BROWN

Namecoach for Events and Ceremonies

hong chau - 2023-07-03 - Comments (0) - Namecoach

> **Note:** Namecoach allows students to record and indicate the phonetic pronunciation of their name. Departments and programs can use Namecoach for Commencement ceremonies and other events by submitting an access request form with OIT.   If you have questions about the service, please email Digital Learning Design at dld@brown.edu.   Information can also be found at the vendor's site.

Getting Started with a Namecoach Name Page:

1. Request a Namecoach admin account and Name Page
2. Log in to name-coach.com using the credentials emailed to you from **noreply@namecoach.com.** From the dashboard, you'll see the Name Page for your event.
3. Click on **Go** for your department/program

Reviewing Recorded Names, Unrecorded Names, and Names Requested links:

- **Recorded Names:** a list of completed form submissions that include audio files, personal notes from students, and a column for administrators to make internal notes. Email re-recording requests, archive or delete student records to update the final list.
- **Unrecorded Names:** a list of students who may have started the form submission process, but did not record an audio pronunciation
- **Names Requested**: a list of students without an audio recording or phonetic pronunciation

| Recorded Names | Unrecorded Names | Names Requested | Request Names/Your Link | Admin |

Customizing Name Event Page and Sender Email:

1. Click on the **Admin** tab for your Name Event Page

- **Invite** other administrators
- Update **Participant** records without sending notifications to students
- Update **Preferences** to customize the "Sender" email field.
  - Change the "**Notification sender**" field to your departmental address or
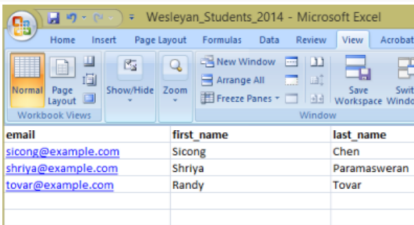
administrator's address.

- Customize a preface welcome message for students when they see the NameCoach recording page.
- Make form fields optional or hidden (i.e. hide Middle name or Phonetic field.)
- Enable the option to remind students to record their name within 7 days of the event.
- Add custom fields to the recording page.

Sending Mailmerge Invitations:

1. **Create** a new Excel or Google spreadsheet
2. Include in the first row the columns "**first_name**", "**last_name**", "**email**"
3. **Copy/paste** First names, Last names, and Emails into this template file. Email is the only required field for the mailmerge to work.
4. **Save** the Excel file on your computer.
5. **Return** to the Name-coach.com event page in your web browser.
6. Click the **Request Names/Your Link** tab in your event page to import the **.csv/.xls** file.
7. Click on the **Upload Excel/CSV** button
8. Click on the **Import and Notify** button
9. Update and edit the **Email Body** and click **Save message**
10. Click the **Browser/Choose File** option to locate the Excel document on your computer
11. Click **Import and send invites** to send students the email message with a link to record their names, indicate pronouns, and enter phonetic pronunciations
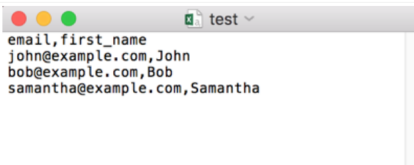12. **Review** the Recorded Names, Unrecorded Names, and Names Requested tabs for updated information.

Formatting Requirements for Excel or CSV file:

- First row should be a header row
  - **Required headers:**
    - 'email'
    - 'first_name' or 'last_name'
  - **Optional headers:**
    - 'first_name' if 'last_name' was included
    - 'last_name' if first_name was included
    - 'middle_name'
    - 'institution_id'
- Every row (except header row) should contain a valid email address, under the 'email' header (no blank rows allowed)
- Emails should not contain blank spaces.
- Allowed file extensions:
  - .xls
  - .xlsx
  - .csv
- You can import and export custom attribute values for your students as well. NamePage Custom Attributes is a screencast introducing you to this feature. People have used this feature to capture all kinds of different things, including:
  - Commencement walking order
  - Student degree levels
  - Student schools

Example: Excel file with email, first_name, and last_name

Example: CSV file with email and first name

Import and Notify