

Beanstack
General Staff Manual



How to Log in to the Staff Side

1. Go to: [insert your Beanstack URL]
2. Click "Sign In" in the top right corner.

Username:

Password:

Where is Beanstack on the website?

You will be able to find it under the Children's and Teens drop down menus.

1. Go to our website
2. Hover over the Childrens or Teens tab.
3. Go down the list until you see "Beanstack-Summer Reading", then click it.
4. Then click on the "Beanstack" logo or the Beanstack link.

Beanstack Glossary (Key Words & Phrases)

These are some of the frequently used terms in Beanstack

Account Creator: This is the person who is the "owner" of the account and who logs in with their credentials.

Reader: This is the person(s) for whom an account creator is logging reading or activities. There may be more than one reader attached to the account.

NOTE: The account creator and reader could also be the same person. For example, if an adult or teen signs up to participate in a program, s/he will create an account and register him/herself as a reader, too. On the other hand, a parent might sign up a child and not him/herself. In that case, the parent is the account creator, and the child is the reader.

Example: If Count Olaf and his wards were patrons and wanted to sign-up, then Count Olaf would be an Account Creator. He might be a Reader, too, depending on his scheme of the day. Sunny, as a baby, would be a Reader under Count Olaf's account, but because Klaus and Violet are old enough to be responsible for logging their own books, they can have their own accounts, and therefore each would be an Account Creator and Reader.

Badge: Virtual rewards tied to prizes for programs and/or Learning Challenges

Program/Challenge: Set up of any seasonal and/or ongoing programs such as Summer Reading, 1,000 Books Before Kindergarten, and Book Clubs.

Activity Badge: A series of activities, oftentimes based on a specific subject or theme for a particular program.

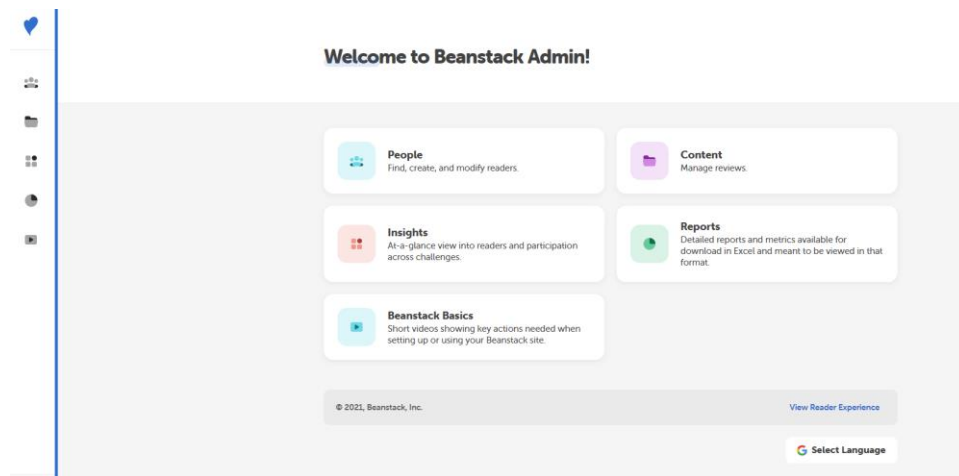
Book List: A great way to recommend several books all at once! They can be based on a specific topic, theme, age group, or grade level. All books added will link back to books in your catalog.

Book Reviews: Readers are able to write a review of what they have read and logged in their Beanstack Reading Log.

Log Type: Different ways in which someone might be tracking reading in Beanstack. Log types include days, minutes, books, and pages.

View Reader Experience: The link at the bottom of a staff member's page that takes you to that account's view as a patron. It does not mean you can see the view of the reader whose page you have pulled up to view. Rather, it is your account's view as a patron/reader.

Beanstack Administrative Sections Overview



People: in this section, you can access user information, add accounts, and check out contact messages. You may also easily search for readers and log on their behalf or redeem prizes for them here.

Content: In this section, you can create or edit content for your site such as book lists and learning tracks (activity badges). This is also where you will find Book Reviews for approval.

Insights: In this section, you can check out an at-a-glance view of your library's data without downloading a report. You can tailor your insights experience by creating a customized dashboard.

Reports: In this section, you can view and export your site's statistics with Excel documents sent to your email address.

Beanstack Basics: In this Section are helpful videos made by Beanstack for staff on how to do different things in Beanstack. Feel free to browse!

If a patron used Beanstack last summer, they should use their account information from last summer to login and register for this year's summer reading program. If they forgot their password, they can click the "forgot password" link once they are on the app or website. You are also able to reset their password for them.

First time users should create a new account on Beanstack. Directions for patrons are on the website.

How to Find People

1. Log in.
2. Click "People."
3. Click "Find a Person."
4. Type in the patron's *first and last* name and click "Search."
5. Scroll down to find the person's account.

How to Change a Patron's Password

Patrons are able to reset their own passwords by clicking Forgot Password when logging in, but we are also able to do it for them.

1. Go to People > Find a Person.
2. Enter search information to find the person.
3. Click Edit Next to the Account Creator's name.

| ACCOUNT CREATOR | READER | READER'S AGE |
|--|---------------|--------------|
| Tiffany Zootest Edit Email: tracyzootest@gmail.com Username: tifftest Branch: - | Avery Zootest | 9 |

4. Enter their new password, confirm it, and click **Save** (passwords must be 6 characters in length)

Account Creator

Edit Tiffany Zootest

First Name * Tiffany Last Name * Zootest

Email Address tracyzootest@gmail.com Phone Number

Username * tifftest Zipcode

Password * Password Confirmation *

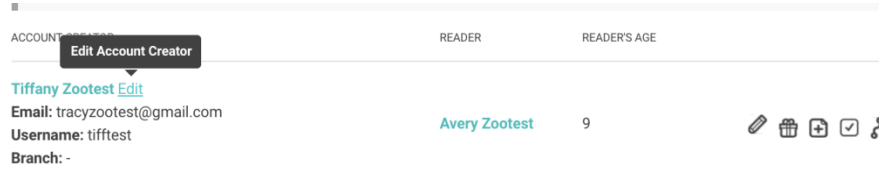
Role Patron Status Active

Save Cancel Delete Account Creator

Note: that you will also have to add any newly required information that may not have been previously entered for the account in order to save.

How to change or update an account creator's email

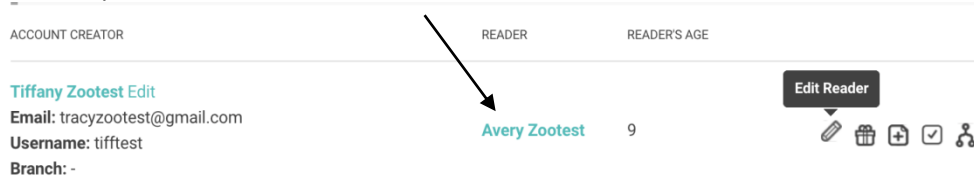
1. Click on People > Find a Person.
2. Enter search information to find the person.
3. Select the "Edit" link next to the Account Creator's name



4. Make any changes necessary (i.e. email address, branch.)
5. **Save!**

How to update a reader's information like their grade level or school

1. Click on People > Find a Person.
2. Enter search information to find the person.
3. Select the pencil icon next to the Reader's name.



4. Make any changes necessary (i.e. school, grade level).
5. **Save!**

How to Create an Account

Please see the Patron Guides on the website on how they create their accounts. But just in case, here is how you would make an account for a patron:

1. Go to People
2. Search for the person to be sure they do not have an existing account. If they do not, click on *"Didn't find the right person? Add and Account."* link.
3. Enter their name and basic login information.
4. Enter account information. You must enter all required fields, marked with an * for the account. (Remember, the account creator is the person who will be logging in. If you are signing up an 8-year-old, and the child's parent is with them, then be sure to use the parent or guardian's information in these fields.)
5. Who is the account for? **Always leave it as A Family or Individual. Never Click Group.** (We are not using the Groups option.)
6. Is this person registering to participate? For example, if it is an adult, is the adult registering to participate, too? If so, select "yes" to the question "Is this person registering as a reader," and the finish completing that information.
7. Is this person registering readers other than themselves on the account? If so, answer yes to the question "Are you also registering other family members on this person's account?" and add reader information. Select "add reader" and then continue to add as many readers as needed to be on the account.
8. Select "Create Account"

Note: **The default password when you make an account for someone is *beanstack*.** If you want to change the password, you will go to People > Find a Person. Then, search for the account that you just created and click "edit" next to the account creator name. From there, type in the new password two times and save.

How do patrons enroll in a challenge using Beanstack?

First, let's define a challenge! A "challenge" is just a fancy word for program in Beanstack, something like Children's Book Week; a onetime program/challenge that asks patrons to log reading or do activities.

The Beanstack homepage is like the gateway to available programs for a person. Once an adult signs up, they will see all available reading programs for their age group. If an adult signs up a child, or a teen signs up himself, they will see programs available for their particular age or grade group, the child or the teen. Patrons have to have an account and have to "opt into" programs by clicking "Register for this Program" from their programs page.

After a program ends, a person may still login to Beanstack to view his/her log and to track reading. When new program becomes available, the person will again have to register for that particular program by clicking "Register for this Program."

How to Redeem Prizes for a Reader

1. Go to People > Find a Person.
2. Enter search information to find the reader.
3. Click on the “Gift” icon next to the reader's name.
4. Select the prize you want to redeem and click on the empty checkmark next to it



Most importantly:

NEVER DELETE ANYTHING!

**DELETING IS PERMANENT AND NOT EVEN BILL GATES
CAN FIX IT.**