G4 Group Promotion

For school educational libraries of one or many Campus locations.

Settings Verification

Promote ALL Groups - One Click

Transfer Group from other Campus

Purge Group Members

1

What is Group Promotion?

- This is the simple process of manually moving Groups/Grades up one level as they progress yearly.

  ✓ The library system provides a means to perform promotion of student groups with one-click of a mouse.

  ✓ Multi-campus libraries that are hosted On-line by LRMS also have the ability to easily transfer student promoted Groups from one campus to another with a simple click of a mouse. Those libraries **no longer need to export and import student data** from one place to another.

  ✓ The example used in this presentation will be a High School/Middle School, you can use these instructions and apply them to your library as the principle is the same for an Elementary, Intermediate, Junior High or a PK – 12 Library.

Multi-library Promotion

This instruction will help multiple campus libraries to receive a Group of borrowers that are to be transferred to your campus. Also, it is important to promote all campuses prior to performing Group transfers between campuses.

Tips to set-up before proceeding:

1. Have a promote to Group that represents the same Group designation (04) where these Borrowers/students will transfer to (example: your 04 Group will become the 05 when transferred to the next campus. So 05 is your promote to Group within the G4 Manage Groups screen/display.
2. Always be sure your promote to Group is empty, before starting.
3. LRMS as a service has taken extreme care to setup the Transfer From data location to allow for a successful Transfer of your new incoming Group from the correct Campus where your new borrowers are coming from.
4. Group codes should not be changed once set-up has been accomplished, contact LRMS if there is need to change Group designator's.

How to Use the Group Promotion process

1. Begin with accessing the Borrower Management Menu
2. Select Search/Edit/Promote Groups
3. Verify that the sequence used to promote groups up one level is correct, this only needs to be done once. (see page 5)
4. Be sure the highest promote too Group is Empty before using the Promote ALL Groups – One Click. (Example Grade/Group 12 promotes to Group 13, be sure Group 13 has no borrowers within it from a prior year.
5. To empty a Group use the Purge Group Members option
6. View a brief video presentation in slide show to see the animations that demonstrate the process of promotion verification.

Promote Order Verification.

Group	Circ Calendar	Calendar Last Day	Circ Limit	Circ Display Rows	Promote Group To	Promote Order	Transfer from DB Name	Borrowers	First Circ Trans
08	LHS	05/30/2014	2	3				1	12/11/2
09	LHS	05/30/2014	8	10	10	4	Leonard_JH	63	01/30/2
10	LHS	05/30/2014	8	10	11	3		71	08/21/2
11	LHS	05/30/2014	8	10	12	2		84	09/12/2
12	LHS	05/30/2014	8	10	13	1		80	01/31/2
13	LHS	05/30/2014	0	3				0	
8	LHS	05/30/2014	2	3				16	11/01/2
99	DEFAULT	05/30/2014	10	3				0	10/11/2
FC	LHS	05/30/2014	125	35				87	01/11/2

Verify that the Sequence order of promotion is correct, promotion begins with the highest grade to the lowest, in this example 12 will transfer to 13 and 13 must be empty prior to the promotion.

The promote order receives a 1; being the first to move up.
Review:
1 = 12 to 13, 2 = 11 to 12, 3 = 10 to 11 and 4 = 09 to 10 and the new 08 or 8th. Graders are coming from the JH campus Group shown as 09 at the JH library program.

Once this sequence has been verified or setup properly, select the Action menu

Play Audio/Video

Want to purge a Group of Borrowers?

Purge/Delete Borrowers

Removing Borrowers from the Promote to Group:

1. If the prior years borrowers are located within the "Promote To Group" use the "Purge Group Members" option found within the "Action" menu to remove these borrowers.
2. When promoting borrower groups always plan to move all members to the next group level, any borrower that is to be retained one grade should be edited by changing their Group level back to the proper group.
3. When borrowers are moved to a "Promote to Group"; it is always a good procedure to Purge this Group after promotions and transfers have been successfully completed. Purging will also prevent borrower group merging.

Need more assistance?

Contact Support:

Customer Support – Call: 877-700-5767

E-mail: support@lrms.com