

# BEANSTACK PATRON SERVICES OVERVIEW

# AGENDA

- Beanstack Terminology
- Reader (Patron Experience)
  - Register, Log, Review
- Administrative access (Staff Dashboard) and basic actions
  - reader lookup and actions – Register, Log, Review
  - Add account Creator and Reader(s)
- Accessing the App



## AGENDA

- Overview
- Patron Experience – Register, Log, Review
- Staff side reader lookup and actions – Register, Log, Review
- Add account Creator and Reader(s)
- Family Registration
- What do patrons see in the App?

## YOU WILL BE ABLE TO

- Show patrons how to sign up for Beanstack and explain the key benefits of registration
  - Users who sign themselves up have a much higher return rate
- Understand the basics of Beanstack's administrative tools in order to provide patron assistance.

## BEANSTACK TERMINOLOGY

### **Account Creator vs. Reader**

- An account creator is someone who initially **signed up** and created a Beanstack account.
- A reader is the person participating in the program, or the person for whom the account creator is doing the logging

**NOTE:** These may be synonymous, especially for adults and teens.

## BEANSTACK TERMINOLOGY

**Challenge** – The overarching reading initiative

- **Episodic:** Has a beginning and end such as Summer reading
  - Reader's age determines eligibility
- **Ongoing:**
  - Readers age in and out of challenge
    - 1,000 books before Kindergarten, 100 books before college

# BEANSTACK TERMINOLOGY

## **Reader Experience vs Administrative Access**

### **Reader Experience**

- Each Reader has their own main page within an account. This is their dashboard where they can switch between challenges, log and earn badges.

### **Administrative Access (staff dashboard)**

- Staff can access patron accounts through this dashboard, to update accounts, create accounts, log and redeem prizes on behalf of patrons.

# LANDING PAGE



Vermont Summer Reading Challenge 2020 - Hosted by the Vermont Department of Libraries  
July 20 - September 9, 2020

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**Let's get reading, Vermont!**



# CHALLENGES

## **Adult Summer Reading Challenge (Ages 18+)**

er 08, 2020



## **Beginning Readers' Summer Challenge (Ages 0-5)**

er 08, 2020



## **Kids' Summer Reading Challenge (Ages 6-12)**

i, 2020



## **Teen Summer Reading Challenge (Ages 13-17)**

er 08, 2020

# Directions to Log-in to Staff Account:

<https://vermontsandbox.beanstack.org/>

vermont.beanstack.org (once page is live)

**Enter Username:** Full name of your library

**Password:** beanstack (default)

## Sign In

Don't have an account? [Sign up for free.](#)

Email Or Username

Password

[Recover password](#) | [Recover username](#)

Sign In

## **Directions to Log-in to Staff Account:**

Each library has one staff login admin account

**First Name:** Full name of your library

**Last Name:** Admin

**Username:** Full Library name (as appears in dropdown menu)

**Password:** beanstack (default)

<https://vermontsandbox.beanstack.org/>

vermont.beanstack.org (once page is live)

## CREATING USER ACCOUNTS











- Family account vs individual
  - Required fields in red
  - Email is optional
  - Age is required and determines available challenges
  - Grade is optional
  - Username is for the entire family or group
- \* **See Training video on Creating and finding User accounts**

# ADMIN DASHBOARD

- Defaults to first user created in family account
- Find a person
- You can see all of the attached accounts
- You can edit the user by clicking on the name link

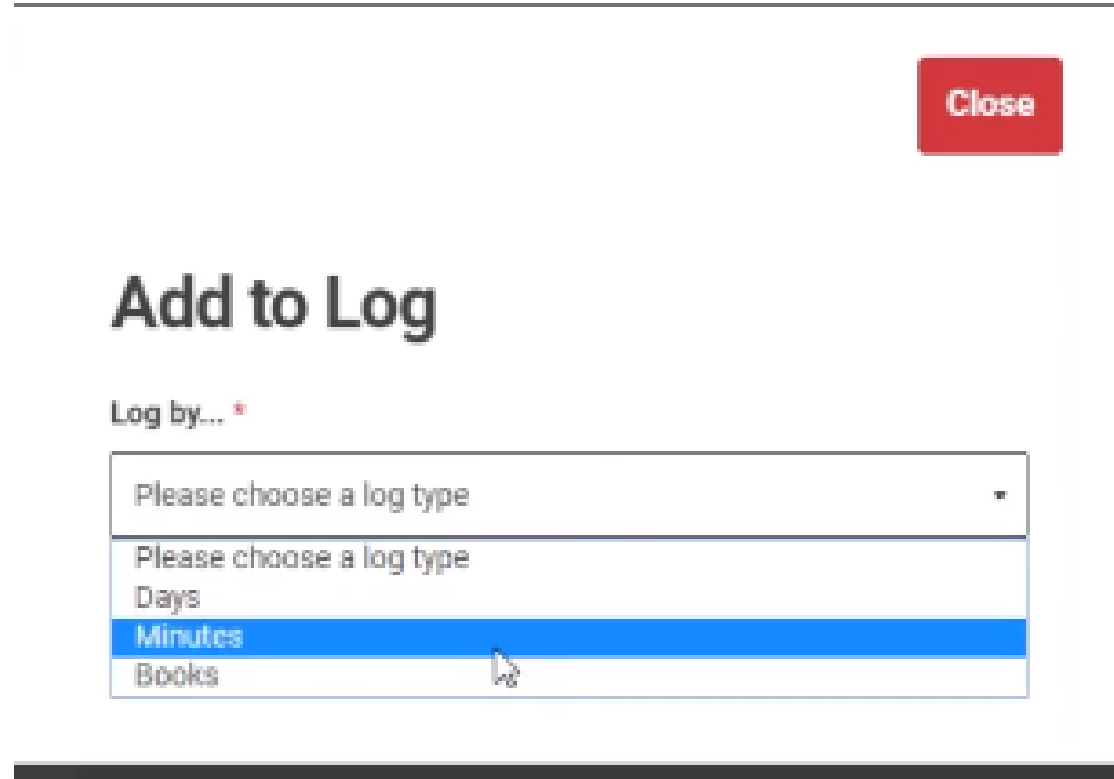
There are 26 results for your search.

[Didn't find the right person? Add an account.](#)

| ACCOUNT CREATOR  | READER                        | READER'S AGE |   |
|--|-------------------------------|--------------|---|
| <a href="#">Tiffany Zootest Edit</a><br>Email: tracyzootest@gmail.com<br>Username: tifftest<br>Branch: - | <a href="#">Avery Zootest</a> | 9            |      |
| <a href="#">Grammy Zoo Edit</a><br>Email:<br>Username: grammyzoo<br>Branch: -                            | <a href="#">Baby Zoo</a>      | 2            |      |

# READING LOGS

- Adult challenge log type is *books*
- All others are *minutes*



The screenshot shows a web form titled "Add to Log". In the top right corner, there is a red button labeled "Close". Below the title, there is a required field "Log by..." with a red asterisk. A dropdown menu is open, showing the text "Please choose a log type" at the top. Below this, there are three options: "Please choose a log type", "Days", "Minutes" (which is highlighted in blue), and "Books". A mouse cursor is pointing at the "Books" option.

# EDIT ACCOUNT CREATOR INFORMATION

- Can not see password but can reset it here
- Administrators can edit username but account creator can not, after initial creation

Account Creator

## Edit Tiffany Zootest

|   |                                      |
|---|--------------------------------------|
| First Name *  | Last Name *                          |
| <input type="text" value="Tiffany"/>                | <input type="text" value="Zootest"/> |
| Email Address                                       | Phone Number                         |
| <input type="text" value="tracyzootest@gmail.com"/> | <input type="text"/>                 |
| Username *  | Zipcode                              |
| <input type="text" value="tiffest"/>                | <input type="text"/>                 |
| Password *  | Password Confirmation *              |
| <input type="password"/>                            | <input type="password"/>             |
| Role  |                                      |
| <input type="text" value="Patron"/>                 |                                      |

# QUICK EDIT FUNCTION

ACCOUNT CREATOR

READER

READER'S AGE

[Tiffany Zootest Edit](#)

Email: tracyzootest@gmail.com

Username: tifftest

Branch: -

[Avery Zootest](#)

9

Edit Reader



[Tiffany Zootest Edit](#)

Email: tracyzootest@gmail.com

Username: tifftest

Branch: -

[Avery Zootest](#)

9

Add to Log



[Tiffany Zootest Edit](#)

Email: tracyzootest@gmail.com

Username: tifftest

Branch: -

[Avery Zootest](#)

9

Log Activity






# ADDING ACCOUNTS

[Import a Users CSV](#)

### Account Creator Info

 The Account Creator's password will automatically be set to "beanstack" after creating their account. Don't forget to remind users to log in and change their password after their account is created.

First Name \*

Last Name \*

Email Address

Phone Number

Username \*

Zipcode

Role

There must be at least one "reader" attached to each creator account (including staff)

Is this person registering as a reader?

No

Yes

# WHERE DO I GO WITH QUESTIONS?

- Contact your primary point of contact at VTLIB  
@jonathan.l.clark@vermont.gov
- Check the help desk: [zoobean.zendesk.com](https://zoobean.zendesk.com)



## VTLIB Beanstack Resources

<https://libraries.vermont.gov/BeanstackSRP2020>

# ACCESSING THE APP

## Accessing the App

1. Open the App Store or Google Play Store.
2. Search for "Beanstack Tracker" and download.
3. Click on "Get started."
4. Search for your library's name.
5. Log-in or create an account.
6. Participate!

