

Homeroom Dashboards - Data Admin: Impersonation and Validation

IMPERSONATION and VALIDATION

Impersonation and Validation are powerful tools to be used by Data Admins in the Homeroom Dashboards. The following Help Article explains the features in each.

IMPERSONATION

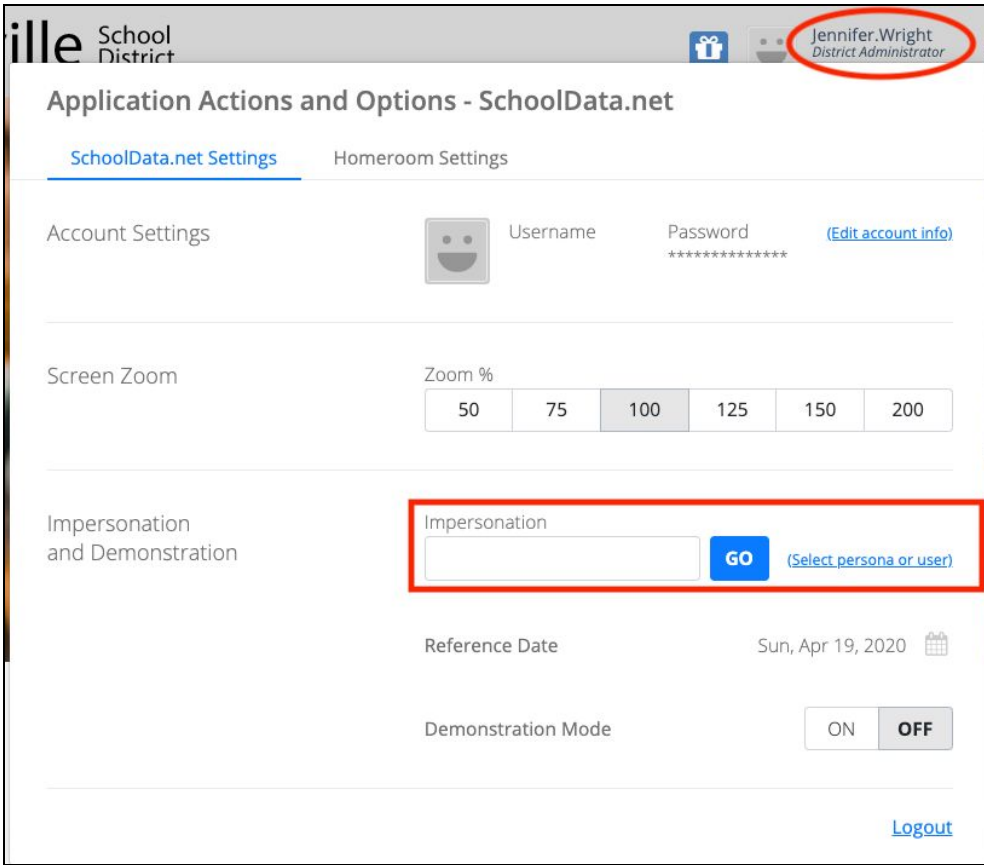
Impersonation allows the Data Admin to experience the application as a specific user does. This allows the Data Admin to better train users as well as provide specific user troubleshooting.

One of the most important things to understand in Homeroom Dashboards is that what you see depends on your user role and granted permissions. District Admin in the system with access to all students district wide, will see something very different than a teacher level user who only has permission to access their own student's data, or a HS Principal viewing the High School Principal Dashboard. In order for you to truly interact with the system as a user would, you need to impersonate the level of user you'd like to engage the system as. **It is very important that impersonation is utilized when viewing Dashboards so that you can truly see what the specific user will see in their Dashboards when they log in.**

Impersonation options were increased with the February 2019 release and modified in the April 2019 and February 2020 release.

The Impersonation Role must be assigned to a user through the Homeroom Admin module in the Admin application. If you need help adding the role to individuals, please contact support@schooldata.net.

Once the role has been assigned, impersonation will become an option in the drop down menu associated with your name in the upper right hand corner of the screen.



The Impersonation section allows you to:

1. Type in a user name and then select GO, or
2. Select from a list of personas or users.



“Select persona or user” gives the user two options.

Under Application Users, you are presented with a list of users and their roles. Note that you can filter using the gear or searchable text boxes to find a specific user to impersonate.

Select a User or Persona to Impersonate

Persona Aliases Application Users

Application Users (1659 records)

| Application User | Person | Is Teacher | Is Specialist | Is School Administr | Is District Administr |
|-------------------------------------|------------------------|------------|---------------|---------------------|-----------------------|
| <input type="text"/> | Garman*, Clany | | | | |
| <input checked="" type="checkbox"/> | Reigers*, Ingrid | | | true | |
| <input checked="" type="checkbox"/> | Bradstreet*, Jean | | | | |
| <input checked="" type="checkbox"/> | Reinert-Osuji*, Anton | | | | |
| <input checked="" type="checkbox"/> | Higgins-O'Brien*, Jori | true | true | | |
| <input checked="" type="checkbox"/> | Kokinda*, Jennifer | | true | | |
| <input checked="" type="checkbox"/> | Fritts*, Mone'T | | true | | |

Clicking the check mark on the left will then reload the dashboard and you will be seeing that specific user.

| | | | | | | |
|-------------------------------------|----------------------|--------------------|--|------|--|--|
| <input checked="" type="checkbox"/> | <input type="text"/> | Kokinda*, Jennifer | | true | | |
|-------------------------------------|----------------------|--------------------|--|------|--|--|

Selecting a Persona Alias allows you to select a type of individual without knowing a specific user. Again selecting the check mark on the list will then reload the dashboard.

Select a User or Persona to Impersonate

Persona Aliases
Application Users
✕

Impersonation Personas (48 records) ⚙️

| Persona | Alias |
|--|--|
| <input type="text"/> <input checked="" type="checkbox"/> MiddleSchool Teacher | <input type="text"/> MiddleSchool.Teacher |
| <input type="checkbox"/> Secondary Teacher | Secondary.Teacher |

When you are impersonating, the application indicates that you are in impersonation mode by showing you a “secret agent” icon next to the user name displayed in the upper right hand corner of the screen.



Once in Impersonation mode there are two options - to stop impersonating or impersonate a new user..

1. To impersonate a new user, return to the Impersonation menu option and type in a new user name or select another user/persona.

Impersonation and Demonstration

Impersonation

GO
[\(Select persona or user\)](#)

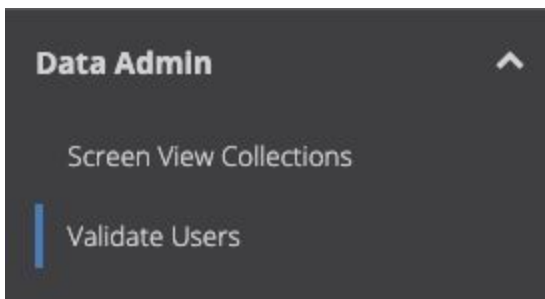
2. To stop Impersonating and return to your account, click on the “Secret Agent” icon at the top right; this will stop the impersonation.



VALIDATE USERS

Validation provides an additional way to impersonate and also enables you to verify which dashboard users have set as their default. The difference from Impersonation is that validation allows you to directly access a dashboard for a specific user, which may save you clicks. The only users that have access to Validation are those with the Data Admin role.

Under Data Admin in the Left Navigation menu select Validate Users



You will be presented with a list of users. You can sort and filter the list to find a specific user.

DATA ADMIN
Validate Users

Data Table for User Validation (1659 records)

| Name | Application User | Is Teacher | Is Specialist | Is School Admin | Is District Admin | Default Dashboard | District Admin Dashboard |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|---|--|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Ent'E*, Lyndie | | | true | | | Elementary Specialist Dashboard - SDS | District Admin Dashboard |
| Kimbrough*, M... | | | true | | true | District Admin Dashboard - SDS | District Admin Dashboard |
| Ireland*, Camryn | | | true | | | | |
| Hutton*, Cordell | | | | | | | |
| Kanikkeberg*, ... | | | true | | | | District Admin Dashboard |
| Guillen Flores*, ... | | | | true | | Elementary Principal Dashboard - SDS | District Admin Dashboard |
| Thramer*, Lynae | | | true | | true | District Admin Dashboard - SDS | District Admin Dashboard |
| Teske*, Delano | | | | | | | District Admin Dashboard |

Once you have found the specific user to validate, scroll to the right to see all the dashboards available to the user. Click on any of the dashboard links to go directly to that dashboard for that user.

Us

ing the sort and filter tools in this table, you can verify that groups of users or even individuals are associated with the the expected default dashboard.

| Name | Application User | Default Dashboard | District Admin Dashboard | High School Principal Dashboard | High School Spec |
|----------------|------------------|---------------------------------------|--------------------------------|---------------------------------|----------------------|
| Ent'E*, Lyndie | | Elementary Specialist Dashboard - SDS | District Admin Dashboard - SDS | | High School Speciali |

Once you have completed your work with that user/dashboard, you can:

1. Return to the Validate Users link to surface the list again for selection.
2. Stop Impersonating and return to your account by clicking on the "Secret Agent" icon at the top right of the screen, next to the user name.

