

Names in Engage for Administrators

Article Number

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Information

Engage offers a variety of name fields for each user, allowing users autonomy over how their name is represented in Engage while maintaining access to legal name fields for campus administrators. These fields are:

- **Name:** If the user has provided a name, that name will display here. If the user has not provided a name, the institution-provided name will appear. [A student can update their Name following these steps.](#)
- **Institution-Provided Name:** A campus can supply name details to pre-populate account names through authentication or a [user import](#). If the student provides their own name, that will overwrite the institution-provided name for display purposes in Engage, but the data remains available to administrators with community-wide access to Users.
- **Legal Name:** These are optional fields the campus can import that will only be visible in the [User List](#) for administrators with community-wide access to Users. If a user has not identified their own Name, and the campus has not identified an institution-provided name but has provided a legal name, this name will display.

Depending on the fields the campus and the user provides, their Name may display differently across the site:

<i>"Name"</i>		Abbie Miller	Abbie Miller
<i>Institution-Provided</i>	Abbie Block	Abbie Block	Abbie Block
<i>Legal Name</i>	Abigail Block	Abigail Block	Abigail Block

What appears? Institution-Provided and Legal Name fields will always be accessible to administrators with community-wide user's access through the User List, but across all other areas of Engage, the "Name" that a student provides or confirms is what is shown.

Read on for more information on the following topics related to Names in Engage:

- Setting up Names in Engage
- Seeing a Student's Institution-Provided or Legal Name
- Changing a Student's Name
- Using Legal Name on the Co-Curricular Transcript
- Considerations for Engage Integrations

Setting Up Names in Engage

We recommend campuses use account imports, either [manually](#) or through [automated SFTP](#), dependent on contract terms, in order to maximize use of tools such as attendance tracking and form reviewers. Account imports are also the best way to input additional details into Engage such as demographic information for use in reporting. Account imports are also used to identify the name(s) associated with a user.

If using our pre-2019 account import template, the "First Name" and "Last Name" fields will actually populate the "Legal Name" fields and "Preferred Name" will populate the institution-provided name fields. This allows preferred names to display rather than legal names when they are available.

When using our new import template, notice the template includes both the Institution-Provided name fields and Legal Name fields. We suggest using a Preferred Name to populate the Institution-Provided name fields if applicable to ensure a positive log-in experience for users who have already changed their name preferences in other systems.

Institution-Provided Names populated via account import will override names provided via authentication in the Institution-Provided Name field. This means that if a name field is changed in the account import file, that change will be reflected in the Institution-Provided Name field. However, note that if a user has already confirmed their Name, no import will update it.

Seeing a Student's Institution-Provided or Legal Name

If a user identifies their own name, that name will appear in place of any name the campus has provided in nearly all areas of Engage. The institution-Provided name and legal name will still be visible in the [User List](#) for administrators with Users:View limited community access and administrators with full community access. Navigate to the *Admin* area of the site, choose the "Users" drop down, and select "user list." You can search this page by any of the user's multiple names. On the student's profile, select the button to expand the name list.

The screenshot shows a user profile for 'Abbie Block'. At the top, there are two buttons: '< Users List' and 'Archive User'. Below this is the 'User Details' section, which has a tabbed interface with 'Profile' selected. Under the 'Profile' tab, there is a 'Name' field containing 'Abbie Block' and a description: 'The name the user has self-identified or confirmed via their profile'. Below the name field is an 'Other Names' section with a dropdown arrow. The 'Identification' section contains several fields: 'Username' (AbigailBlock), '* Campus Email' (abigailblock@engageu.edu), 'Preferred Email' (empty), 'Suffix' (empty), 'Card ID' (1502854), and 'SIS ID' (888595) with a 'Last Updated: 2/23/2017' timestamp.

Changing a Student's Name

Although the vast majority of students use the Name tool to responsibly reflect genuine names they use in daily life, there may be cases where a user has misused this tool and their Name needs to be changed. Additionally, if a student updates their name on your student information system and they have already set a name in Engage, their institution-provided name will be updated, but their Name will stay what they have

changed it to in Engage. In some of these cases, it may be desirable to re-set the Name field to revert to displaying institution-provided information.

Names are not over-written by account imports: if a name has been identified directly by the student upon login or under the user profile, an account import will not overwrite it. Instead, as an administrator you can directly reset that user's name to return to the institution-provided name fields.

Note that if a student has *not* edited their name, an account import to updating institution-provided name *will* reflect on the student's Name on Engage. It is only if a student has edited their Name that account imports will not automatically update them.

To revert a student's elected Name to their institution-provided name, navigate to the *Admin* area of the site, choose the "Users" drop down, and select "user list." On the student's profile, select the button to expand the name list. Click "Reset" next to Name and this will change the individual student's name to the institution-provided name for the student.

If the "reset" button does not appear on this page under the drop down, that student has not yet edited their name in any way from the institution-provided data.

Using Legal Name in the Co-Curricular Transcript

Some campuses may need to use Legal Name instead of a student's self-identified Name on the Co-Curricular Transcript due to institutional policy. When pulling the co-curricular transcript, an Administrator can select any name on record to be listed on the transcript, including legal name.

Considerations for Engage Integrations

- Engage will not update or reflect updates to names in Core Data. We consider names in a student engagement system to be separate of record from other systems. To update an institution-provided name, use a user import - updates in Core Data will not be reflected in Engage.
- Campuses using the Panels Baseline integration feature will see Institution-Provided names and not necessarily a student's name as listed in Engage. This allows for more quick cross-referencing with non-Engage formed panels and resources.
- Campuses using the Insight platform will see names reflected as determined in Core Data, not as determined in Engage. Insight identifies the user by their username and affiliates that information with their Core Data account records, not by the demographic or name information stored in Engage.

KB Product

Engage

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