a batch or individually on regular paper. In addition, you can print routing notices on label and card stock.

1. Choose **Serials>Route Serials**.
2. On the Serial Search page, notice that the application automatically entered search criteria in the **Issues to be Routed** box. Fill in any additional query criteria if you want to narrow the search, then click the **Submit Query** button.
3. Depending on what you want to do, on the Search Results page:
 - To print a batch of routing notices:
 - a. Select **Print Routing Notices** from the drop-down list. A routing notice report appears.
 - b. Choose **File>Print** from the menu bar on your Web browser and proceed as you would normally with the Print dialog box. The routing notice for each title will print on a separate page.
 - c. After verifying that your report has printed satisfactorily, click the **Mark as Routed** button.
 - To print on label or card stock:
 - a. Select **Print Routing List on Label** from the drop-down list. A list of routing notices appears.
 - b. If necessary, enter a number in the box provided to tell the printer on which label/card to start printing, then click the **Submit** button.
 - c. Choose **File>Print** from the menu bar on your Web browser and proceed as you would normally with the Print dialog box.
 - d. After verifying that your report has printed satisfactorily, click the **Mark as Routed** button.
 - To print an individual routing notice:
 - a. Click the **Edit** link for the serial for which you want to print a routing notice.
 - b. On the Edit Serial Record page, perform whatever activity is needed (for example, check in a serial, edit the names in the **Routing List** box), then click the **Save** button.
 - c. Click the **Print routing notice** link.
(Notice that you can also send the routing notice via e-mail. Click the **Send e-mail routing notice** link.)
 - d. Choose **File>Print** from the menu bar on your Web browser and proceed as you would normally with the Print dialog box.

- e. After verifying that your report has printed satisfactorily, click the **Clear** link on the **Issue Waiting to be Routed** box, then save the record.

You can also print routing notices from the [Statistics page](#).

Note: You may 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 the workstation, and once the software is installed, you will not encounter the message again. Click the **Install** (or **Yes**) button to install the ScriptX software.

Renew a Loan

To renew one or more loans, do the following:

1. Choose **Loans>Renew Items**.
2. On the Loan Renewal page, submit a search for the loan(s) that you want to renew.
3. On the Search Results page, select the check box(es) for the loan(s) that you want to renew. If you want to renew all the loans on the page, click the **Select all** link. Repeat this step for any other Search Results pages.

Tip! Items with a reserve list will have a red asterisk (*).

4. Select a loan renewal term in the drop-down list provided.
5. Click the **Renew selected items** link. Notice that those loans that have been renewed will still appear on the list but with their check boxes disabled until you exit the application.

Renew a Subscription

To renew one or more subscriptions, or to order additional copies of other materials, follow these steps.

1. Choose **Orders>Renew/Reorder**.
2. Enter a query that will find the items you want to reorder.
3. On the report that appears, select the titles you wish to renew. If a title appears more than once (and you determine that this represents subsequent orders for the same item), select the most recent order. Then click **Renew Selected Items**.

The order record for each selected title is duplicated with an updated Order Date, Order Number, and Status. The current date becomes the Order Date, and the Order Number has a ".1" appended. Find these records by searching for today's date in the Order Date field. Edit each record to update other information, such as list price and subscription start, expiration, and renewal dates. You may also want to change the Order Number to reflect your numbering conventions.

Search Online

This topic tells you how to [search](#) online (and includes tips on how to enter search criteria), provides information about [displaying records after a search](#), and contains a [troubleshooting](#) section.

Note: If this topic appears in a window without any controls, you can right-click and use the shortcut menu. For example, the shortcut menu has **Back** and **Print** commands.

Searching

To do a search:

1. (Optional) If available, you can select another search page from the drop-down list in the upper right corner of the current search page.
2. Type search criteria or click the **Browse** button (where available) to select from an indexed list, which contains terms and/or words for which you can search.
3. (Optional) If a drop-down list is provided, select a location (for example, a library branch) from the list to confine your search to a particular location.
4. Click the **Submit Query** button.
Records that meet your criteria are displayed on a Search Results page.
5. (Optional) To change the way records appear, select another display form from the drop-down list if one is provided.

If after entering search criteria and before you submit the search you decide you want to start over (for example, to do a different search), click the **Reset** button to clear the search page.

This topic has tips on finding [words and phrases](#), finding a [date](#), doing "[less than](#)", "[greater than](#)", and "[between](#)" searches, using the [AND-OR-NOT drop-down list](#), finding a [term \(exact, complete match\)](#), and [finding terms that begin with a specific word or phrase](#). It also provides tips on [case and punctuation](#).

Finding words and phrases

Type the word you want to find (for example, `computer`) or type a phrase (for example, `blue harvest moon`) to find those words in that order. To find variations of words, type an asterisk at the end of one or more word stems (for example, `comput* tech*`). Use the symbols **& / !** between words or phrases to represent Boolean AND, OR, NOT. Include a space before and after the symbol. Use the proximity operators **w#** (within) and **p#** (preceding) to find words near each other. See the examples below.

Type this...	To find...
<code>sales meeting</code>	a phrase (those words, in that order)
<code>sales / marketing</code>	either word (or both)
<code>sales & marketing</code>	items that contain both words (items that contain just one of the words will be ignored)
<code>health policy ! medical benefit*</code>	"health policy" but not "medical benefit"
<code>sales p5 market*</code>	"sales" preceding "marketing" by 5 words or fewer. You can include an asterisk at the end of either word. Do not string together phrases (for example, <code>roosevelt p5 white house</code>).
<code>sales w5 marketing</code>	"sales" within 5 words of "marketing" (before or after). Do not include phrases.

Words joined by **& / !** are evaluated in left-to-right order. For example, `red & white / blue` finds items that contain "red" AND "white", OR items that contain "blue". Use parentheses to control evaluation order. For example, `red & (white / blue)` finds index items that contain "red" AND "white" OR "red" AND "blue".

Finding a date

To find a date, use the calendar control (where available) to enter a date. Or manually enter a date in any acceptable format, including, but not limited to, the examples shown here:

`31-Dec-04`

`Dec 31, 2004`

`2004 Dec`

`Dec 04`

`December 2004`

`12-04`

Do not use a forward slash to separate date elements unless you surround the date with quotation marks (for example, `"12/31/2004"`).

You can use the symbols **& / !** between dates to do AND-OR-NOT searches. For example, `May 2005 / June 2005` finds all dates in May or June 2005.

You can do "less than", "greater than", and range searches for dates (see examples below).

Doing "less than", "greater than", and "between" searches

You can search for items greater than or less than a certain value, or within a range. This is most commonly done when searching for dates, but can also be done when searching for values or text. Use the symbols shown below. When used with a partial date, these symbols search from the beginning of the date (first day of the month or year). A range consists of two values, low and high, separated by a colon. Include spaces around the colon.

Symbol	Meaning	Example
<code><</code>	less than (before)	<code>< 2005</code> finds dates before January 1, 2005
<code><=</code>	less than or equal to (on or before)	<code><= 6-15-98</code> finds dates on or before June 15, 1998
<code>></code>	greater than (after)	<code>> 2002</code> finds dates after December 31, 2001
<code>>=</code>	greater than or equal to (on or after)	<code>>= 500</code> finds values greater than or equal to 500
<code>:</code>	between	<code>1997 : 1998</code> finds dates from Jan. 1, 1997 through Dec. 31, 1998 (inclusive) <code>200 : 300</code> finds values between 200 and 300 (inclusive)

Using the AND-OR-NOT drop-down list

Using the AND-OR-NOT drop-down list in front of each box, you can do more advanced searches. The Boolean operator you select for a box determines how the search criteria in that box will be combined with criteria already evaluated. Boxes are evaluated from top to bottom (first box to last).

Finding a term (exact, complete match)

A term is a complete item, with no additional text before or after. To search for a term, precede it with an equal sign (=). For example, `=macintosh apples` finds only that complete term (does not find just "macintosh" or just "apples" or that phrase embedded in other text).

Finding terms that begin with a specific word or phrase

To search for terms that begin with a specific word or phrase, precede the word or phrase with an equal sign (=) and put an asterisk at the end of the search string. For example, to find terms that start with `com` (such as Computer Animation and Commercial Applications), type: `=com*` or to find terms that start with `Computer Graphics`, type `=computer gr*`.

Case and punctuation

Case in query criteria is usually ignored (for example, a search for `genie` finds `Genie`). Punctuation is also ignored, except for the AND-OR-NOT symbols (**& / !**) and search symbols (for example, **: = < >**). If you do not want these characters to be interpreted as search symbols, use quotation marks ("`AT&T`") or replace the punctuation with a space (`AT T`).

Note: For Code fields, punctuation and case are not ignored. Code fields are often used for e-mail fields.

Displaying Records After a Search

A successful search finds one or more records, which are displayed in your Web browser as a report. Use the browser controls as you normally would, to browse, print, and so forth. You can also:

- **Change the report's appearance.** Select a form from the drop-down list on the page, if available.
- **Jump to other locations.** Click links on the report to display more detail or jump to other pages (if available, for example, there may be one or more links to edit a record, show more information about an individual record, or add an item to the InfoCart).
- **Display additional pages.** If available, click the **Next** and **Previous** navigation links on the report page.

Troubleshooting

If you are having trouble with a search, some of the most common problems are listed below. If you do not find an answer to your problem here, see the [error messages file](#), which lists error messages in alphabetical order.

I got the message "Unable to recognize as a correctly formed query."

The program cannot understand the search criteria. Possible problems include:

- Typographical errors

- Mismatched quotes or parentheses
- Extra Boolean search symbols (for example, you should have typed `car / auto` instead of `car / auto /`)
- Missing quotation marks around symbols that can be misinterpreted. For example, search for `"http://www.inmagic.com"`.

If you cannot determine what caused the error, try a simpler search (for example, just a word in a box) to see if it works. If the query page includes a **Browse** button, use it to construct the query, instead of typing criteria. If even simple searches do not work, contact the Webmaster for the site.

I found too many records.

If you used an asterisk, omit it and try an exact search instead (for example, search for `computer technology` instead of `comp*`).

Try using a Boolean symbol (**& / !**) between words to construct more precise queries. For example, to find articles about mythology, not cartoons, search for `hercules ! cartoon`.

If the item you are searching for includes punctuation, substitute spaces for punctuation (for example, search for `shoemaker levy`, not `shoemaker/levy`) or surround the item with quotation marks (`"shoemaker/levy"`).

If you are searching for a date, do not use a forward slash between date components (for example, search for `12-12-98`). Or, you can surround the date with quotation marks (for example, search for `"12/12/98"`).

I did not find any records.

Examine the contents of the search page (especially if it is very long) to verify that you do not have query criteria left over from a previous search.

If you are not sure of the spelling, use an asterisk after the first few characters (for example, `colo*`) or separate several possible spellings with a forward slash (for example, search for `color / colour`).

If you did a complex search, try simplifying it to eliminate confusion. If the query page has **Browse** buttons, use them to select from a list of indexed choices to search.

If you are trying to find records that contain multiple words anywhere in the record, separate the words with Boolean symbols (**& / !**). Otherwise, you are doing a phrase search, which finds these words in that order.

If your search includes Boolean symbols (**& / !**) or range searches (**:**), put spaces around the symbols. Note that this is only necessary if the parameter requiring spaces around operators has been set for your site.

Do not use words (and, or, not) for Boolean operators. You must use the Boolean symbols (**& / !**).

Try using **/** instead of **&** between words. Using **/** means either word can be present (`john / paul` finds John or Paul). Using **&** means both words must be present (`john & paul` will not find just "John" or just "Paul").

Remember that range searches involving partial dates start from the beginning of the range. For example: `<2003` means "before January 1, 2003."

Send a Request for Items to the Library via E-mail

You use the [InfoCart](#) to send a request for Catalog items to the library via e-mail.

Send E-mail Routing Notices

To send e-mail routing notices, do the following. Note that before you can do this, the [e-mail function](#) must already be set up in the application and borrower records must include an e-mail address for each borrower.

1. Choose **Serials>Route Serials**.
2. On the Serial Search page, notice that the application automatically entered search criteria in the **Issues to be Routed** box. Fill in any additional query criteria if you want to narrow the search, then click the **Submit Query** button.
3. On the Search Results page, select the **E-mail Routing Notices** report. Select the periodicals you want to route, then click the **E-mail** link button. When the notices have been sent to the borrowers on each routing list, and the appropriate fields have been updated in the affected records, the results are reported.

Note: You can also send an e-mail routing notice from the edit screen for a specific serial, or send bulk e-mail routing notices from the [Statistics page](#). The Statistics page does not update the records, however.

Send an Overdue Notice for an Individual Item

To send an overdue notice for an individual item, do the following. Note that the [e-mail function](#) must already be set up in the application and borrower records must include an e-mail address for each borrower. You can also send [batch overdue loan notices](#).

1. Choose **Loans>Search Loans**.
2. On the Loan Search page, submit a search with the search criteria to find the specific overdue loan (for example, enter the title of the overdue item).
Note: Do not select the **Overdue loans only** check box. This check box leads to the [batch overdue loan function](#).
3. On the Search Results page, click the **Edit** link for the overdue loan for which you want to send an e-mail notice.
4. On the Edit Loan Record page, click the **Send overdue e-mail notice** link.
5. Fill in the boxes on the Overdue E-mail Form pop-up window, making sure that you fill in the required boxes. You can also type a message in the **Comments** box.
6. Click the **Send** button. The application uses the standard predesigned overdue loans notice e-mail form plus any text you typed in the **Comments** box for this recipient.
7. When you return to the Edit Loan Record page, notice that the software automatically entered text in the **Loan Notes** box noting when an e-mail overdue notice was sent.
8. Click the **Save** button.

Send Batch Notices Via E-mail

To send batch notices via e-mail for overdue loans, do the following. Note that the [e-mail function](#) must already be set up in the application and borrower records must include an e-mail address for each borrower.

1. Choose **Loans>Search Loans**.
2. On the Loan Search page, select the **Overdue loans only** check box to fill in appropriate search criteria for finding overdue loans. If you want, enter one or more borrower names or modify the date criteria (for example, <@DATE - 7 will find loans at least a week overdue). Then click the **Submit Query** button.
3. On the Overdue Notices page, click the **Select All** button to select all the check boxes for the overdue loans listed. You can select individual overdue loans instead.
4. Click the **Send** button. The application uses the standard predesigned overdue loans notice e-mail form for all recipients.

Notice on the Overdue Notices page that after the e-mail has been sent, a status message reports how many overdue notices were sent to how many borrowers. Each borrower will receive one e-mail containing information about all of his or her overdue loans.

Note: You can also send e-mail overdue notices from the [Statistics page](#). Different e-mail messages can be sent dependent on how overdue the loans are.

Send Multiple Catalog Records via E-mail

You use the [InfoCart](#) to send multiple Catalog records via e-mail.

Set Up an Arrival Pattern

To set up an arrival pattern, do the following. Before you can set up an arrival pattern for a serial, you must first search for the appropriate serial.

1. Choose **Serials>Search Serials**.
2. On the Serials Search page, submit a query with search criteria to retrieve the serial for which you want to set up an arrival pattern.
3. On the Search Results page, click the **Full Display** link.
4. On the Search Results Full Display Format page, click the **Set Up Arrival Pattern** link.
5. On the Set Up Serial Arrival Pattern page:
 - Notice that the Start Date, Frequency, and Issues per Volume may automatically be filled in. Note that while the duration is automatically set to 12 months (1 year), you can manually change the number.
 - a. Enter or change the start date and frequency information in the boxes provided, if necessary.
 - b. Change the subscription duration for the arrival pattern in the box provided, if necessary.

- c. If your library administrator set it up so that volume and issue information is appended to an issue date, fill in the **Starting Volume**, **Starting Issue**, and **Issues per Volume** boxes.
 - d. Click the **Generate Dates** button and let the application generate the dates for the expected issues in the box provided.
 - e. Verify the issues expected dates and delete or change a date, as appropriate.
- Optionally, enter a value in the **Routing List** box (use the **Browse** link provided) as necessary.
6. Click the **Save** button.

Tip! If you have multiple subscriptions for this title, you can set up the arrival pattern for one, then use the **Duplicate** button, if present, to make copies of the record, changing any routing list information for each copy.

Set Up the E-mail Function

To set up the e-mail function, do the following:

1. Choose **Other>Set Up E-mail Information**.
2. On the Set Up E-mail Information page, fill in at least the required boxes. Note the following:
 - Filling in your library name provides that information on the various reports in the *Genie* application (for example, the Routing List notice).
 - Filling in an e-mail address means that the application will insert it for you where necessary, for example, as the return e-mail address on e-mail messages that you send through the *Genie* application and as the To addressee for the Request function in the InfoCart.
 - Filling in a mail server name enables the e-mail function and makes the e-mail links appear where available in the application (for example the **Send e-mail routing notice** link on the Edit Serial Record page).
3. Click the **Save** button.

Tip! After setting up the e-mail function, test it to be sure it is working as expected. For example, [use the InfoCart](#) to send yourself an e-mail request.

Upload BookWhere XML

If you have either a copy of BookWhere *for Windows*, or a subscription to BookWhere *Online*, you can search for bibliographic data, download it to a file on your local machine in XML format, then upload it to a folder on the *Genie* server where it can be imported into the *Genie* Catalog textbase.

The CS/*Importer* must be set up with a profile that processes files copied into that folder. See the Inmagic *Genie* v3.00 Technical Notes for the appropriate settings to use for the CS/*Importer*.

Go to www.webclarity.info for more information about the BookWhere products.

Upload a File for a Catalog Record

Note: This functionality may not be set up for every *Genie* site. In addition, whether you can upload a document and/or image file depends on how your site has set up this functionality.

For a Catalog record, you can include a document file and/or an image file. For a document file (for example, the table of contents for a book), you can link to the original document (and therefore be able to view the file) and/or use the *CS/Importer* (if you have it installed) to import the full text of the document to enable searching of the text. For an image file, you can only link to the original image file. You use this functionality through the Biblio 2 tab on the Add/Edit Catalog Record page. You can see the results of this functionality on the Biblio 2 tab on the Edit Catalog Record page and the Full Display page.

1. Add a new Catalog record or edit a current record. Be sure to fill in the **Title** box on the Biblio 1 tab before you go to the next step.
2. Select the file you want to upload through the Biblio 2 tab. Click the **Upload** link under **Document File Name** and/or **Image File Name**, if available.

Notes:

- You can only upload documents for new records if the ability to extract text has been disabled. The **Document File Name** section will only appear when editing existing records if text extraction is supported.
 - Once a document image file has been successfully included with a Catalog record, you cannot include it again with any other Catalog record.
 - You cannot upload an image if a file with that name already exists in the location specified for images.
3. On the File Upload window, optionally select the **Extract Text** check box if you want to use the *CS/Importer* to import the full text of the document file. Note that this check box may be omitted for sites that choose not to use the *CS/Importer*.
 4. Click **Upload Selected File**. This will upload the file to the server, close the File Upload window, and return you to the Add/Edit Catalog Record page.

In the **Document File Name** box, the file name appears as a link. The path is removed so that only the file name is retained in the record. The same is true for the **Image File Name** section.

Note: If your site uses the *CS/Importer* to import the full text of the document file, the document link on the Add/Edit Catalog Record and Full Display pages will not launch the document until the import process is completed. (Your site's configuration of the *CS/Importer* determines the processing time.)

Use the InfoCart

You can use the InfoCart to send a request for items to the library via e-mail and send multiple Catalog records via e-mail, download multiple Catalog records in a .CSV (Comma-Separated Values) or as an XML (eXtensible Markup Language) formatted file, print book labels, and print multiple Catalog items. Note that the *Genie* application can be configured to omit or rename some of these options by your library administrator. The [e-mail function](#) must already be configured in the application before you can send e-mail.

1. Choose **Cataloging>Search Catalog**.

2. Enter your search criteria on the appropriate search page, then click the **Submit Query** button.
3. For each item you want to add to the Cart, click the corresponding **Add to Cart** link, or click the **Add all to Cart** link if you want to select all the items on the page. If necessary, repeat this step if there is more than one Search Results page.
4. Do another search and add more items to the InfoCart as needed. Information in the Cart will persist until you close the Web browser window.
5. When you are done adding to the Cart, click the **# item(s) in Cart** link in the navigation bar (which appears under the Cataloging menu).
6. On the InfoCart page, select an action item from the drop-down list, then click the **Go** button. Notice, for example, that there may be more than one choice for the type of label you can print.
7. Depending on the action you selected, do whichever is applicable:
 - If **sending e-mail**, enter the appropriate e-mail address(es), subject line (if available), and optional message text, then click the **Send** button.
 - If **downloading Catalog information**, you can either:
 - Open the file, if possible, to display it on your machine, or
 - Save the file locally.
 - If **printing labels**:
 - If necessary, enter a number in the box provided to tell the printer on which label to start printing. Printing starts from top to bottom, left to right. A value of 1 (the default) starts the printing on the first (leftmost) label on the first row of labels. When printing is completed on the first row, it continues printing on the leftmost label on the second row, and so forth. If you enter a value, click the **Submit** button to set the label on which to start printing.
 - Choose **File>Print** from the menu bar on your Web browser and proceed as you would normally with the Print dialog box.

Note: You may 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 the workstation, and once the software is installed, you will not encounter the message again. Click the **Install** (or **Yes**) button to install the ScriptX software.

- If **printing Catalog information**, once the information displays on a page for you to print, use the print function for your Web browser to print the page (for example, choose **File>Print**).

Notice that you can remove an item from the Cart by clicking the corresponding **Remove from Cart** link. To remove all items from the Cart, click the **Empty Cart** button (when available). Note also that when you end your current Internet Explorer session, your Cart is automatically emptied.

View Statistics

Select **Statistics** from the **Other** menu in *Genie*. This will bring up a screen containing a number of individual statistics, such as number of overdue loans, active reserves, etc. There are also links to view the items described, and, if appropriate, send e-mail to suppliers regarding overdue serial issues, or send e-mail loan overdue notices or serial routing notices to borrowers.

About the Help File

After upgrading to a new version of the *Genie* application, clear the temporary files/cache on your Web browser to make sure that you are looking at the latest copy of the help file.

Copyright (c) 2005-2012, Inmagic, Woburn, MA 01801.

Documentation/Contact Information

Other Documentation

You received electronic copies of the *Genie* documentation set when you installed the product. You will find them in the Documentation subfolder of the main *Genie* installation folder. In addition, you can access the documentation set through the Inmagic [Customer Extranet](#).

Contacting Inmagic

For assistance, contact Inmagic, or your local Inmagic dealer. You can also communicate with other Inmagic users through a [forum](#).

If you have a maintenance agreement, please have your customer ID handy, and try to be at your computer when you call. If that is not possible, note exactly what you were doing when you encountered the problem, the exact text of any error messages you received, and your software version and serial number. (For the *Genie* serial number, click the **About Genie** link on the *Genie* navigation bar. For the *Content Server* serial number, open CS/TextWorks and choose **Help>About CS/TextWorks**.)

If you do not have a maintenance agreement, you can contact Inmagic Customer Service to purchase one.

Inmagic
600 Unicorn Park Drive, Fourth Floor
Woburn, MA 01801 U.S.A.
Tel: 781-938-4444 or 800-229-8398
Fax: 781-938-4446

<http://www.inmagic.com>

support@inmagic.com	- technical support questions
CustomerSvc@inmagic.com	- general company, product, and services questions
sales@inmagic.com	- sales, product pricing, and custom solution questions
wishlist@inmagic.com	- feature requests

If your message is intended for a particular person at Inmagic (for example, a Technical Support representative who is expecting your message or files), please include the name of that person in the subject and the message.

Communicating with Other Users

You can participate in user-to-user discussions through an Inmagic forum on the Web. Note that the forums are not an official customer or technical support channel for Inmagic products. To participate in a forum, go to the Inmagic [Customer Extranet](#).

Index

A

- add to validation list manually20
- arrival pattern20

B

- bar code..... 4, 7, 8, 9, 11
- batch overdue notices20, 24
- BookWhere22
- borrower information4

C

- Cart..... 8, 12, 18, 20, 23
- Catalog records..... 5, 9, 12, 20, 23
- check Catalog records9
- check in.....3, 4
- check out4
- Claim reports11
- create
 - Catalog record5
 - Serial record6
 - Order record6
 - Item record.....7
 - Item record.....9
 - Catalog record9
- CS/Importer22
- CSV file.....23

D

- documentation27
- download multiple Catalog records8, 23

E

- e-mail..... 18, 19, 20, 21, 23, 24

F

- forums.....27

H

- help file27

I

- import full text22
- individual overdue notice.....19
- InfoCart..... 8, 12, 18, 20, 23
- Inmagic27
- item
 - check in4
 - check out4
 - create Item record.....7
 - create Item record.....9

- Item records7, 8, 9

L

- labels12, 23
- lending9, 13
- loan13

M

- maintenance agreement.....27
- mark an order as received..... 9
- multiple Catalog records.....20, 23

O

- online searching14
- order6, 9
- overdue notices
 - individual19
 - batch20

P

- print
 - bar code labels.....11
 - Claim reports.....11
 - multiple catalog records11
 - labels12
 - multiple catalog records12
 - routing notices.....12
 - multiple catalog records23
 - labels23

R

- receive an order 9
- renew a loan13
- request items.....18, 23
- reserve list.....3, 4
- routing notices.....12, 18, 24

S

- ScriptX software23
- search online.....14
- send multiple Catalog records via e-mail .20, 23
- serial18
- serial number27
- Serial record..... 6
- set up an arrival pattern.....20
- statistics25

T

- technical support27

U	
upload a file for a Catalog record	22
V	
validation list, add to manually	20
view file	22

W	
waiting list	3
X	
XML file	23