Bluffton Public Library's

BEANSTACK MANUAL

Created June 2020

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Beanstack Site and Staff Accounts

Landing Page
The Landing Page is the Homepage for our library's Beanstack. Go to **blufftonpubliclibrary.beanstack.org**, and if you're not logged in yet, you will see the landing page. On this page, patrons and staff can create an account or log in. You can also view the **Bluffton Reading Challenge** tracker, upcoming events, and book reviews that staff have approved to be on the site (only adult reviews can be public on the landing page, though). Our logo in the upper left corner is linked to blufftonpubliclibrary.org.

Staff Login Info
Username: (your first name)
Password: (defaults to "beanstack," so change this to your own, unique password)

Staff Beanstack Tasks/Capabilities
- Viewing Accounts Creators and Readers
- Updating Accounts Creators and Readers
- Deleting Accounts Creators and Readers
- Logging Reading, Activities, and Reviews
- Redeeming Prizes/Rewards and Incentives
- Adding Offline Readers
- Managing (Approving or Denying) Reviews
- Running Insights and Reports

Toggling Between Administrative Access/Reader Experience
To view the **staff side of the website** while you are logged in, look for **Administrative Access** at the end of the list of links on the bottom left corner of the screen.

© 2020 Beanstack   FAQ   Contact Us   Terms & Conditions   Privacy Policy   Share Code   Administrative Access

To toggle back to the **reader side of the website** while you are logged in, look for the link **View Reader Experience** in the bottom right corner of the screen.

View Reader Experience

How Patrons Create a Beanstack Account

1. Go to **blufftonpubliclibrary.beanstack.org**

2. Click **Register an Individual or Family** button under the program description.

FOR ALL AGES

BLUFFTON
PUBLIC LIBRARY

"Imagine Your Story"
June 15 - August 15, 2020

—

Bluffton Public Library's 2020 Summer Program

Bluffton, Ohio 45817

Register an Individual or Family

Already registered on this site?

Sign In

3. Select **I am Registering Myself** to create an account for yourself or your family (After you register yourself, this link will take you through prompts to sign up other family members, too).
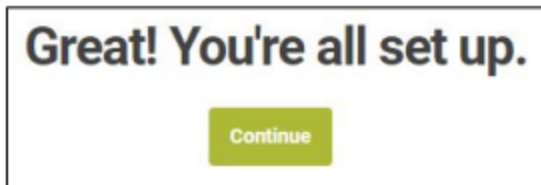
Who would you like to register?

I am registering myself.   I am an adult registering a child.
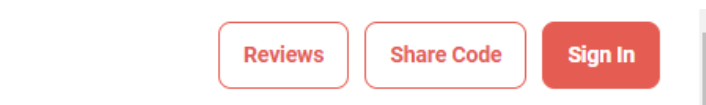
4. Create a profile by filling out the form. Adults should choose **19+** as their age group and select **Not Applicable** under **What school will you attend this fall?** Make sure to keep your login information in a safe place. If you have a family of registrants, your username and password will be used for all of them. Click **Next** when you're done creating your profile.

5. Next, register yourself for your age group's reading challenge by clicking **Adult Summer Program 2020**. Click **Next** and if you have a family to register, follow the prompts to add another adult(s) and/or a child(ren) reader(s). Otherwise, skip ahead to learn how to navigate your own Beanstack account!

6. If you are adding family members, continue creating profiles for everyone in your family by filling out a form for each and following the prompts of **Yes** or **No** to add each family member.

7. As you create profiles, you will need to enter each family member into the **Reading Challenge** they want to participate in (according to their age group) by clicking on the challenge's title.

8. **Congrats!** Once you're done you (and your family members, if applicable) receive your first badge for creating a **Reader Profile**! You will see a pop up screen that says **Badge Unlock.**

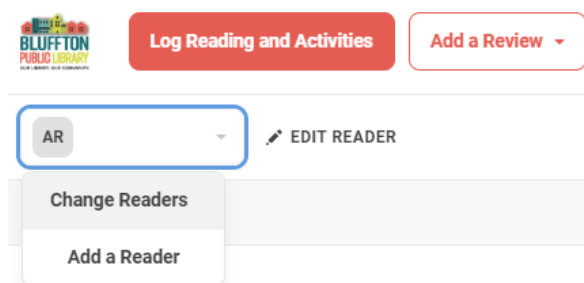9. Click **Continue** to proceed to your account!

How Patrons Navigate Their Beanstack Account

1. Go to **blufftonpubliclibrary.beanstack.org**.

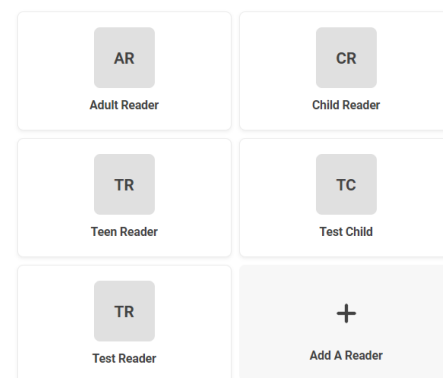2. Select the **Sign In** button in the upper right corner.

3. Enter your login information (the **Username** and **Password** that you created when registering), and click Sign In.

4. After you log in, you will be taken to your **Reader Portal**.
Or, if another family member in your account was on their portal last, their portal will open first. Each family member is a **Reader** and has their own **Reading Portal.** To switch between Readers, use the dropdown menu in the upper left and click **Change Readers.** (Or if there are less than four readers in your family account, the list of account reader names will all appear in the dropdown so you can just select a name.)
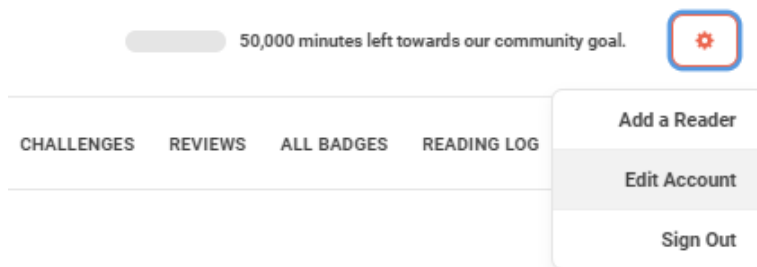

Select the name of the reader to view their portal. (This is the page that opens if you have four or more readers and click "Change Readers.")
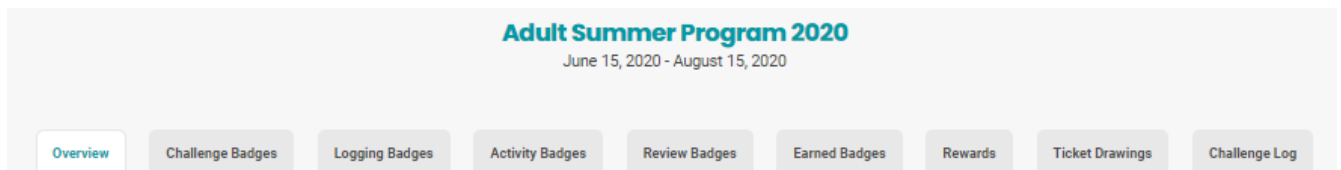

5. You can add a reader to your account at any time.
Click the down arrow next to the name of the reader that appears at the upper left and select **Add a Reader.**

6. You can also edit a reader's information (including your own information) at any time. Click **EDIT READER** next to the name of the reader that you want to edit at the upper left of the screen.

7. To edit information about the reader, click on **Basic Information** under **Preferences.**

8. Change any personal information for the reader that needs to be changed (e.g., If your last name or zipcode changes, or if your child switches schools). Then click **Save.**

9. Back under **Preferences**, you can choose to receive personalized recommendations for that reader, receive notifications about the reader's progress in a program, share the reader, or deactivate the reader.

10. To change your password or edit your account, click the gear icon at the top right of the screen and select **Edit Account.**

11. Change any account info that needs to be updated (i.e. Update your phone number or email, or change your password), then click **Save.**

12. To logout of your Beanstack account, click the gear icon at the top right of the screen and click **Sign Out.** You will automatically be taken back to our library's Landing Page**.**
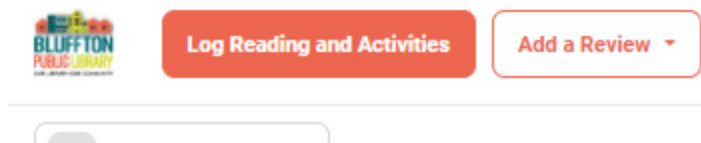
How Patrons Log Reading in Beanstack

1. After signing into your account and navigating to the reader for whom you want to log activities, you can scroll through the reader's **Overview** page to learn more about the **Reading Challenge** and view the minimum amount of badges you need to log in order to complete the **Summer Reading Challenge.**

Adult Summer Program 2020
June 15, 2020 - August 15, 2020

| Overview | Challenge Badges | Logging Badges | Activity Badges | Review Badges | Earned Badges | Rewards | Ticket Drawings | Challenge Log |

2. To log your reading, click on the Log Reading and Activities button in the upper left corner.

Log Reading and Activities   **Add a Review ▾**

3. If you have more than one reader in this family account, this will bring up **Who would you like to log for?** and **What would you like to log?**

Who would you like to log for?
Select a profile. *

Lauren's ▾

What would you like to log?

Minutes   Activities

Choose the profile for which you want to log reading, and then click **Minutes.** We will discuss **Activities** in the next section!
Note: You can also log reading for **All Readers** if you read together! (However, this will not work for **Early Readers** since they log **Books** and not **Minutes** like in the other age group's challenges.)

4. When you arrive at the screen below, choose the date you read on the calendar, fill in **Time Spent Reading** (you can abbreviate minutes with "m" and hours with "h"), type in the **Title** of the book you read (required), and include the Author (if you'd like).
If you'd like, you can include a review for the book you read, but remember that

these reviews do become public later (although reviews that children complete can only be seen by other children and their name is not included.)

5. Click on the **Log** button at the bottom. If you chose to include a review, that will take you to the **Write a Review** page (below).

6. Fill out your review and click on **Save**. (Note that you can write a review later without logging hours by clicking on the **Add a Review** button back on your **Reader Portal**.)

Log Reading

ⓘ This time will be logged to Lauren's profile.

Select a day.

Days that have minutes logged are marked with a green dot (●).

		June 2020				
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Time Spent Reading

Type "1h", "33m", or "1h33m"

Title

Author OPTIONAL

Would you like to include a review?

No ▼

Log   Close

How Patrons Complete Activities in Beanstack

1. Select **Log Reading and Activities** in the upper left corner of your **Reader Portal** to log activities.

2. Choose your **Reader** (if you have family members in your account) and then click Activities.

Who would you like to log for?

Select a profile. *

> Lauren's ▼

What would you like to log?

Minutes   Activities

3. Click on **Activity Badges** to read each step to complete the activity. You may need to answer questions to explain how you completed the activity.

4. **Checkmark** each step in your activities as you complete them (and fill out the answers in order for them to be counted). Every age group has different challenges.

5. Have fun earning activity badges! Many **Activities Badges** earn **Tickets** that can be used in **Drawings** just like **Reading Badges**.

Adult Summer Program 2020
June 15, 2020 - August 15, 2020

Overview | Challenge Badges | Logging Badges | Activity Badges | Review Badges | Earned Badges | Rewards | Ticket Drawings | Challenge Log

Activity Badges

Beverage & Book Pairing
Coffee & Books

Listen to an Audio Book
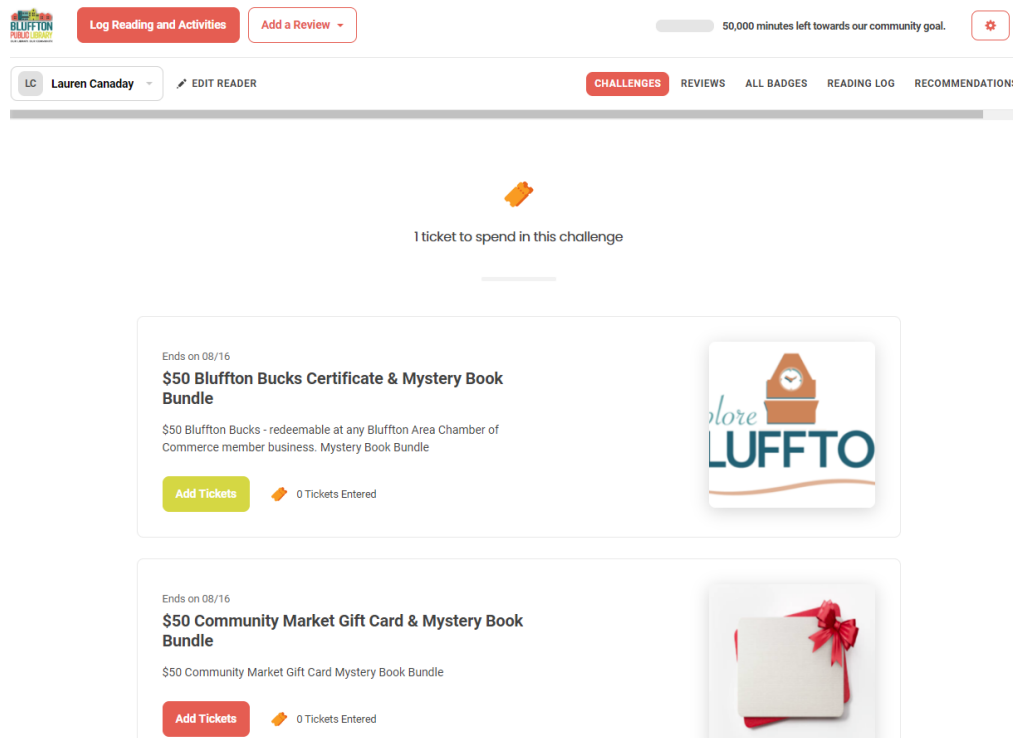Listen to a Story

Participate in a library program
Your Library

Note: You can also find Activity Badges by clicking on the **Activities Badges** tab on your Reading Portal!

How Patrons Earn Tickets and Enter Prize Drawings

1. To choose which grand prize drawing to enter, click on **Enter a Drawing** when you earn a ticket**.** If you don't click on this, you can always go to your **Ticket Drawings tab** in your **Reader Portal** at a later time before the program ends.
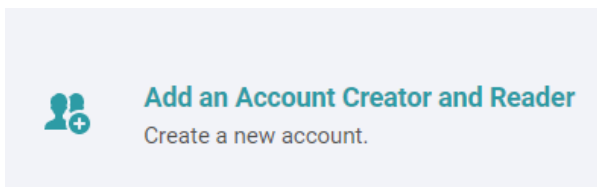

2. In the **Ticket Drawings** tab of your portal, click **Add Tickets** under the grand prize drawing you would like to enter.

3. If you accrue more than 1 ticket, you can change the number of tickets you enter into the drawing by clicking the **plus (+) or minus (-) signs**. You can choose to place those tickets in whatever amount you'd like onto whatever prize or combination of prizes you'd like!

4. After entering your ticket(s) into the drawing, the number of tickets added to that drawing (and whether you have any tickets left) is displayed.
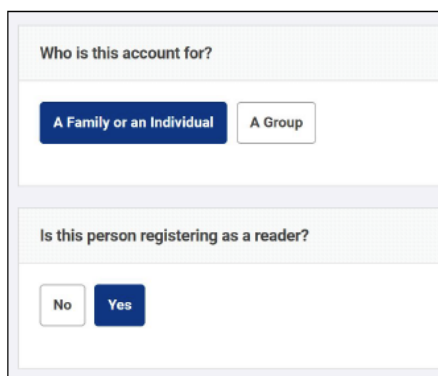
How Staff Create Beanstack Accounts for Patrons

1. (This is for patrons who want us to create accounts for them but are not **Offline Readers**.) When logged in and viewing **Administrative Access,** click on **People** (either one will work).

2. Select **Add an Account Creator** and **Reader**.

3. Be sure to tell the patron that the default password is **"beanstack"** and that they need to log into their account to change it.

4. Fill in the information for the patron, choose **A Family or Individual** (we are not doing groups)**, ALWAYS** register them as a **Reader**, and **IMPORTANT:** make sure the **Role** is set to **Patron** under Zip Code.

5. Remind the patron to save their **Username** in a safe place (and their **Password** once they get on to set it themselves).

6. Enter the patron's **Age** and **School (if applicable)**, mark whether they want to receive email notifications, and click the **ENROLL** box next to the program for which

they qualify.

7. If the patron is only registering themselves and will be the sole person on the account, select **No** in response to **Are you also registering other family members on this person's account?** If the patron has additional readers to add (e.g., spouse, children), select **Yes.**

8. If you selected **Yes,** enter each additional reader's information, and follow the same steps as above for each additional reader. Click **Add Reader** after filling out information for each **Reader.** Make sure to enroll each reader in the appropriate **Reading Challenge.**

First Name *

First name

Last Name *

Last Name

Age *

Select an age

What School Will They Attend This Fall? (If Applicable) *

Begin typing a school name. Your admin may have added "Other" or "Not Applicable" for adults, too.

Email Settings

Does this reader want to receive email notifications?
If you disable email notifications, the account creator will not receive email notifications about rewards for this reader.

Disabled

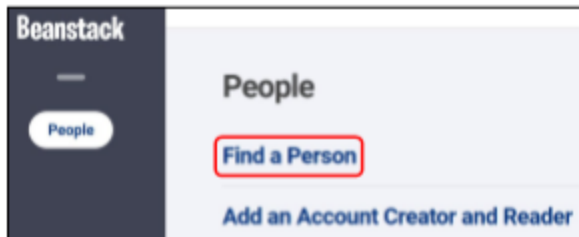**Add Reader**   Cancel

Create Account

9. When you are done, click **Create Account.**

How Staff Search for Patrons in Beanstack

1. When logged in and viewing **Administrative Access**, click on **People** (either one will work).

2. Select **Find a Person.**

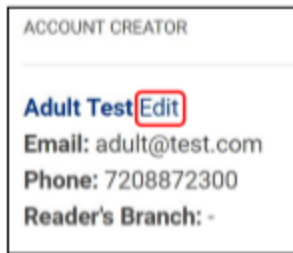3. Enter as much information about the patron as you can and click **Search.**

4. Scroll through the results to find the correct patron. From this page, you can:
   a. **Edit** an **Account Creator**'s and/or a **Reader**'s information
   b. **Log Reading** for a patron
   c. Mark whether patrons have picked up **Prizes**
   d. Click into a **Reader**'s page to get more detailed info

   You can hover over the small icons on the right side of each patron to see which icon does what function.

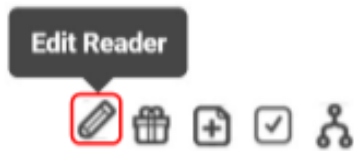# How Staff Edit Account Creator Information in Beanstack

1. After logging in and searching for a patron, click **Edit** next to the **Account Creator**'s name.

ACCOUNT CREATOR

Adult Test Edit
Email: adult@test.com
Phone: 7208872300
Reader's Branch: -

2. Retype any information that needs to be updated.

3. Click **Save.**
   NOTE: If a patron has forgotten their password, you can enter a temporary password (use **"beanstack"**) so they can log in and then reset their password.

4.

How Staff Edit Reader Information in Beanstack

1. After you log in and search for a patron, click the **Edit Reader** symbol next to the name of the reader you need to edit.

   NOTICE: The **Account Creator** (in the left column) to the left of the **Reader**'s name (in the middle column) is the patron who created the family's **Account** and may or may not have their own **Reader Profile.**

   Clicking the **Edit Reader** icon will edit the **Reader Profile** of the name in the middle column (under **Reader**).

2. Retype any information that needs to be updated. For **Early Readers, Kids,** and **Tweens & Teens**, information will most likely eventually need to be updated under **Age** or **School**. A last name may also need to be updated if there is a name change.

3. Click **Save.**
   (NOTE: Patrons are also able to edit all of this from their **Bluffton Public Library Beanstack Accounts**.)

4.

How Staff Log Reading for a Patron in Beanstack

1. After you log in and search for a patron, click the **Add to Log** symbol next to the name of the reader for which you need to log progress.

2. Make sure the correct **Challenge** age group is selected.

3. Choose a **Log Type** in the dropdown menu. **Early Readers** log **Books**, but every other age group logs **Minutes.**

4. More options will pop up, and you can input the time read with **"h"** as the abbreviation or hours and **"m"** as the abbreviation for minutes. See below.

5. You should also input the **Book Title,** but you do not need to input **Authors** if the patron does not know it**.**

6. When you click on the date option at the bottom, a calendar will open. Select the day the patron wants to log reading. The patron may want to log reading for multiple days so you will need to run through the above steps again for each day if so.

Log Reading for Lauren

Lauren is not currently enrolled in any challenges.

Log by *

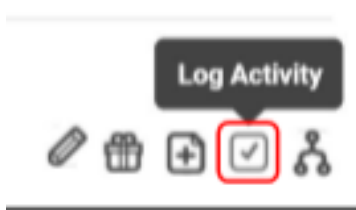| | June 2020 | | | | | |
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

2020-06-11

Log

7. Click **Log.**
8.

How Staff Log Activities for Patrons in Beanstack

1. After you log in and search for a patron, click the **Log Activity** symbol next to the name of the reader for which you need to log progress.

2. You'll see different **Activity Badges** that patrons can complete. Click on the one that the patron wants to complete.

3. Use the calendar to select the day the activity was completed.

4. **Checkmark** each step in the activity. (You may also need to answer questions to explain how they completed the activity, so fill out their answers in order for them to be counted). Every age group has different challenges.

5. Once the tasks are checkmarked, they're counted, and you can click **Close**.

6.

How Staff Track When Patrons Pick up Prizes in Beanstack

1. After you log in and search for a patron, click the **Redeem Incentives** symbol next to the name of the reader you want to track prize pickup for.

2. A pop-up window will show you which prizes the reader has earned. When a **Reader** comes to pick up prizes, click the **Redeemed** box next to each prize they receive so that other staff will see in future interactions that the reader has already picked up those prizes. Click **Close** when you are done.
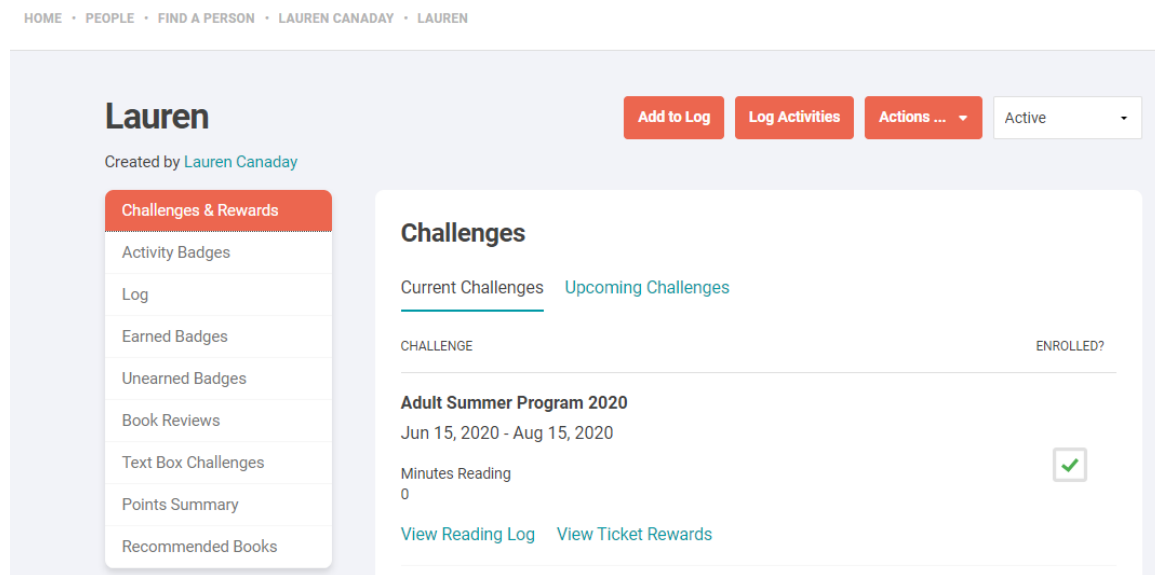
How Staff View & Edit Detailed Reader Information in Beanstack

1. After you log in and search for a patron, click on the **Reader's** name. This opens the **Detailed Information** screen.

2. On the reader's **Challenges & Rewards** page, you can view which challenge the reader is registered for, whether they have earned any rewards, and if they have won a drawing.

3. The reader's **Activity Badges** page shows which badges they have available on their age group's **Reading Challenge.**
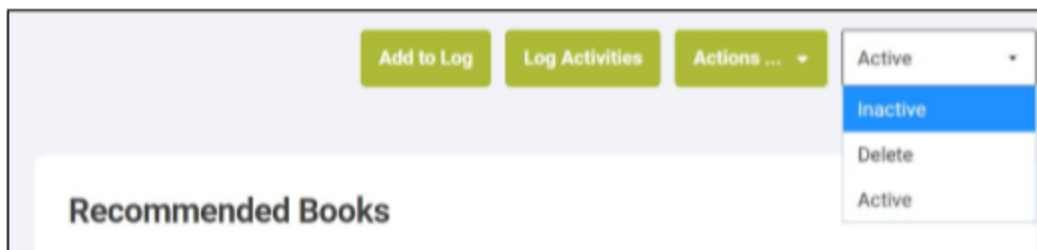
   NOTE: Staff should **NOT** checkmark completed activities here because it will automatically check off all the tasks in the **Activity** instead of going through the questions as you would as detailed in the **How Staff Log Activities for Patrons on Beanstack** section. To complete activities, please follow the steps outlined in that section.

4. The reader's **Earned Badges** page shows which badges they have achieved and earned so far.

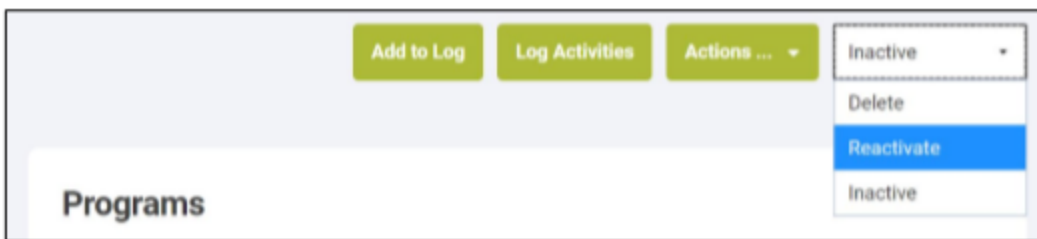5. The reader's **Book Reviews** page shows book reviews they have submitted (if any).

6. The reader's **Text Box Challenges** page shows any answers they submitted while completing **Activity Badges** (some **Activities** require typed answers in order to complete them).

7. The reader's **Recommended Books** page shows book recommendations they have received (if any) if they chose to receive book recommendations from Beanstack at account setup.

Activating and Deactivating Readers

1. **If** a patron **(Account Creator)** wants you to **Deactivate** a **Reader** in their **Account**, follow the steps to open a reader's **Detailed Information,** as explained in the section above.

2. Then click the down arrow where it says **Active** (in the upper right corner of the screen), and select **Inactive.** The reader is now inactive and will not show in the patron's account when they log in.
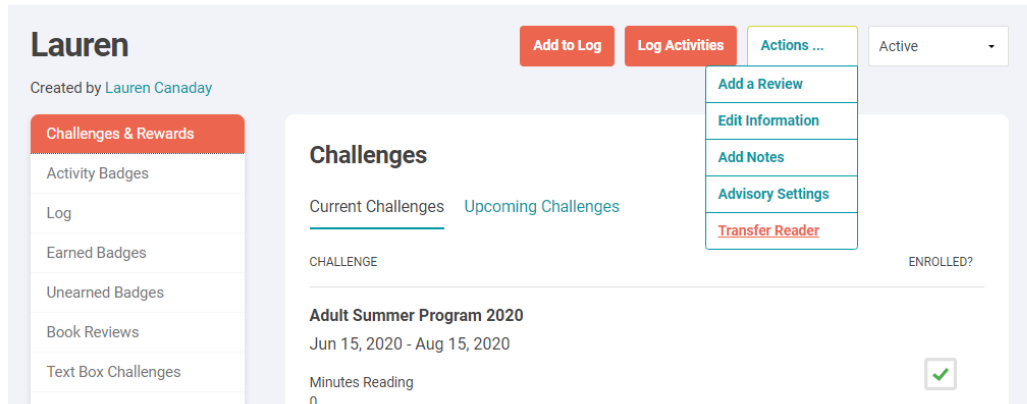

3. If a patron (**Account Creator**) wants you to **Reactivate** a **Reader** in their **Account**, click the down arrow where it says **Inactive** (in the upper right corner of the screen) and select **Reactivate**. The reader is now active again and any progress they had made in an active program before being deactivated will be maintained.

PLEASE NOTE: Patrons are able to delete readers from their account on the Patron Side of Beanstack. If they delete rather than deactivate, the Reader's information is not able to be retrieved.

Transferring Readers

1. If a patron (**Account Creator)** wants you to **Transfer** a reader in an already existing **Account** to their own **Account** (if they accidentally created two accounts instead of linking the **Readers** to one family **Account**), start by following the steps to open a reader's **Detailed Information**.

2. Click the down arrow next to **Actions**. Select **Transfer Reader**.
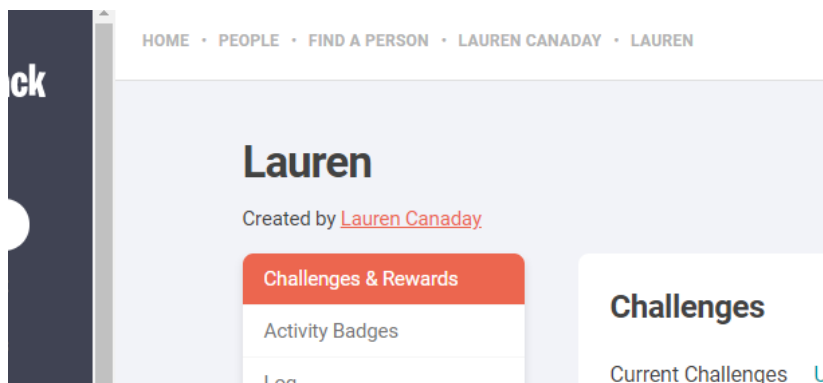

3. Type the email or phone number of the patron whose **Account** the **Reader** should be transferred to, and select the correct email from the dropdown options.

4. Verify the account transfer information is correct.
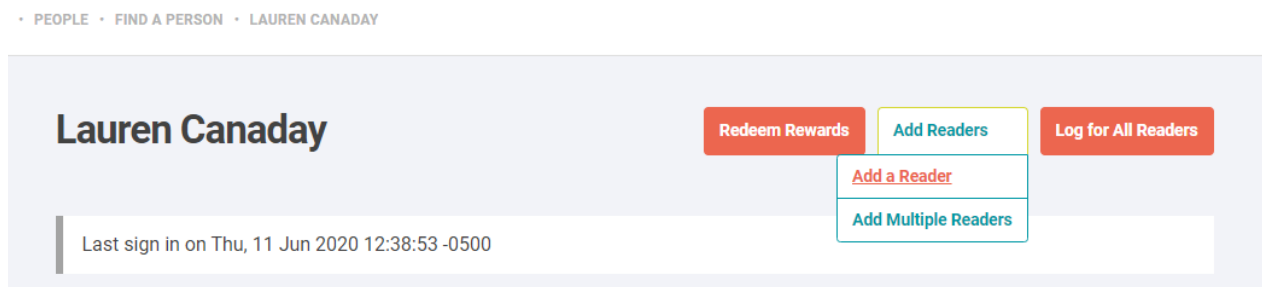
5. Click **Save** and **OK**.

Adding Readers to an Existing Account

1. If a patron (**Account Creator**) wants you to add a **Reader** to their already existing **Account**, search for the patron, and then follow the steps to access their **Detailed Information**.

2. Then, click on the name of the patron who is the **Account Creator** in the upper left corner of the screen. You can click where it says their full name next to **Created By:**

3. Click **Add Readers** and then select **Add a Reader**.

4. Enter the required information for the new **Reader**, make sure you enroll them in the appropriate **Reading Challenge,** and then click **Add**.

More Information

Beanstack has an online help website. If you need more information (For instance, if you need to learn how to run **Reports** or **Insights**), you may be able to find it on this website by performing a search:

https://zoobean.zendesk.com/hc/en-us

Hope this manual helps you as we learn to use this new software!

:)