

# Summer Reading 2021 Quick Reference Guide

The online program will be in Staff Training mode until the end of April/Mid-May.

Our Beanstack website is <https://cedarfallslibrary.beanstack.org/>

- You may practice creating accounts on both the patron and staff side of Beanstack, BUT ALL accounts created must have the word Test in front of the first name, last name and username. This allows us to easily find all practice accounts and delete them before the start of SRC.
- For example: Name:TestRex; Last Name: TestDog; Username: TestRex.
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## Staff Login information

- [youth@cedarfallslibrary.org](mailto:youth@cedarfallslibrary.org)
- [reference@cedarfallslibrary.org](mailto:reference@cedarfallslibrary.org)
- [info@cedarfallslibrary.org](mailto:info@cedarfallslibrary.org)

Currently the password is “beanstack”

Kelly, Amy, Jessica, Michael, and Bekah have admin accounts.

General Staff Overview Webinar: <https://zoobean.wistia.com/medias/4cvpmgi69g>

**Beanstack has other tutorial videos you can access when you login and go to: “Beanstack Basics”**

## Patron View

### Patron Registration

Patrons who have made accounts on Beanstack can access our challenge. They can use their login information or staff can search for them in Find a Person to enroll for the new program. Participants click Register an Individual or Family. They have the option to add other family members and register themselves, no matter which one they choose.

#### Family accounts

- Adults enter their information first. This person is the Account Creator. **An account creator is the person who will login to this account and log reading for the readers attached to the account.**
- Required Registration fields include First Name, Last Name, email, and password
- Account Creators are then asked to fill out the child’s name, age, and school they

- attend. Other or Not Applicable are choices.
- Account Creators can check/uncheck the box for book recommendations for child sent to their email.
- Option to add other children
- Option to register yourself (the adult/Account Creator)
  - Will ask for age (18+) and school (not applicable)
  - Option for book recommendations for adult/Account Creator

Option to add other adults

#### Individual accounts

- Click on **I am registering myself**
  - Registration fields include First Name, Last Name, Email, Phone Number, Password, Age, and School.
- Account Creators can check/uncheck the box for book recommendations sent to their email.
- Hit the green **Next** button

#### Patron Home Page

##### Log Reading and Activities

Click on the green button **Log Reading**, located at the top of the screen.

- For Family Accounts, reading can be logged for individuals or all family members. Activities cannot be logged for All Readers at once; it must be logged individually.
  - Choose the family member's account or All Readers from the drop down menu to log
- **To log reading :**
  - Choose the **Log Days** box
  - Select the days read
  - Click the green **Log** button at the bottom.
  - Click either the Back button at the top left or the red **Close** button at the top right to leave the logging screen.
  - To return to the Logging screen, click the green **Log Reading** buttons

##### To Log activities

- Choose the **Activities** box
- For Family Accounts, remember to choose the individual whose log the event should be added to from the drop-down
- Click on the badge of the Activity

##### To redeem tickets

- Go to ticket drawing tab.
- Use up and down arrows on the hair color boxes to decide how many tickets to place in each hair color option.
- Whichever box gets the most tickets will be the color Miss Bekah dyes her hair.

## Staff View

### Find A Person

Search for a person by using name, phone number, or email address. Note: phone number is sensitive to the -/ marks. You can do partial names, usernames and emails.

- **Search results:**
  - The left column is the Account Creator (parent/caregiver/guardian account)
  - The middle left column is the Reader on the account. If it is an individual account, it will be the same as the account creator. If it is attached to a family account this will be different from the account creator.
  - Middle right column provides the age to help verify it is the correct account.
  - Icons: edit, redeem gift, add to log, log activity, challenge actions (enroll)
- **Reader column:** If you need more details on a reader to assist them, click on their account name under the Reader column.
  - This page allows you to see their logs, activities, and badges earned.
  - You can log reading, activities and redeem prizes on this screen as well.
- **Account Creator** (far left column):
  - *To edit and change password:* Click on the Account Creator's name and then click on Edit under the Account Info on the right side. This is where you can reset their password.
  - To see all family members under an account, click on the Account Creator's name.
    - It will list all family members. You can click on each account to log directly from here. To get back to the family list, click on the Account Creator's name in blue at the top of the screen.
    - You also have the option to add additional readers under the family account here.

### Add an Account Creator and Reader

- Always search for a person first, before creating a new account.
- Enter in First and last name, username, and email.
- It defaults to **A family or individual**
- Under **Is this person registering as a reader?**
  - Choose No if it's an adult not participating
  - If yes
    - select age in the drop down menu
    - choose the school from the drop down. Adults can choose Not Applicable.
- Ask if they are registering other family members on this person's account.

- If yes, fill in the reader's name, age and school
- Click the green Add Reader button
- Click the green Create Account button
  - A green message at the bottom will say the user was successfully created
- To log for the newly created reader(s), go back to People , click Find a Person, etc.

### Transfer a Reader

This is used if a single account needs to be placed under another Account Creator (e.g., a child registers an account, and now the parent wants that account in the family account)

- You will first need to know the phone number and email address of the Account Creator you will be transferring a particular reader to.
- Go to Find a Person and search for the account that is to be transferred.
- Click on the username under the Reader column
- At the top click the Transfer Reader button
- Type the email address or phone number of the Account Creator you are transferring the Reader to.
- Click Save
- A pop up message will ask if you are sure you want to transfer the reader.
- Click ok.
- The Reader should now be under the Account Creator
  - Note: the Reader will still be able to log in with their email and password but it will not allow them to log reading & activities. The Account Creator the Reader was transferred to will now need to log the reading & activities.

### Redeeming Prizes:

To show that the patron has picked up their free book/books, patron under "Find a Person". Click on the reader's name. Then, under rewards click in the green box. It will fill with a green ✓ indicating that the prize has been given to the patron.

### Troubleshooting/Common Questions

- What if the patron's phone number has already been used (and no email address)?
  - The patron can be transferred under the account of the other patron with that same phone number (if it's a relative or someone they live with) OR they need to provide an email address. If they don't want either of those options, they will not be eligible for the raffle.
- What if the patron's email address has already been used?
  - The patron can be transferred under the account of the other patron with that same email address (if it's a relative or someone they live with) OR they need to provide a phone number or alternate email address
- How to Fix/Edit Points
  - Search for the patron
  - Click on the name under Reader

- Click Log at the left side
- Find the points/reading that fixed
- Click the trash can icon at the right to delete the entry
- Click Add to Log at the top
- Fill in the correct points/info
- Note : it may take a few minutes to update the points and/or rewards
- How to Add a Reader to an Existing Account
  - Search for the patron (account creator)
  - Click on the Account Creator's name
  - Click the green button at the top Add a Reader
  - Click the checkbox next to the club name to Enroll
  - Click the green Add button
  - Click the red Close button
  - The Reader will be listed
  - Do the accounts update the age of the reader?
- Beanstack auto updates ages based off the age given at the time of the account being created. Since the system gives the option for 1/2 ages for children up to 12 1/2 the system updates each 6 months. However, at anytime a patron can update their profile information too. The pop-up asking for an update is related to school, grade, and other items collected during registration.
- How do you make an Account Creator a Reader after they had previously not chosen to be one when registering?
  - The instructions are similar to How to Add a Reader to an Existing Account:
    - Search for the patron (account creator)
    - Click on the Account Creator's name
    - Click the green button at the top Add a Reader
    - Add the First Name (same as the Account Creator first name)
    - Age
    - Click the checkbox next to the challenge name under Enroll
    - Click the green Add button
    - Click the red Close button
    - The Reader will be listed