



Insights Discovery for Microsoft Teams

Setup guide



Setup

Item	Details
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Owner	Product Team
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Version	Date	Description of Changes
1.0	21 st November 2025	First published version
1.1	11 th March 2026	Updated app permissions, configuration steps and FAQs
1.2	12 th May 2026	Added Teams UPN/email limitation
1.3	3 rd July 2026	Removed Security section as this has been given its own guide

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This guide is for whoever administrates a Microsoft Teams account, usually an IT team, to install the app for an organisation via the Microsoft Teams admin centre. We also ask that it be pinned to the navigation menu (for visibility) and, if necessary, restricted to specific users.

We use the app ourselves internally and have in-depth knowledge of this setup process.

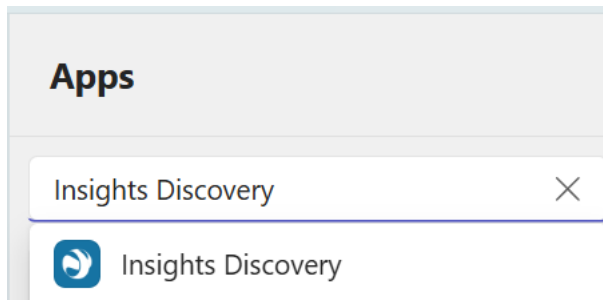
Representatives from our internal IT team are on hand to answer technical questions you may have.

Please email msteams@insights.com with any technical queries and we'll get back to you as soon as possible.

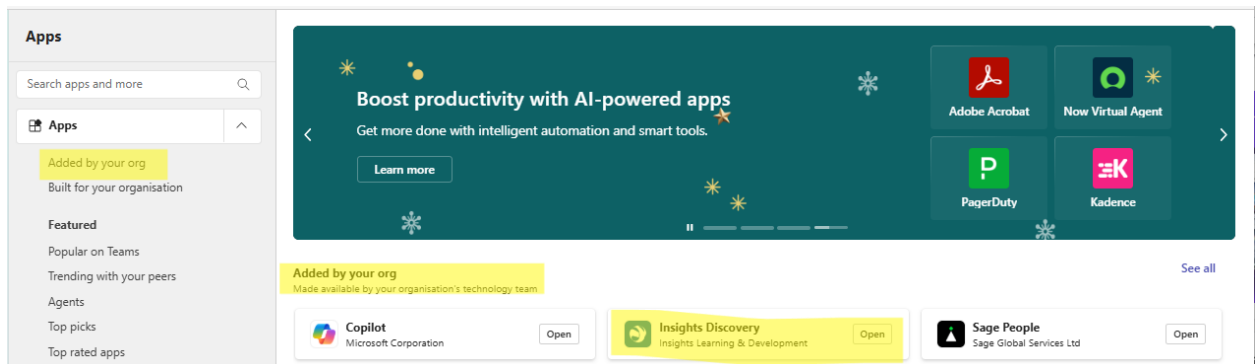
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How to add the app to Microsoft Teams

1. Head to the [Microsoft Teams Admin Centre](#).
2. Search and install the “Insights Discovery” app on Microsoft Teams – when searching, you should see a result labelled “Insights Discovery” with the Insights logo as its icon. You can also [install it directly from the store here](#).



3. Once you have downloaded ‘Insights Discovery’, it should appear under ‘Apps – Added by your org’

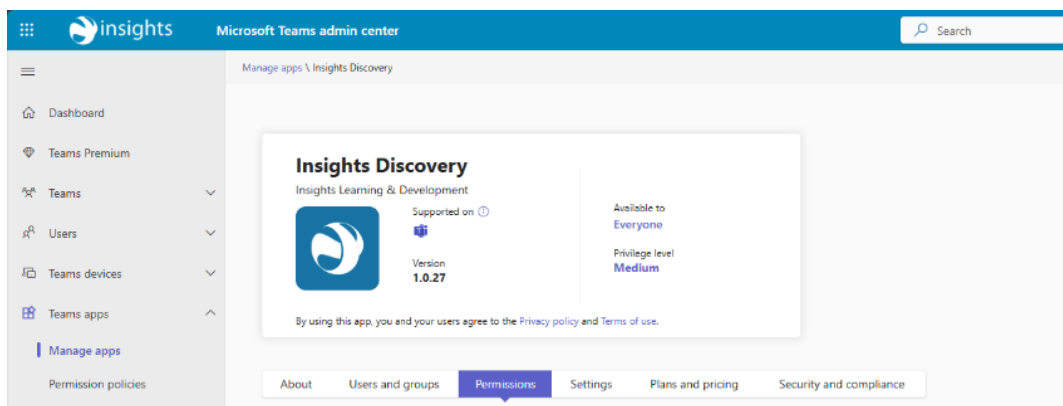


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Permissions in Microsoft Teams Admin Centre

To ensure the app can operate inside Teams, admin consent will need to be granted:

1. Access the **Microsoft Teams Admin Centre** and locate the navigation menu on the left-hand side of the dashboard
2. From here, click on the **Teams apps** option and select **Manage apps**



3. Search for **Insights Discovery**
4. Select the app

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5. Grant admin consent for all required permissions

The screenshot shows the 'Permissions' page in the Microsoft Teams admin center. The left-hand navigation menu includes 'Teams devices', 'Teams apps', 'Manage apps', 'Permission policies', 'Setup policies', 'Customize store', 'Agent settings', 'Meetings', 'Voice', 'Teams client health', 'Locations', 'Frontline manage...', 'Policy packages', 'Planning', 'Analytics & reports', and 'Notifications & ai...'. The main content area shows the 'Permissions' tab selected, with the overall privilege level set to 'Medium'. Below this, there is a section for 'Required permissions' with a yellow banner that says 'Review and grant admin consent for the permissions required to use this app.' and a red-bordered button labeled 'Grant admin consent'. A table lists the required permissions:

Name	Description	Access	Privilege Level	Type
profile	Allows the app to see your users' basic ...	Delegated	Low	Entra ID
offline_access	Allows the app to see and update the d...	Delegated	Low	Entra ID
User.Read	Allows users to sign-in to the app, and a...	Delegated	Low	Entra ID
openid	Allows users to sign in to the app with t...	Delegated	Low	Entra ID
email	Allows the app to read your users' prima...	Delegated	Low	Entra ID
TeamsActivity.Send	Allows the app to send new activities to ...	Application	Medium	Entra ID

For more information on granting and managing consent to Teams app permissions, see [here](#).

6. Locate the navigation menu on the left-hand side of the dashboard
7. From here, click on the **Teams apps** option and select **Permission policies**
8. Select the policy assigned to your users (for example, Global (Org-wide default))
9. Ensure the Insights Discovery app is "Allowed" and save any changes.

Note: If the app is blocked in a permission policy, users will not be able to access it even if the app itself is allowed – [see here for full instructions](#).

10. Wait for changes to apply as it may take up to several hours to show across Microsoft Teams.

Note: Allowing an app makes it available for deployment but does not automatically install it for users. App deployment is managed separately using setup policies.

Restricted User Permissions

If allowing access to all Microsoft Teams users, navigate to the "Setup policies" area and update the global setup policy to include the "Insights Discovery" app – [see here for full instructions](#).

If you want to restrict access to the app for a select group of Microsoft Teams users, do the following:

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- a. Navigate to “Permissions policies” area of the Microsoft Teams administration centre.
- b. Create a global policy that blocks the Insights Discovery app for all users – [see here for full instructions](#).
- c. Create a custom application policy that unblocks the Insights Discovery app and assign that policy to the specific users you want to have access – [see here for how](#).
- d. Navigate to the “Setup policies” area of the Microsoft Teams administration centre.
- e. Create a new policy based on the global setup policy, select “User pinning” and add the “Insights Discovery” app.
- f. Pin the app to the app bar in Microsoft Teams by adding the Insights Discovery app to the “Pinned apps” setup policy – [see here for help](#).

After some time (due to caching it may take a day or two), users will begin to see “Insights Discovery” appear as an option in the Microsoft Teams navigation menu.

Permissions in Microsoft Entra Admin Centre

To control what the app is allowed to access in Microsoft 365 / Entra on behalf of users/itself, identity and API permissions will need to be granted:

1. Go to [Microsoft Entra Admin Centre](#)
2. Open **Enterprise applications**
3. Search for ‘Insights Discovery’ and open the app
4. Go to **Permission / API Permissions** and ensure the Microsoft Graph permissions (see [list of permissions](#)) are granted
5. Click ‘Grant admin consent’ for your organisation if any of these are not yet consented

Enable access to the app

Once permissions have been configured, access to the app must be enabled by **Insights**. Until access is enabled, users attempting to open the app will see a “Your organisation hasn’t set up the right permissions” error message.

Note: App permissions can be configured either before or after this step, but the app will not function until access has been enabled.

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Insights use your Microsoft tenant ID to enable access to the app. We've implemented a system that checks a tenant ID exists in a record and then allows an organisation to access the relevant profile data on our practitioner platform.

Using the app

The User Guide provides step-by-step instructions for IT administrators, practitioners, and learners, covering setup, importing profiles, explaining features, and troubleshooting common issues.

You can access the User Guide [here](#).

Known Limitation: Email Address Mismatch

IMPORTANT:

At present, the app requires the user's **Microsoft Teams account email address / UPN (User Principal Name)** to exactly match their **work contact email address**.

There is currently no workaround or fix available if these email addresses do not match.

When the user's work contact email address does **not** match the user's **Microsoft Teams account email address / UPN (User Principal Name)**:

- The user can import their profile **only after** updating their email address in the *Insights New Customer Platform* to match their Microsoft Teams account email.
- The user will be able to:
 - View their personal dashboard
 - Use the Avatar tab
- The user will **not** see any profile information (including their own) when the app is added to a meeting chat or group chat.

If you experience any issues, please reach out to msteams@insights.com.

Microsoft recommends aligning a user's UPN (User Principal Name) with their primary work email address. Many Microsoft 365 services, including Microsoft Teams and Entra ID-integrated applications, assume that a user's sign-in identity and email address are the same – [see here for Microsoft documentation](#).

While it is technically possible for these values to differ, Microsoft does not advise this configuration unless required, as it can lead to authentication limitations and reduced functionality across applications.

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App requested permissions

API name	Claim value	Permission	Type	Usage
Microsoft Graph (30)	AppCatalog.Read.All	Read all app catalogs	Delegated	To retrieve the ID of the Insights Discovery Teams App as listed in the Teams App Catalog. We use this to: <ul style="list-style-type: none">Retrieve the ID of the Insights Discovery app in the app catalog to be able to install the app to meeting chats.
"	Calendars.Read	Read user calendars	"	To retrieve events and Teams meetings in the signed-in users' calendar. We use this to: <ul style="list-style-type: none">Display a list of upcoming Teams meetings for the signed-in user in our Insights Discovery Teams App dashboard, where it can display the average Colour Energy of all meeting attendees.
"	ChannelMember.Read.All	Read the members of channels	"	To retrieve members of a channel in order to display the relevant Insights profile information for comparison and communication tips.
"	Chat.ReadBasic	Read names and members of user chat threads	"	To retrieve chat information, including a list of chat members, in order to display the relevant Insights profile information for comparison and communication tips. We use this to: <ul style="list-style-type: none">Retrieve the list of members of a Teams Chat (e.g. Meeting Chat) in order to display the Insights profile information for each of those chat members.
"	People.Read	Read users' relevant people lists	"	To retrieve a list of people in meeting rooms.

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API name	Claim value	Permission	Type	Usage
"	Presence.Read.All	Read presence information of all users in your organisation	"	<p>To retrieve and display availability information about a user that is not the signed-in user. We use this to:</p> <ul style="list-style-type: none">• Display information about a user's presence (e.g. online, offline, away status) within the Insights app tab.
"	TeamsAppInstallation.ReadWriteSelfForChat	Allow the Teams app to manage itself in chats	"	<p>To allow installation of the Insights Discovery Teams App to a user's chat, and allow listing of apps installed to a chat to check if it is installed. We use this to:</p> <ul style="list-style-type: none">• Allow users to add the Insights tab to a meeting chat from the Dashboard meeting cards (by clicking 'Add tab to view colour energies'). This permission allows for installing the app to a chat.

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API name	Claim value	Permission	Type	Usage
"	TeamsTab.Read.All	Read tabs in Microsoft Teams	"	<p>To retrieve all tabs for a chat (including meeting chats). We use this to:</p> <ul style="list-style-type: none"> • Check if an Insights Discovery App tab already exists for a meeting • Retrieve the ID of the tab if it does exist, to allow users to navigate directly to the Insights Discovery app tab from the Dashboard Meeting Card
"	TeamsTab.ReadWriteForChat	Allow the Teams app to manage all tabs in chats	"	<p>To add the Insights Discovery Teams App tab to a chat. We use this to:</p> <ul style="list-style-type: none"> • Allow users to add the Insights tab to a meeting chat from the Dashboard meeting cards (by clicking 'Add tab to view colour energies')
"	User.ReadBasic.All	Read all users' basic profiles	"	<p>To get basic profile information for users that are not the signed-in user, such as their profile image and email. We use this to:</p> <ul style="list-style-type: none"> • Display user profile images in the Insights Chat Tab, and link their user information to their Insights Profile in order to display that information in the Chat Tab.

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API name	Claim value	Permission	Type	Usage
"	User.ReadWrite	Read and write access to user profile	"	<p>To allow Insights to update the signed-in user's profile information.</p> <p>We use this to:</p> <ul style="list-style-type: none">• Enable the signed-in user to update their profile photo through the 'Avatar' tab in the Insights Discovery app, which adds the user's Insights profile colour energies to the profile image.