

# Library Resource Management Systems, Inc.

## Manually Promoting Borrowers:

From the BackOffice Menu

### Select Borrower Management - Search/Edit Groups

Why use "Transfer" Groups from one level to another, because it is simple, fast and logical. G4 does have other options for promoting Groups; if you are comfortable using those methods please continue.

LRMS(Build 3.8.17) : DEMO (User: lrms ) (Server: (local) ) - [Manage Groups]

File Action Previous Menu Main Menu

Display Active Statistics (will slow display)

Group	Circ Calendar	Calendar Last Day	Circ Limit	Promote Group To	Promote Order	Transfer Group from other Campus	Borrowers
01	DEFAULT	06/01/2024	6	02	12		1
02	DEFAULT	06/01/2024	6	03	11		132
03	DEFAULT	06/01/2024	6	04	10		37
04	DEFAULT	06/01/2024	6	05	9		71
05	DEFAULT	06/01/2024	6	06	8		261
06	DEFAULT	06/01/2024	6	07	7		275
07	DEFAULT	06/01/2024	6	08	6		
08	DEFAULT	06/01/2024	6	09	5		
09	DEFAULT	06/01/2024	6	10	4		
10	DEFAULT	06/01/2024	6	11	3		
11	DEFAULT	06/01/2024	6	12	2		
12	DEFAULT	06/01/2024	6	13 - Grads	1		
13 - Grads	DEFAULT	06/01/2024	0				
FC	DEFAULT	06/01/2024	400				
KG	DEFAULT	06/01/2024	2	01	13		
PK	DEFAULT	06/01/2024	2	KG	14		

Select Search/Edit Groups

Be sure that the Promote Order is set-up properly

## Here we make our selection:

LRMS(Build 3.8.17) : DEMO (User: lrms ) (Server: (local) ) - [Manage Groups]

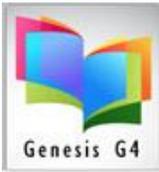
File Action Previous Menu Main Menu

- Add New
- Remove Group Members and Definition
- Set Group Calendar
- Set Group Circulation Limit
- Set Limit Circulation Detail Rows to Display
- Set Promotion Group
- Set Promotion Sequence
- Set Promotion Transfer Group from Other Campus
- Manually Promote One Group Only
- Promote ALL Groups up one level [one click]
- Transfer Group From Other Campus
- Purge Group Members
- OD Notices Toggle Auto Send Email
- OD Notices Set Days
- OD Toggle Auto Restrict Account

Ctrl+Ins  
Ctrl+D  
Ctrl+C  
Ctrl+G  
Ctrl+S

	Promote Order	Transfer Group from other Campus
02	12	
03	11	
04	10	
05	9	
06	8	
07	7	
08	6	
09	5	
10	4	
11	3	
12	2	
13 - Grads	1	
01	13	
KG	14	

These are the promotion options, use is dependent on your library configuration.



# Library Resource Management Systems, Inc.

## Manually Promote One Group Only:

Group	Circ Calendar
01	DEFAULT
02	DEFAULT
03	DEFAULT
04	DEFAULT
05	DEFAULT
06	DEFAULT
07	DEFAULT
08	DEFAULT
09	DEFAULT
10	DEFAULT
11	DEFAULT
12	DEFAULT
13 - Grads	DEFAULT
FC	DEFAULT
KG	DEFAULT
PK	DEFAULT

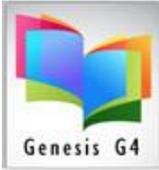
- This example begins with transferring Group 12 to the highest Group 13-Grads for a K-12 school library, School Districts having multiple libraries will have a similar pattern but with less Groups/Grades. These other libraries will pick and choose what transfers to where.
  - Transferred Groups; the Individuals within each group along with their Circulation information will move using Transfer.
  - Example: Groups/Grades Pre-K through 12 will start with a Transfer from Group 12 to 13; other examples Pre-K to 04 would have a 05 Group created, 06 to 08 would have a 09 Group for this function.
  - (Create a new group/grade, if necessary, by using the "Action" menu "Add New". The Groups data can then be used for transferring this Group to another library.
  - Transfer Group from Other Campus is used by the receiving library of the graduating group from the other campus library.
- **Repeat this process** Group by Group working your way from the highest group number to the lowest; usually letter description groups like until K or Pre-K are last to be promoted as K will transfer to 01 and Pre-K will transfer to K.

## Promote All Groups up one Level (One Click)

- To use this option requires the Promote Order is present and set-up properly.

Group	Circ Calendar	Calendar Last Day	Circ Limit	Promote Group To	Promote Order	Transfer Group from other Campus	Borrowers
01	DEFAULT	06/01/2024	6	02	12		1
02	DEFAULT	06/01/2024	6	03	11		107
03	DEFAULT	06/01/2024	6	04	10		92
04	DEFAULT	06/01/2024	6	05	9		107
05	DEFAULT	06/01/2024	6	06	8		141
06	DEFAULT	06/01/2024	6	07	7		132
07	DEFAULT	06/01/2024	6	08	6		37
08	DEFAULT	06/01/2024	6	09	5		71
09	DEFAULT	06/01/2024	6	10	4		261
10	DEFAULT	06/01/2024	6	11	3		275
11	DEFAULT	06/01/2024	6	12	2		
12	DEFAULT	06/01/2024	6	13 - Grads	1		
13 - Grads	DEFAULT	06/01/2024	0				
FC	DEFAULT	06/01/2024	400				
KG	DEFAULT	06/01/2024	2	01	13		
PK	DEFAULT	06/01/2024	2	KG	14		

Be sure that the Promote Order is set-up properly



# Library Resource Management Systems, Inc.

- Using Promote All Groups up one Level (One Click) is the best and fastest option to use. This only takes a few seconds to move All Groups up one level (Providing the Promote order is setup correctly).
  - Using this option does require that Grads Group be empty, if not empty the program will warn and ask permission to remove any existing members.

**Transfer Group from Other Campus** *(only start this transfer after the sending campus has promoted their students up one Grade/Group level.)*

- This option is used to move Graduating students from one Campus Library to their New Campus Library.

Group	Circ Calendar	Calendar Last Day	Circ Limit	Promote Group To	Promote Order	Transfer Group from other Campus	Borrowers
06	DEFAULT	05/27/2022	0	07	7	Grove_EI	79
07	DEFAULT	05/27/2022	6	08	8		64
08	DEFAULT	05/27/2022	6		5		67
09	DEFAULT	05/27/2022	6		10		74
10	DEFAULT	05/27/2022	6		11		74
11					12		63
12					13		47
13							0
FC							107

## Purge Group Members:

Simple method to remove members from a Group.

Group	Circ Calendar	Calendar Last Day	Circ Limit	Promote Group To	Promote Order	Borrowers
12	DEFAULT	05/27/2022	6	13	1	63
13	DEFAULT	05/27/2022	0			47
FC	DEFAULT	05/27/2022	200			107