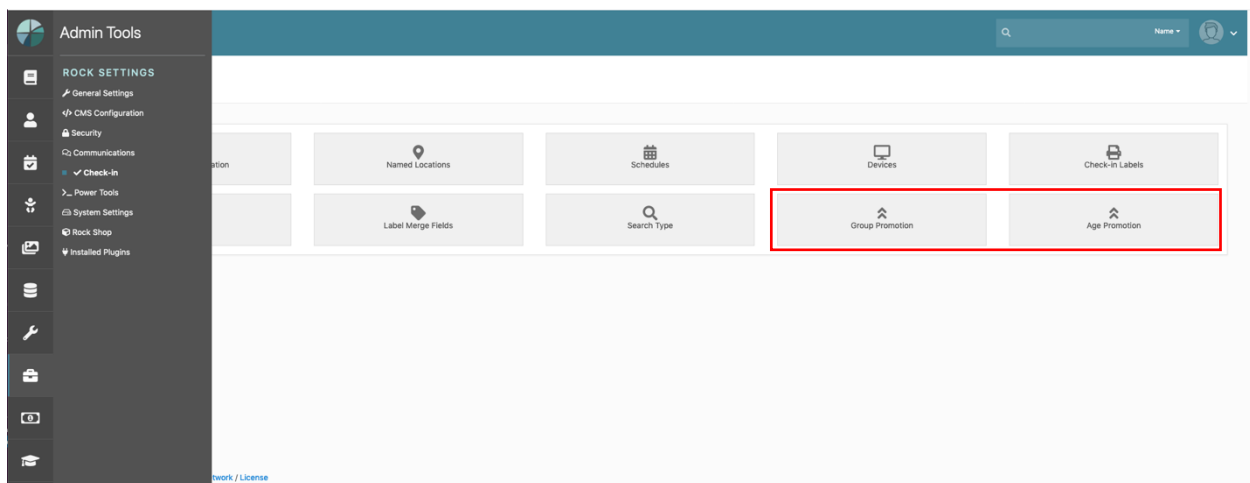# BEMA Promotion Plug-In

Introduction

The BEMA Promotion Plug-In is used along with an "Already Belongs" Rock check-in to allow the promoting of kids from one group to another. It replaces the tedious process of moving kids between groups in order to accomplish the promotion of kids each year. (The other styles of Check-In in Rock are "Criteria Based" or "Data View" and usually don't need this type of group-to-group promotion.) The plug-in allows Group Attributes to control the process of promoting from one group to the next and handles the sequencing of the process.

The plug-in consists of two Rock blocks that are added to pages under Admin Tools -> Check-In menu.

Group Promotion goes from one specific group to another. Each group's members are placed in a destination group. Group members can then be marked inactive in the old group or deleted from the old group.

The second block, Age Promotion, uses a starting and ending birthdate attribute on each group to move kids between groups according to their birthdate. This allows kids from one group to be placed in multiple destination groups according to age.

Set Up

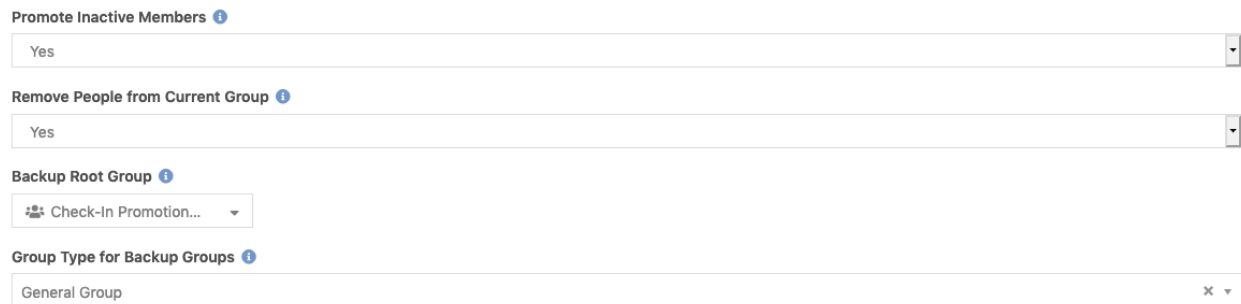- *The Crossing – Setup is already completed on your site.*

The Plug-In should be installed from the Rock Shop. Once installed, it will automatically create the needed pages and add the required attributes to the Check-In Group Type.

Block Settings

- *The Crossing – Block settings are already set on your site. It will remove people from old groups, move inactive as well as active people and Age Promotion will match the prefix on the names to keep service hour groups aligned.*

There are a number of block settings on the Promotion blocks to control the behavior of the block. These settings should be reviewed after installation and prior to use in order to make sure the block behaves as desired. Settings allow limiting the group types used on the block, changing columns displayed and other page characteristics. These are similar to other group blocks in Rock. The defaults are set to the most common options, however the backup options on the Promotion blocks must always be set to enable backups as a part of the promotion process.

There are four settings specific to Promotion.

Promote Inactive Members ⓘ

Yes	▾

Remove People from Current Group ⓘ

Yes	▾

Backup Root Group ⓘ

👥 Check-In Promotion...	▾

Group Type for Backup Groups ⓘ

General Group	× ▾

Promote Inactive Members

> This setting controls if inactive members should be moved to the new groups or not. Normally it is recommended that those members be moved to the new group along with active members. They will remain inactive in the new group and this avoids the youngest aged groups continuing to grow larger in subsequent promotions.

Remove People from Current Group

> This setting controls whether members are removed from the old group or just inactivated in the old groups. Normally members would be removed from the old group as part of the process. Note that group types with Group History enabled do not allow group members to be removed. Rather, those group members must be Archived. The block will Archive instead of remove if Group History is enabled on a group type in the promotion.

Backup Root Group

This is the parent group in the group tree structure under which backup groups will be created. It is required in order for the backup option to be shown.

Backup Group Type

This Group Type will be used in creating backup groups. It SHOULD NOT BE a check-in group type. If it is a check-in group type, then it will create additional options in your check-in configuration which is not desired (it creates a confusing mess). A non-check-in group type such as "General Group" should be used.

The Age Promotion block has two additional settings for Promotion. Some churches use different groups for different services (or other things like campuses). The Age Promotion block allows for a name prefix to be considered in the process to promote from "like" group names to a "like" destination names. For example, if you have group names like "8:00 Infants", "9:30 Infants", and "11:00 Infants", you can indicate that in resynchronizing to ages the first 5 characters of the name must match between the old group and the new group.

Match Similar Named Groups ⓘ

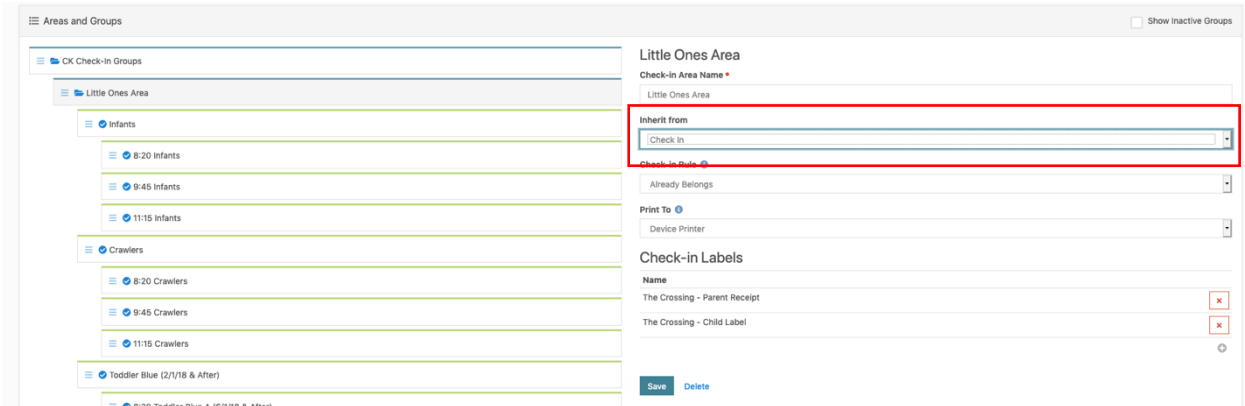| Yes	▾

Number of Characters to Match ⓘ

5

These two settings control if names are matched and how many characters (starting at the beginning of the name) must match in order to promote members.
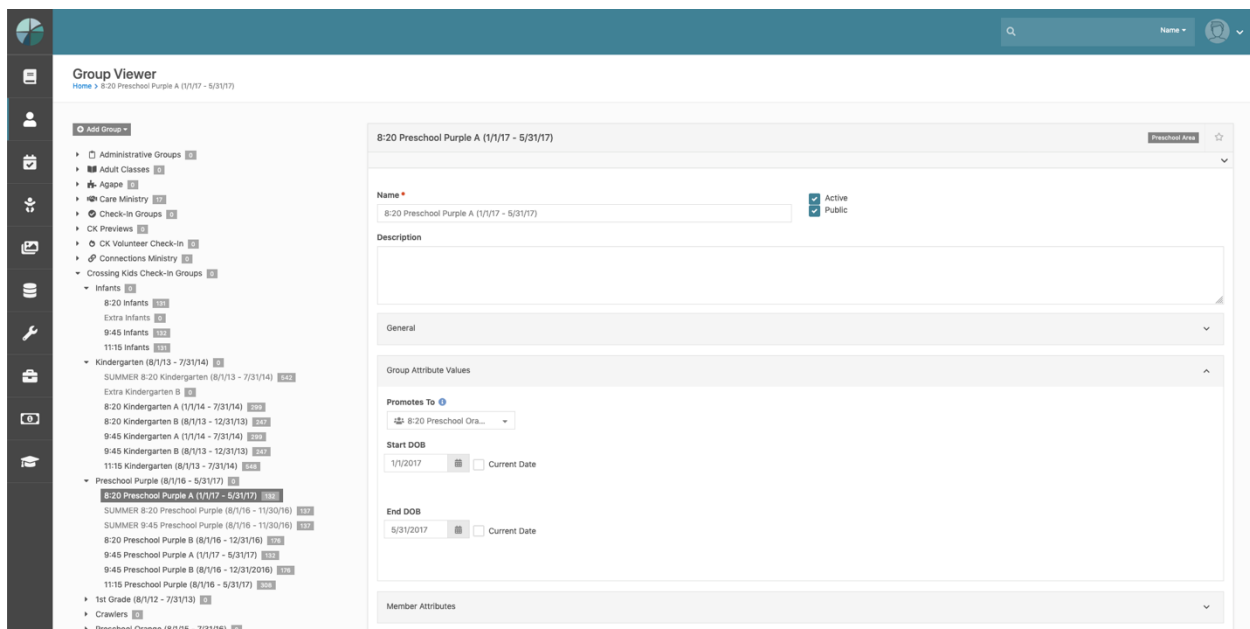
Getting Started

Before these pages can be used, the attributes must be set on the check-in groups themselves. If you navigate to either the Group Promotion or Age Promotion page without any group attributes set, the group lists will be blank because it does not find any groups eligible for promotion. Attributes are set on the groups using Rocks normal Group Viewer by editing the group.

The Check-In Areas should be set to Inherit From one of the four Rock Check-In Group Types (Check-In, Check-In By Ability Level, Check-In By Age, Check-In By Grade). Any of those types will inherit the Promotion Attributes.

The group attributes are set through the normal Rock Group Viewer. There are three attributes added by the plug-in to the Check-In Group Type.

(Note that we assume the groups are visible in the group viewer in order to add members to those Already Belongs groups. If not, they can be made visible in the Group Viewer by going to Admin Tools -> General Settings -> Group Types and setting the checkbox for "Show in Navigation" under Display Settings.)

The three attributes added are "Promotes To" (which is a Group attribute), "Start DOB" and "End DOB" (which are Date attributes).

"Promotes To" is used by the Group Promotion. It specifies a group that all of the members will be moved to during the process.

"Start DOB" and "End DOB" are used by the Age Promotion to move members among the groups according to their age. This allows the age ranges to be changed so that they do not necessarily line up with the previous age ranges and the group members will be re-sync'd in the new groups according to their actual age.

If both of these methods are being used together to promote group members, the older aged groups should be done first so that younger ages are not promoted twice.

The process begins by setting the attributes on the groups.

Promotion Process

1) Setting Attributes

- *The Crossing – The initial assigning of attributes for Group and Age Promotion have already been set. Age Promotion attributes in particular will need to be updated for every Age Promotion because they will likely change each year to shift the start/end birthdates.*

   If promoting from one check-in group to another where all members move to the new group, it is only necessary to set the "Promotes To" attribute on each group to indicate where members should end up in the new group. ("Start DOB" and "End DOB" are not used for Group Promotion.)

   This process can be a little tedious depending on the number of groups, but these only need to be set the first year and then can be repeatedly used in subsequent promotions.

   The last group in the promotion sequence may well promote out of the check-in groups. While it may not be necessary for other uses, it is recommended that a group be created to hold the last group being promoted. For example, if check-in is only used through 5th grade, it is recommended that the 5th grade group's "Promotes To" value be set to a group as well (let's say a 6th Grade Dump Group for example). This ensures that the 5th grade group only contains active 5th graders and last year's 5th graders are removed from the group. It also enables the Undo feature to pull members back into the 5th grade group in the event an Undo is needed. That final group can be of any type. It does not need to be a check-in group, so creating a General Group for that purpose is fine.

   Once all of the attributes are set, navigate to Admin Tools -> Check-In -> Group Promotion.
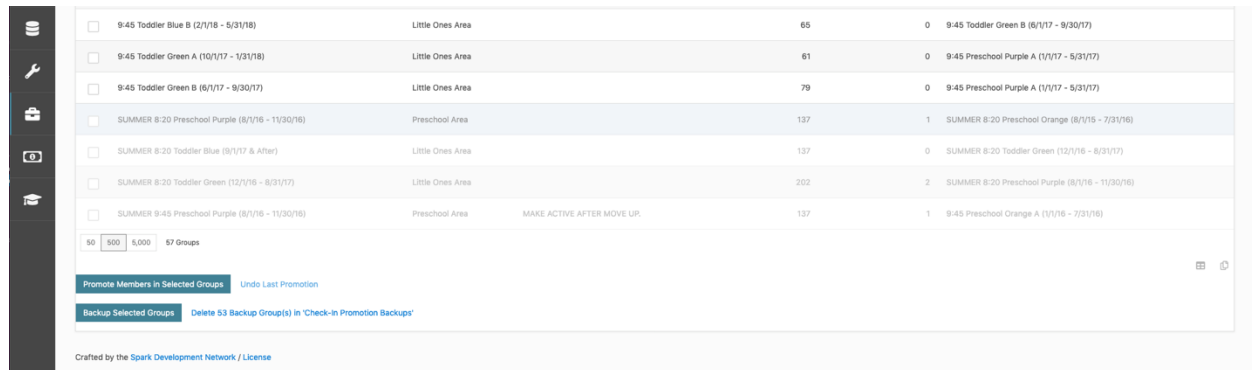
The list should show all groups that have the Promotes To attribute set. Use this list to double check and verify that all of the groups are set to promote to the proper new group. If groups are missing from the list, you will need to add the Promotes To attribute using the Group Viewer. If an item on the list is incorrect, you can click on the item to edit it.

2) **Backing Up**

The Promotion Plug-In supports backing up the groups prior to the promotion process. For these options to appear, the Backup Root Group and the Group Type for Backup Groups must be set in the Block Settings.

The Backup Selected Groups button is at the bottom of the block. If there are existing groups under the Backup Root Group the Delete XX Backup Groups in 'XXX' option will be present as well. If not the Delete XX Backup Groups in 'XXX' option will be greyed out.

Normally old backup groups should be deleted before a new backup is done to make sure that the groups match the current membership (if the same group already exists the resulting group will contain old and new members).

a) Delete any old backup groups.
b) Then select the groups in the list that will be promoted. The top checkbox can be used to Select All.
c) Click "Backup Selected Groups."

This will create a copy of the groups under the configured root group with the group type chosen on the block setting. It is not intended that this backup be used and is not required for the promotion process. However, it gives you a copy of the starting point in the event of a problem with the promotion. There is also an Undo option that would be the first method to recover if there are issues. Using these backups would require using the normal Rock Bulk Update to put members back into their original groups.

3) **Promotion by Group**

a) Select the groups from the list to be promoted. The top checkbox can be used to Select All.
b) Click "Promote Members in Selected Groups."

This will begin the process of promoting members. The plug-in will use two additional group member attributes to track which group a member is being promoted to and which group a member was promoted from (for undo purposes). These attributes are used by the process and do not need to be manually entered or edited.

This process can take a while depending on the number of group members being moved. It normally takes about 3 minutes per 500 group members depending on the speed of the server.

During the process, status messages will be displayed. *PLEASE leave the screen visible and do not navigate away from the page until the process completes.* While the promotion process will continue to run, there will be no way to navigate back to check on the status. The screen will be updated every 10 - 15 seconds during the process.

3b) Promotion by Age

Alternatively, there is a block to resynchronize group members to check-in groups according to their age. It is also under Admin Tools -> Check-In called Age Promotion.

This process uses the "Start DOB" and "End DOB" attributes in the process of promotion.

There are several key things to note about this process.

- Only members in the selected groups will be resynchronized according to their birthdate. The process does not look at all people in the database, only group members in selected groups.
- Start DOB and End DOB are required for the process on all groups. Only specifying one does not provide sufficient information for the process.
- The Start DOB and End DOB should not overlap. If they do overlap, the process will select the first matching group for promotion and the second will be ignored.
- Name prefix matching can be used to keep promotion within a set of groups. See Block Settings for more information on name matching for Age Promotion.
- Group members may stay in the same group, be promoted up or down in the process and can skip groups. The process is purely based on birth date.
- Age Promotion attributes will most likely need to be set every time they are used. Any absolute dates will need to be updated for the current year even if the month and day remain the same.

Absolute vs. Relative Dates

This plug-in supports the use of both absolute dates (like 12/1/2016) or relative dates (like Current Day minus 365). When using relative dates, be sure the Start DOB is prior to the End DOB. For example, if the group is for the anyone born in the last 6 months, Start DOB would be Current Date – 183 and End DOB would be Current Date +- 0.

The following shows the usage of absolute dates.

To promote by age:

a) Select the groups from the list to be promoted. The top checkbox can be used to Select All.

b) Click "Promote Members in Selected Groups."

This will begin the process of promoting members. The plug-in will use two additional group member attributes to track which group a member is being promoted to and which group a member was promoted from (for undo purposes).

This process can take a while depending on the number of group members to move. It is normally about 3 minutes per 500 group members depending on the speed of the server.

During the process, status messages will be displayed. *PLEASE leave the screen visible and do not navigate away from the page until the process completes.*   While the promotion process will continue to run, there will be no way to navigate back to check on the status. The screen will be updated every 10 - 15 seconds during the process.

Undo

As group members are promoted, the process marks where each group member was promoted from so that if there are issues such as attributes which were not set properly, the process can be undone, attributes edited and the promotion redone.

NOTE THAT ONLY THE LAST PROMOTION CAN BE UNDONE. Both Group and Age promotion use the same attributes to track movement, so only the last promotion is tracked. Each promotion (whether Group or Age) will wipe out all undo attributes and reset them according to the last promotion performed. If both tools are being used, please check the results after each promotion is performed in case an undo is needed prior to running the second promotion.

If there are undo attributes on group members, the "Undo Last Promotion" button will be enabled. Press the button to undo the promotion.

This process can take almost as long as the promotion process itself and will update status as it goes. *Please do not navigate away from the page until complete.* Even though the process will continue, you will not be able to navigate back to see status.

Other Uses

By default, the BEMA Promotion Plug-In adds the attributes it uses to the Check-In group type in Rock. However, the Promotes To, Start DOB and End DOB can be manually added to any group type and used to move members from one group to another. If adding manually, it is important that the Key on the attributes be set to the same value as the attributes under Check-In in so that the block will find the attributes and allow promotion of the group type. The Key for Promotes To is "PromotesTo". The Keys for DOB attributes are "StartDOB" and "EndDOB" respectively.