



Insights Discovery for Microsoft Teams

# User guide



# MS Teams User guide

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This guide supports IT teams with the initial setup, while also providing guidance for practitioners who administer Insights Discovery and end users who interact with the Insights Discovery for Microsoft Teams application.

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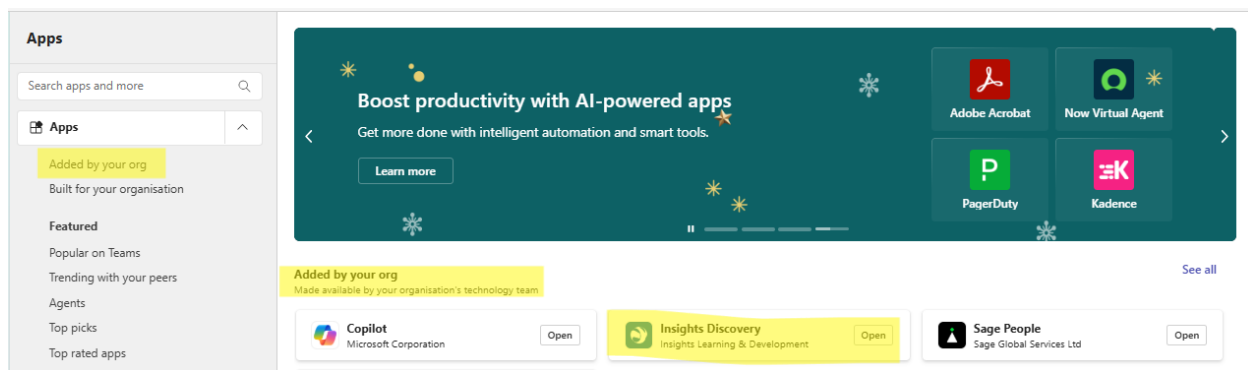
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## How to add the app to Microsoft Teams

*This will have to be done by your IT team or Microsoft administrator.*

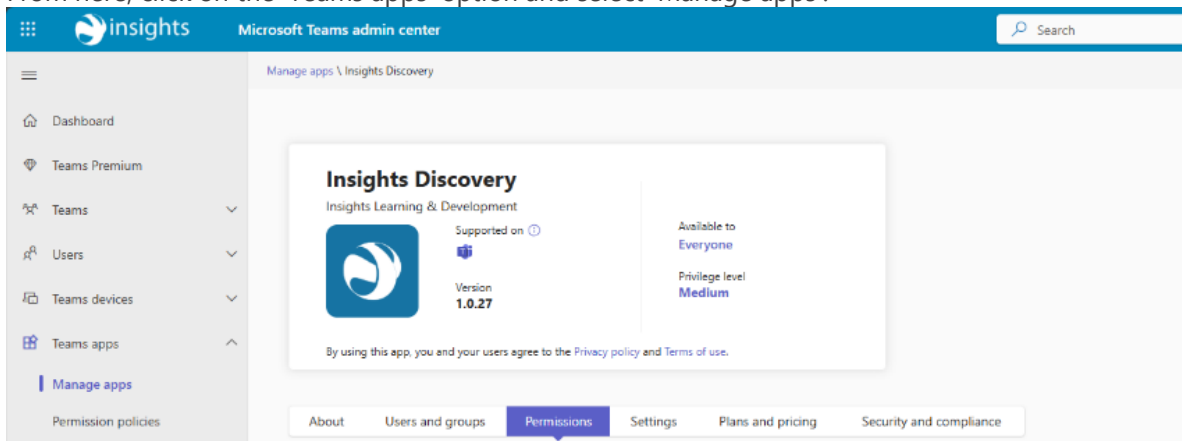
1. Download 'Insights Discovery' app from the [Microsoft Teams Admin Centre](#).
2. Once you have downloaded 'Insights Discovery', it should appear under 'Apps – Added by your org'



## App Permissions

*This will have to be done by your IT team or Microsoft administrator.*

1. Access the Microsoft Teams Admin Center 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'

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4. Select the app
5. Grant admin consent for all required permissions

This app's overall privilege level: Low Medium High

**Required permissions**

Review the required permissions for this app and grant admin consent for your org. When you grant consent for delegated permissions, this app can act on a user's behalf when they're signed in. Application permissions allow this app to access the relevant info and act without a user present. [Learn more about the permissions and admin consent.](#)

Review and grant admin consent for the permissions required to use this app. [Grant admin consent](#)

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](#).

For the full permissions list, please refer to the [setup guide](#).

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The screenshot shows the Microsoft Teams admin center interface. The left sidebar contains navigation options like Dashboard, Teams Premium, Teams, Users, Teams devices, Teams apps, and Manage apps. The main content area is titled 'Manage apps \ Insights Discovery'. It features a card for 'Insights Discovery' with a version of 1.0.27 and a medium privilege level. Below the card, there are tabs for 'About', 'Users and groups', 'Permissions', 'Settings', 'Plans and pricing', and 'Security and compliance'. The 'Permissions' tab is selected, showing a table of required permissions for the app.

Claim value	Name	Access	Privilege Level	Type
TeamsAppInstallation.ReadW	Allow the Teams app to manage itself in...	Delegated	Low	Entra ID
ChannelMember.Read.All	Read the members of channels	Delegated	Low	Entra ID
Calendars.Read	Read user calendars	Delegated	Low	Entra ID
TeamsTab.Read.All	Read tabs in Microsoft Teams.	Delegated	Low	Entra ID
Presence.Read	Read user's presence information	Delegated	Low	Entra ID
AppCatalog.Read.All	Read all app catalogs	Delegated	Low	Entra ID
Chat.ReadBasic	Read names and members of user chat t...	Delegated	Low	Entra ID
Presence.Read.All	Read presence information of all users i...	Delegated	Medium	Entra ID
User.Read.All	Read all users' full profiles	Delegated	Low	Entra ID

6. Go to Teams apps → Permission policies
7. Select the policy assigned to your users (for example, Global (Org-wide default))
8. Ensure the 'Insights Discovery' app is Allowed and save any changes.

*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.*

9. 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.*

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## User Permissions

*This will have to be done by your IT team or Microsoft administrator.*

### Setup Policies

1. Go to Teams apps → Setup policies
2. Select an existing setup policy or create a new one
3. Under Installed apps, add 'Insights Discovery'
  - a. (Optional) Under Pinned apps, pin 'Insights Discovery' to the Teams app bar – see [here](#) for full instructions.
4. Assign the setup policy to users or user groups. This ensures the app is automatically installed and/or visible for users in Microsoft Teams – see [here](#) for full instructions.

### Restricted User Permissions

1. Go to Teams apps → Permission policies
2. Select an existing policy – like Global (Org-wide default) – or create a new policy by selecting 'Add'
3. Name the policy (for example: Marketing App Access)
4. Under 'Allowed apps', you can:
  - a. Select 'Allow all apps (default)'
  - b. Or choose 'Allow specific apps and block all others'
5. Search 'Insights Discovery' and add it to the list
  - a. Block other apps if necessary

*This ensures that only the apps you specify are available to users assigned to this policy.*

6. With the policy selected, choose 'Manage users'
7. Click 'Add users'
8. Search for and select the individuals or groups you want to restrict access to
9. Confirm your selection

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a. Only the users assigned to this policy will be able to use Insights Discovery.

10. Ask assigned users to restart Teams if the app does not appear immediately

a. Changes can take up to 24 hours to update fully.

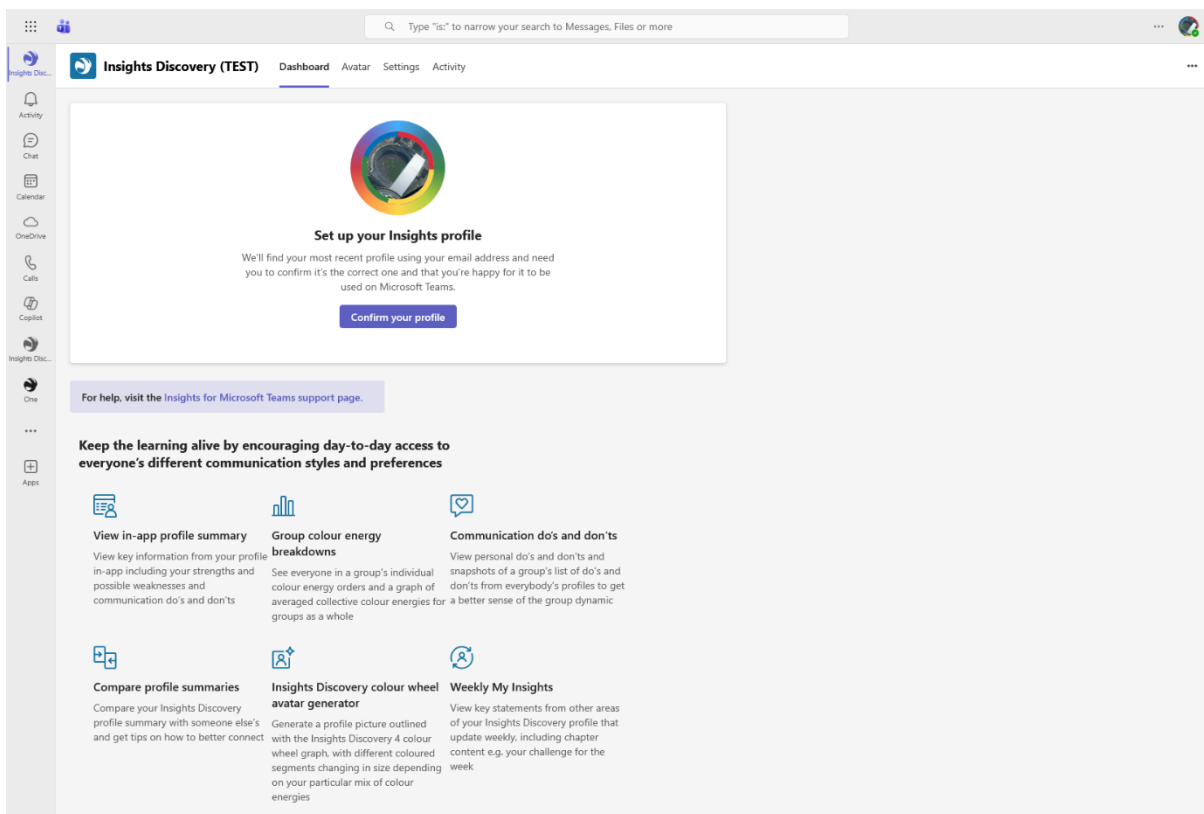
See [here](#) for further information from Microsoft on using app permission policies to control user access to apps.

## Profile Import

When 'Insights Discovery' is installed in your Microsoft Teams account:

1. Click on 'Insights Discovery' using the navigation pane on the left-hand side (if it does not appear, select 'Apps', search 'Insights Discovery' and select it).

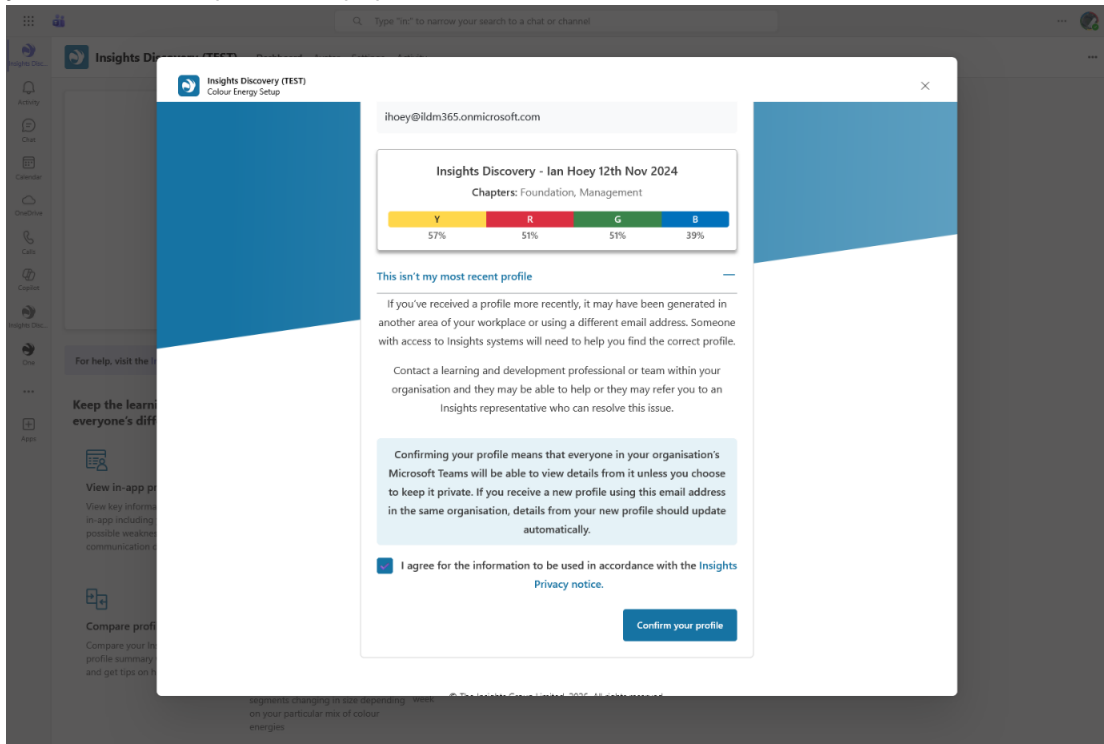
2. You will see this window



3. Click 'Confirm your profile'

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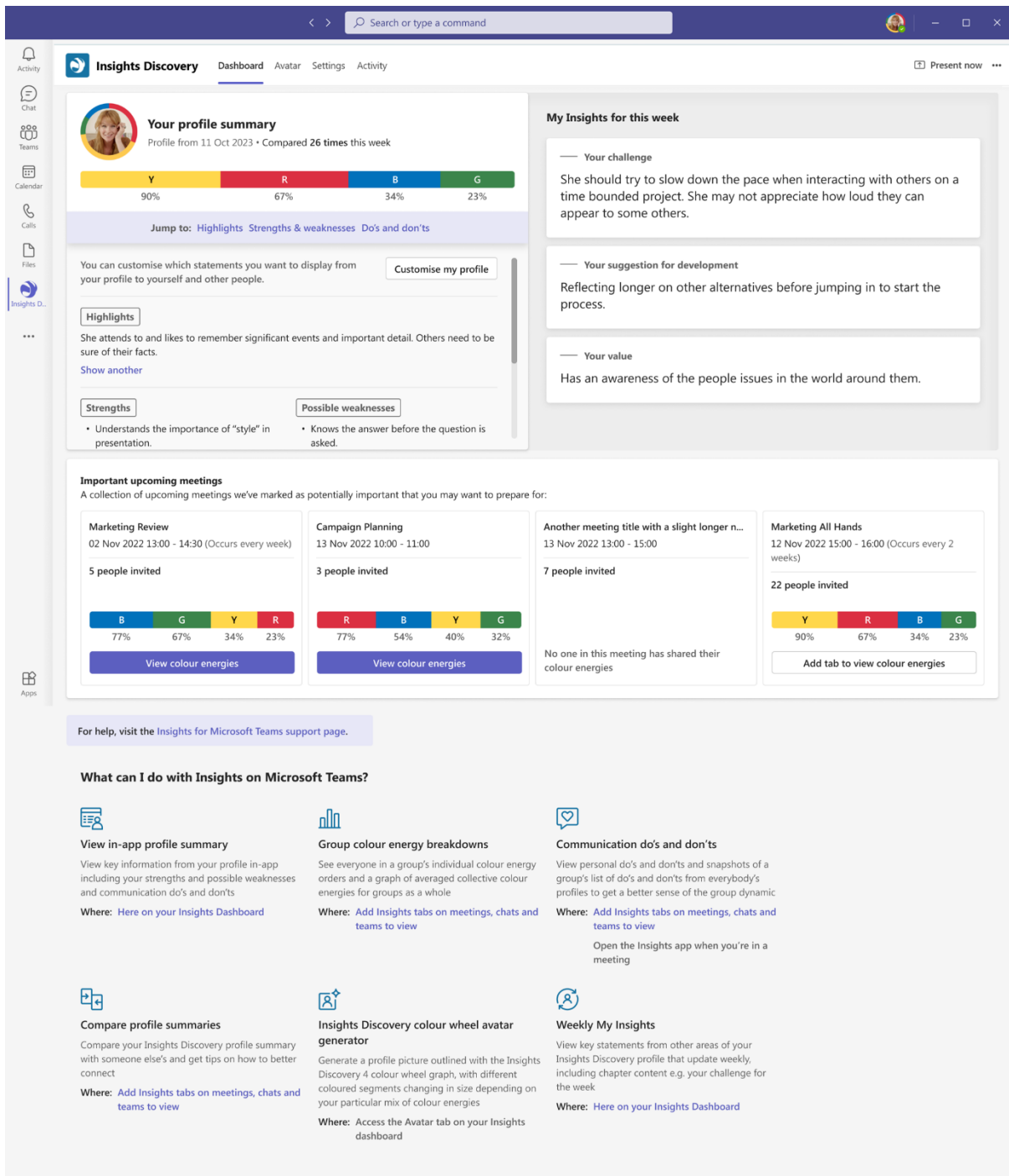
- If your Microsoft Teams account email matches the email address you used to receive your profile, your most recent profile will populate, as shown here



If your profile does not import, please refer to [Profile import issues](#).

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- Once you have confirmed your profile, you will see a dashboard that populates your profile information, as shown below.



## Profile privacy settings

- In your 'Settings' (accessed by clicking 'Settings' in the top navigation bar), you can decide:
  - Who can view elements of your profile (including your colour energy order)

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b. What type of meetings appear in your dashboard

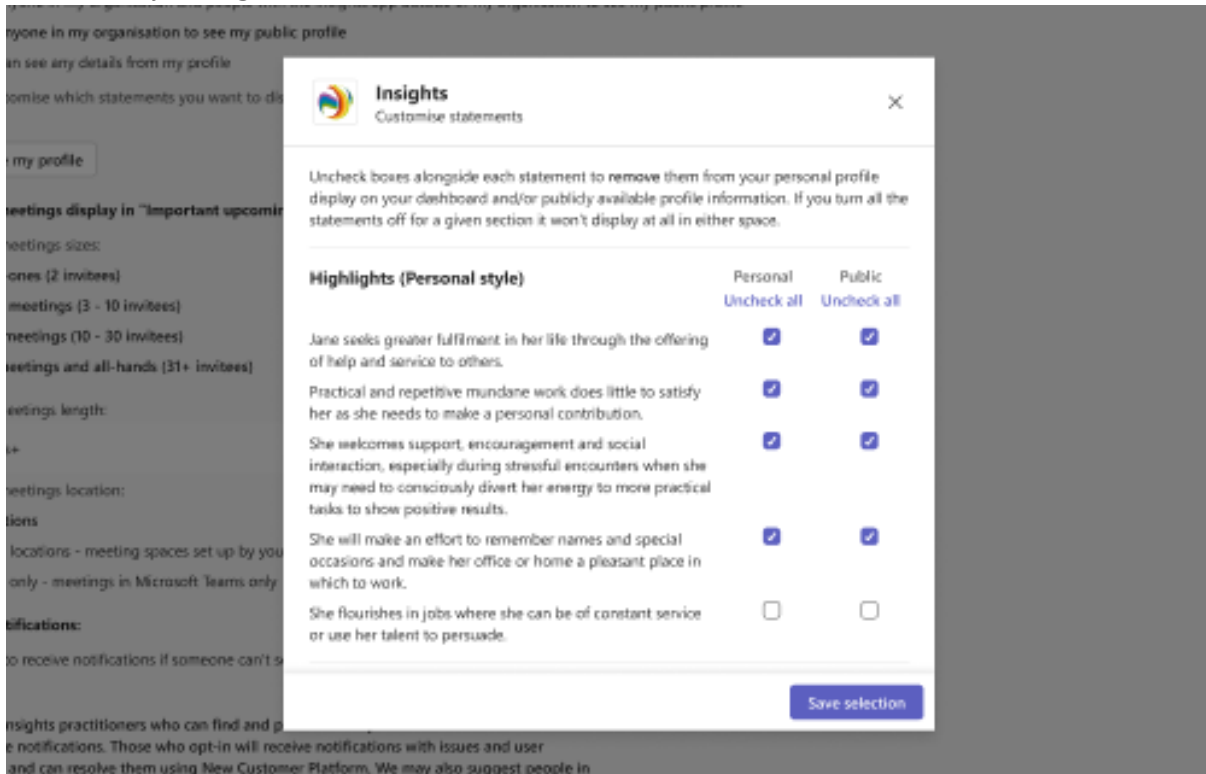
The screenshot shows the 'Insights Discovery' settings page. At the top, there are navigation tabs: 'Dashboard', 'Avatar', 'Settings' (which is selected), and 'Activity'. Below the navigation, the page is titled 'Set your profile view options:' and contains two radio button options: 'Allow anyone in my organisation to see my public profile' (which is selected) and 'Only I can see any details from my profile'. Below these options is a text prompt: 'You can customise which statements you want to display from your profile to yourself and other people.' and a button labeled 'Customise my profile'. The next section is 'Set which meetings display in "Important upcoming meetings" section:'. It includes 'Important meetings sizes:' with four checked checkboxes: 'One-to-ones (2 invitees)', 'Smaller meetings (3 - 10 invitees)', 'Bigger meetings (11 - 29 invitees)', and 'Large meetings and all-hands (30+ invitees)'. Below this is 'Important meetings length:' with a dropdown menu set to 'Any'. The final section is 'Important meetings location:' with three radio button options: 'All locations' (selected), 'Defined locations - meeting spaces set up by your organisation', and 'Remote only - meetings in Microsoft Teams only'. At the bottom of the settings area is a blue 'Save Settings' button.

2. In the same view as above (as well as from your Dashboard – screenshot below),

The screenshot shows the 'Insights Discovery' dashboard. At the top, there is a search bar with the text 'Search or type a command'. Below the search bar, there are navigation tabs: 'Dashboard' (which is selected), 'Avatar', 'Settings', and 'Activity'. On the left side, there is a vertical sidebar with icons for 'Activity', 'Chat', 'Teams', 'Calendar', 'Calls', and 'Files'. The main content area is titled 'Your profile summary' and features a circular profile picture of a woman. Below the profile picture, it says 'Profile from 11 Oct 2023 • Compared 26 times this week'. There is a horizontal bar with four colored segments: yellow (labeled 'Y' with 90%), red (labeled 'R' with 67%), blue (labeled 'B' with 34%), and green (labeled 'G' with 23%). Below this bar is a link that says 'Jump to: Highlights Strengths & weaknesses Do's and don'ts'. At the bottom of the dashboard, there is a text prompt: 'You can customise which statements you want to display from your profile to yourself and other people.' and a button labeled 'Customise my profile'.

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- You can click 'Customise my profile' to choose which statements from your profile are available to only you or others from your organisation.



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## Different scenarios of what you may see dependent on profile imports and privacy settings

- Scenario 1: Iain English and Ian Hoey both have Discovery profiles, Ian Hoey has not imported their profile

**Insights Discovery**

**Colour energy summaries**  
You can only compare profiles with people who also have Insights Discovery profiles.

Less Conscious  Conscious

**Iain English**  
Cool Blue  
Fiery Red  
Earth Green  
Sunshine Yellow

**Ian Hoey**  
Profile information not available

**Collective colour energies**  
Based on 1 out of 2 people

Energy	Percentage
Cool Blue	~55%
Fiery Red	~45%
Sunshine Yellow	~40%
Earth Green	~40%

**Communication Do's and Don'ts**  
From 1 out of 2 people's profiles - showing 6 at random, compare profiles to view individual do's and don'ts

**Do**

- Respect his values and principles. (Iain English: leads with Cool Blue)
- Respect his privacy. (Iain English: leads with Cool Blue)
- Organise your thoughts before communicating. (Iain English: leads with Cool Blue)

**Don't**

- Be misled by his apparent reticence into thinking that he doesn't care. (Iain English: leads with Cool Blue)
- Call on him when uninvited. (Iain English: leads with Cool Blue)
- Try to rush him into a decision. (Iain English: leads with Cool Blue)

Show 6 more

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- Scenario 2: Iain English and Ian Hoey both have Discovery profiles and both confirm privacy settings as open

The screenshot displays the 'Insights Discovery' application window. At the top, it shows the 'Colour energy summaries' for two users: Iain English (IE) and Ian Hoey (IH). Iain English's profile is associated with Cool Blue, Fiery Red, Earth Green, and Sunshine Yellow. Ian Hoey's profile is associated with Sunshine Yellow, Fiery Red, Earth Green, and Cool Blue. A 'Compare profiles' button is visible below the summaries. A toggle switch for privacy settings is set to 'Conscious'.

The 'Collective colour energies' section shows a bar chart based on 2 out of 2 people. The chart displays the following data:

Colour	Percentage
Cool Blue	50%
Fiery Red	50%
Sunshine Yellow	50%
Earth Green	50%

The 'Communication Do's and Don'ts' section provides advice based on 2 out of 2 profiles. It lists six items:

- Do:** Ensure that your statements are accurate and factual. (Iain English: leads with Cool Blue)
- Do:** Use humour in moderation. (Ian Hoey: leads with Sunshine Yellow)
- Do:** Remember to ask for his opinions of other systems and projects. (Iain English: leads with Cool Blue)
- Don't:** Be put off by his formality. (Iain English: leads with Cool Blue)
- Don't:** Criticise her ideas too harshly or personally. (Ian Hoey: leads with Sunshine Yellow)
- Don't:** Be unrealistic or stray on to abstractions. (Iain English: leads with Cool Blue)

A 'Show 6 more' link is located at the bottom of the communication tips section.

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- Scenario 3: Iain English and Ian Hoey both have NCP profiles, Ian Hoey has privacy settings as private

**Insights Discovery**

**Colour energy summaries**  
You can only compare profiles with people who also have Insights Discovery profiles.

Less Conscious  Conscious

**Iain English**  
Cool Blue  
Fiery Red  
Earth Green  
Sunshine Yellow

**Ian Hoey**  
Profile information not available

**Collective colour energies**  
Based on 1 out of 2 people

Energy Color	Percentage
Cool Blue	~55%
Fiery Red	~45%
Sunshine Yellow	~40%
Earth Green	~40%

**Communication Do's and Don'ts**  
From 1 out of 2 people's profiles - showing 6 at random, compare profiles to view individual do's and don'ts

**Do**

- Respect his values and principles. (IE Iain English: leads with Cool Blue)
- Respect his privacy. (IE Iain English: leads with Cool Blue)
- Organise your thoughts before communicating. (IE Iain English: leads with Cool Blue)

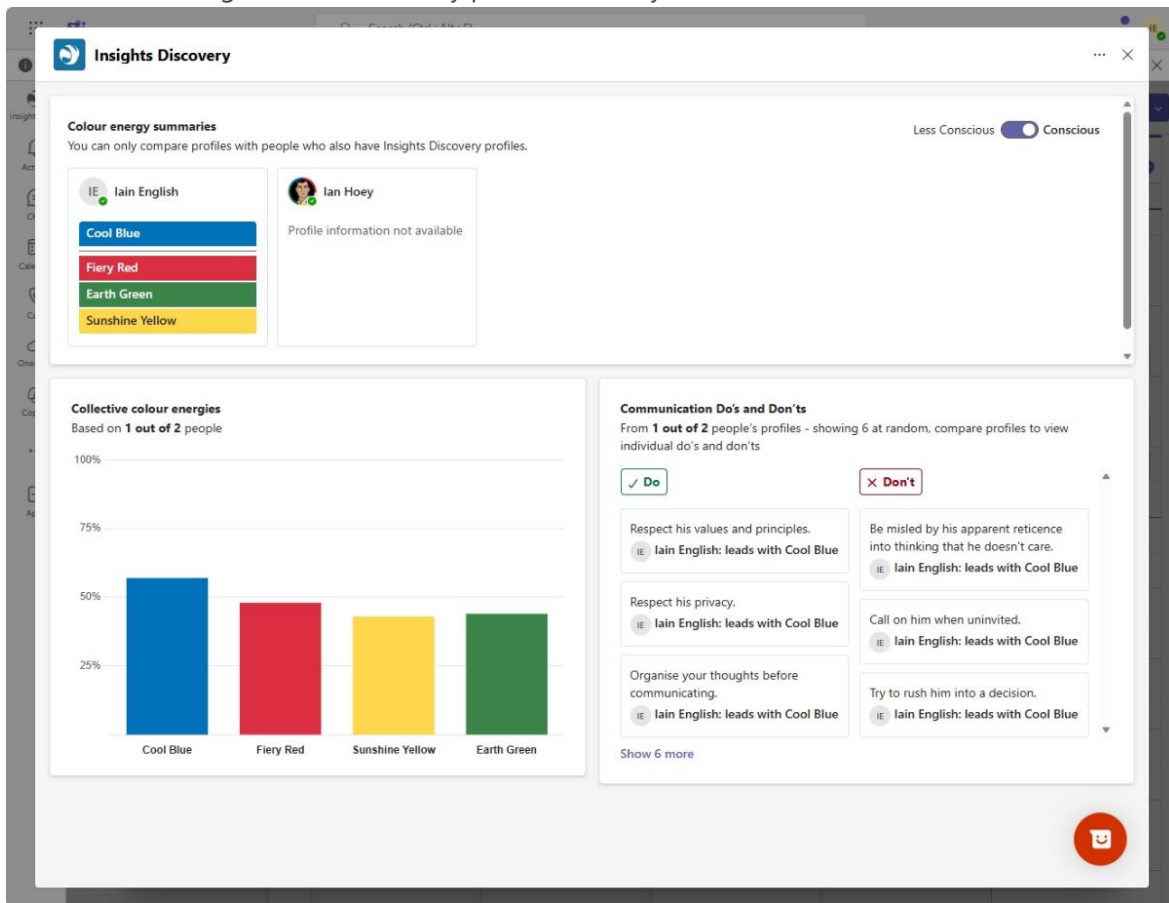
**Don't**

- Be misled by his apparent reticence into thinking that he doesn't care. (IE Iain English: leads with Cool Blue)
- Call on him when uninvited. (IE Iain English: leads with Cool Blue)
- Try to rush him into a decision. (IE Iain English: leads with Cool Blue)

Show 6 more

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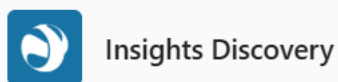
- Scenario 4: Iain English has a Discovery profile, Ian Hoey does not



## App not installed

- If a colleague does not have the app installed on their MS Teams, this is what they would see in a meeting where the Insights Discovery for MS Teams app has been added to a meeting chat:

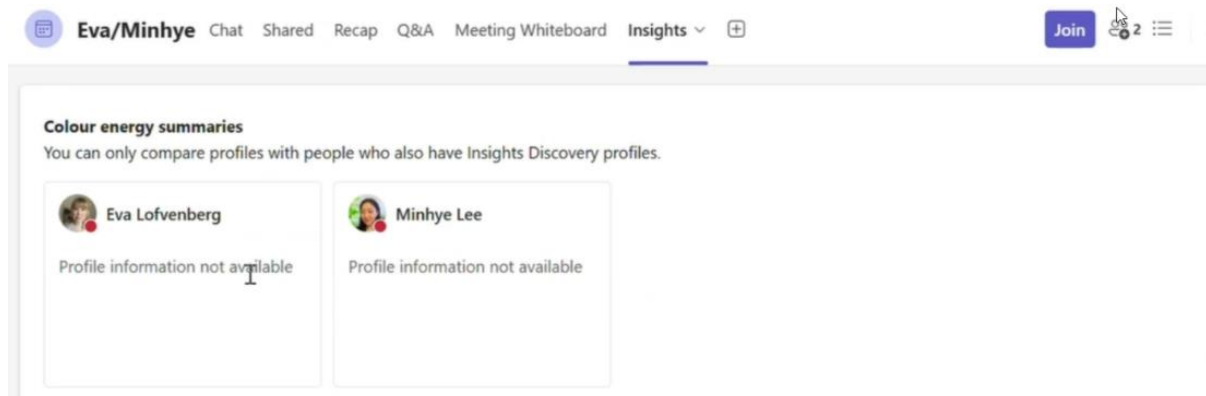
I added a tab at the top of this chat. Check it out!



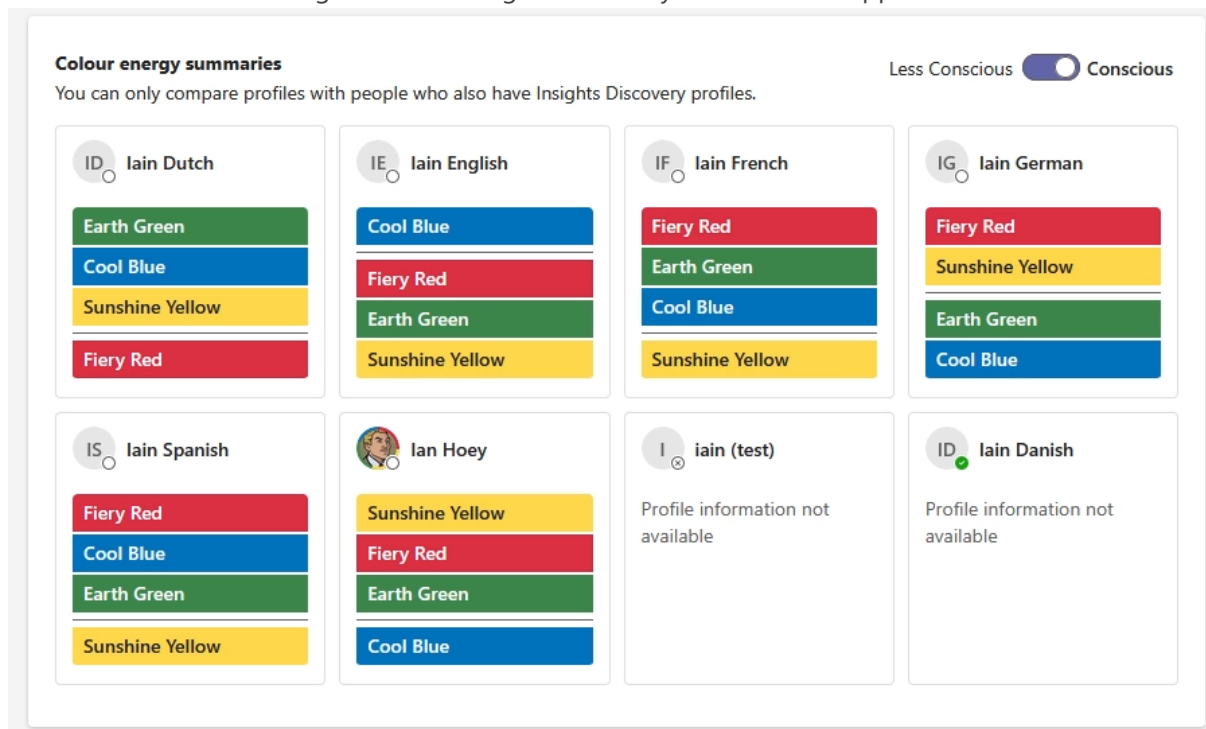
- If a colleague does not have the app installed on their MS Teams, this is what they would see in a meeting where the Insights Discovery for MS Teams app has been added to a meeting chat and they clicked on the

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app:



- A colleague – in this instance it is 'iain (test)' – who does have the app installed but does not have a profile, would see this in a meeting where the Insights Discovery for MS Teams app has been added to a meeting chat



## Dashboard functionality

Information from your Discovery profile: showing an overview of colour energy order, highlights, strengths, challenges, weekly insights, upcoming meetings

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**Insights Discovery** Dashboard Avatar Settings Activity Present now

**Your profile summary**  
Profile from 11 Oct 2023 • Compared 26 times this week

90% (Y) 67% (R) 34% (B) 23% (G)

Jump to: Highlights Strengths & weaknesses Do's and don'ts

You can customise which statements you want to display from your profile to yourself and other people. [Customise my profile](#)

**Highlights**  
She attends to and likes to remember significant events and important detail. Others need to be sure of their facts.  
[Show another](#)

**Strengths**  
• Understands the importance of "style" in presentation.

**Possible weaknesses**  
• Knows the answer before the question is asked.

**My Insights for this week**

- Your challenge**  
She should try to slow down the pace when interacting with others on a time bounded project. She may not appreciate how loud they can appear to some others.
- Your suggestion for development**  
Reflecting longer on other alternatives before jumping in to start the process.
- Your value**  
Has an awareness of the people issues in the world around them.

**Important upcoming meetings**  
A collection of upcoming meetings we've marked as potentially important that you may want to prepare for:

<b>Marketing Review</b> 02 Nov 2022 13:00 - 14:30 (Occurs every week) 5 people invited 77% (B) 67% (G) 34% (Y) 23% (R) <a href="#">View colour energies</a>	<b>Campaign Planning</b> 13 Nov 2022 10:00 - 11:00 3 people invited 77% (R) 54% (B) 40% (Y) 32% (G) <a href="#">View colour energies</a>	<b>Another meeting title with a slight longer n...</b> 13 Nov 2022 13:00 - 15:00 7 people invited No one in this meeting has shared their colour energies	<b>Marketing All Hands</b> 12 Nov 2022 15:00 - 16:00 (Occurs every 2 weeks) 22 people invited 90% (Y) 67% (R) 34% (B) 23% (G) <a href="#">Add tab to view colour energies</a>
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For help, visit the [Insights for Microsoft Teams support page](#).

**What can I do with Insights on Microsoft Teams?**

- View in-app profile summary**  
View key information from your profile in-app including your strengths and possible weaknesses and communication do's and don'ts  
**Where:** [Here on your Insights Dashboard](#)
- Group colour energy breakdowns**  
See everyone in a group's individual colour energy orders and a graph of averaged collective colour energies for groups as a whole  
**Where:** [Add Insights tabs on meetings, chats and teams to view](#)
- Communication do's and don'ts**  
View personal do's and don'ts and snapshots of a group's list of do's and don'ts from everybody's profiles to get a better sense of the group dynamic  
**Where:** [Add Insights tabs on meetings, chats and teams to view](#)  
Open the Insights app when you're in a meeting
- Compare profile summaries**  
Compare your Insights Discovery profile summary with someone else's and get tips on how to better connect  
**Where:** [Add Insights tabs on meetings, chats and teams to view](#)
- Insights Discovery colour wheel avatar generator**  
Generate a profile picture outlined with the Insights Discovery 4 colour wheel graph, with different coloured segments changing in size depending on your particular mix of colour energies  
**Where:** [Access the Avatar tab on your Insights dashboard](#)
- Weekly My Insights**  
View key statements from other areas of your Insights Discovery profile that update weekly, including chapter content e.g. your challenge for the week  
**Where:** [Here on your Insights Dashboard](#)

## Overview of colour energy order

**Your profile summary**  
Profile from 29 Apr 2024 • Viewed 0 times this week

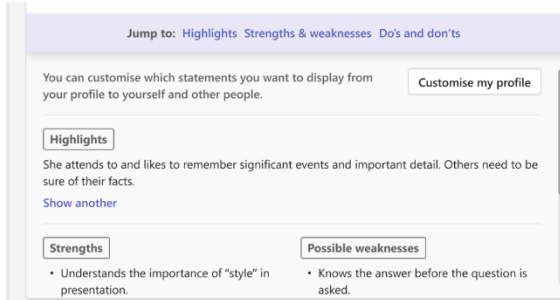
90% (Y) 67% (R) 34% (B) 23% (G)

Your colour energy order and percentages update automatically if you receive a new Discovery profile.

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The 'Viewed 0 times this week' statement is related to the number of times someone in your organisation compares their profile to yours. This can be done when viewing the Insights Discovery tab in a meeting. For more information on this, see [How to view and compare profiles – During a meeting](#).

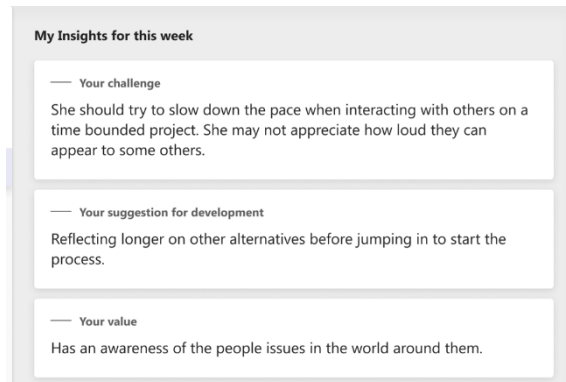
## Highlights, strengths and possible weaknesses



The statements shown are pulled directly from your Discovery profile. By using the scroll bar, you can select to show all of the statements under each heading (Strengths, Possible weaknesses, Communication do's and don'ts).

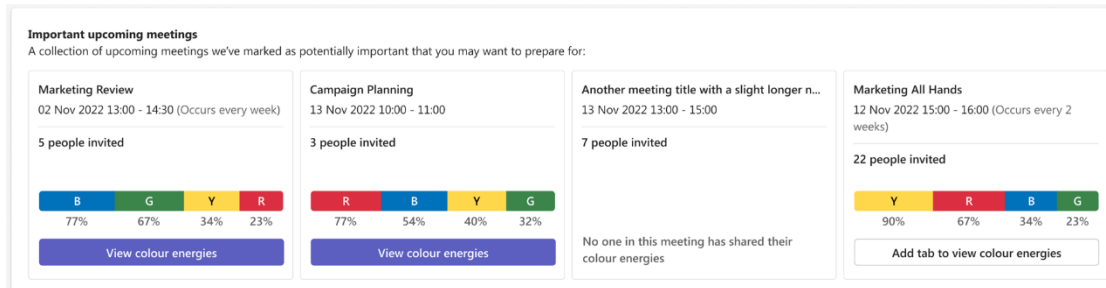
By clicking on 'Customise my profile', you can select which statements are only available to you and/or made available to other people in your organisation. For more information, see [Profile privacy settings](#).

## Weekly insights



The statements shown are pulled directly from your Discovery profile. This automatically refreshes every week.

## Upcoming meetings

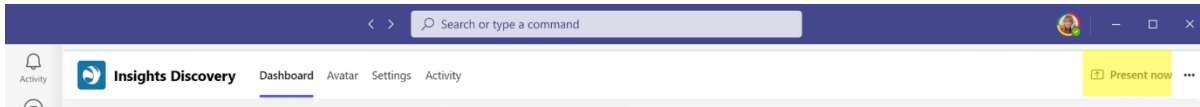


The meetings shown are pulled directly from your Outlook calendar. You can tailor the types of meetings shown by selecting 'Customise your profile' in your Dashboard view. For more information, see [Profile privacy settings](#).

You can view the colour energies make up of all meeting attendees from here, as well as add the Insights Discovery app to a meeting. For more information, see [Adding app to meetings](#).

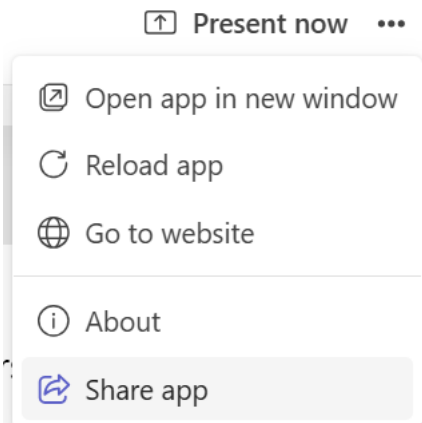
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## Present now



If you are on a call and would like to share your Dashboard view, you can do so by selecting 'Present now', in the top right corner of the Insights Discovery screen.

You can invite someone at your organisation to access the app for themselves by clicking the three dots in the top right corner of the Insights Discovery screen and selecting 'Share app'.



The pop up below will appear, allowing you to type the name of a person, group or channel you would like to share the app with. Alternatively, you can click 'Copy link'.

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## Share



Share to

Type the name of a person, group, or channel



Say something about this

Take a look at this app.

Insights Discovery



App



**Insights Discovery**

Insights Learning & Development

Use your profile while you work to better connect with your colleagues.

★ 5 (10 ratings)

⇒ Copy link

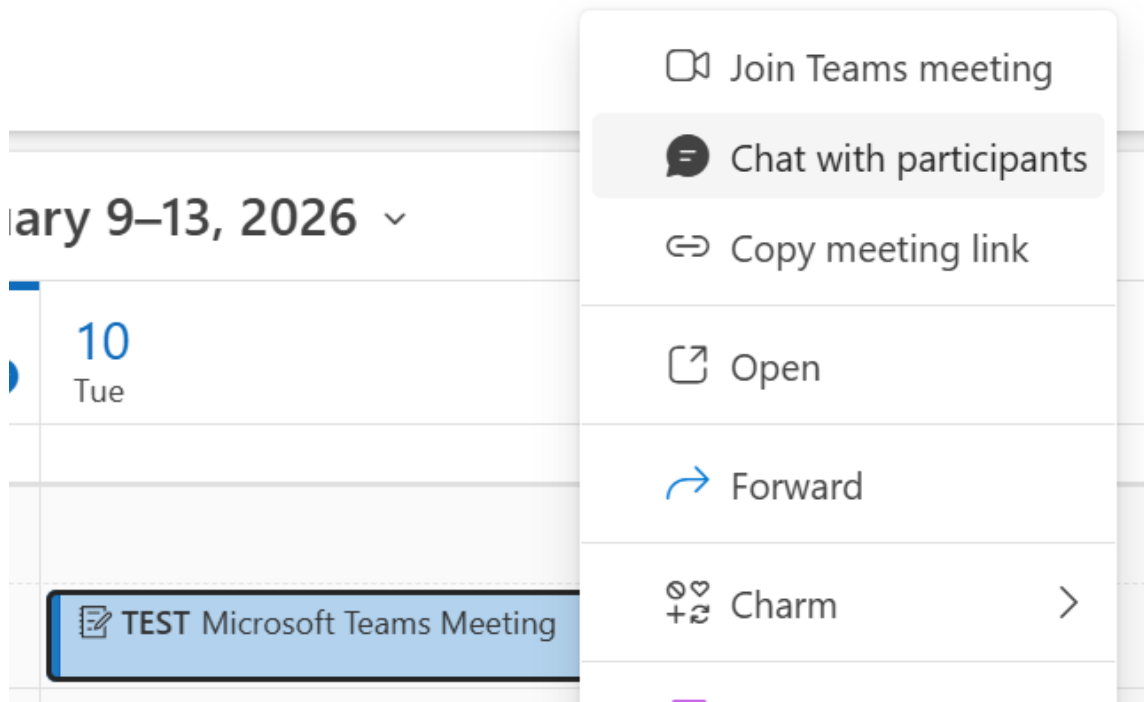
Share

## Adding app to meetings

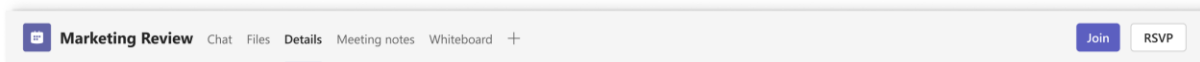
1. Go to your meeting chat in Microsoft Teams
  - a. You can access the meeting chat by going to your calendar
  - b. Right clicking the meeting

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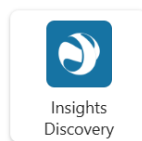
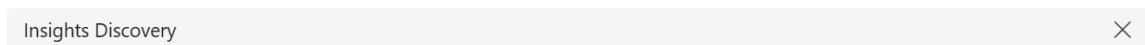
c. Selecting 'Chat with participants'



2. Click the '+' sign in the top navigation bar of the meeting chat

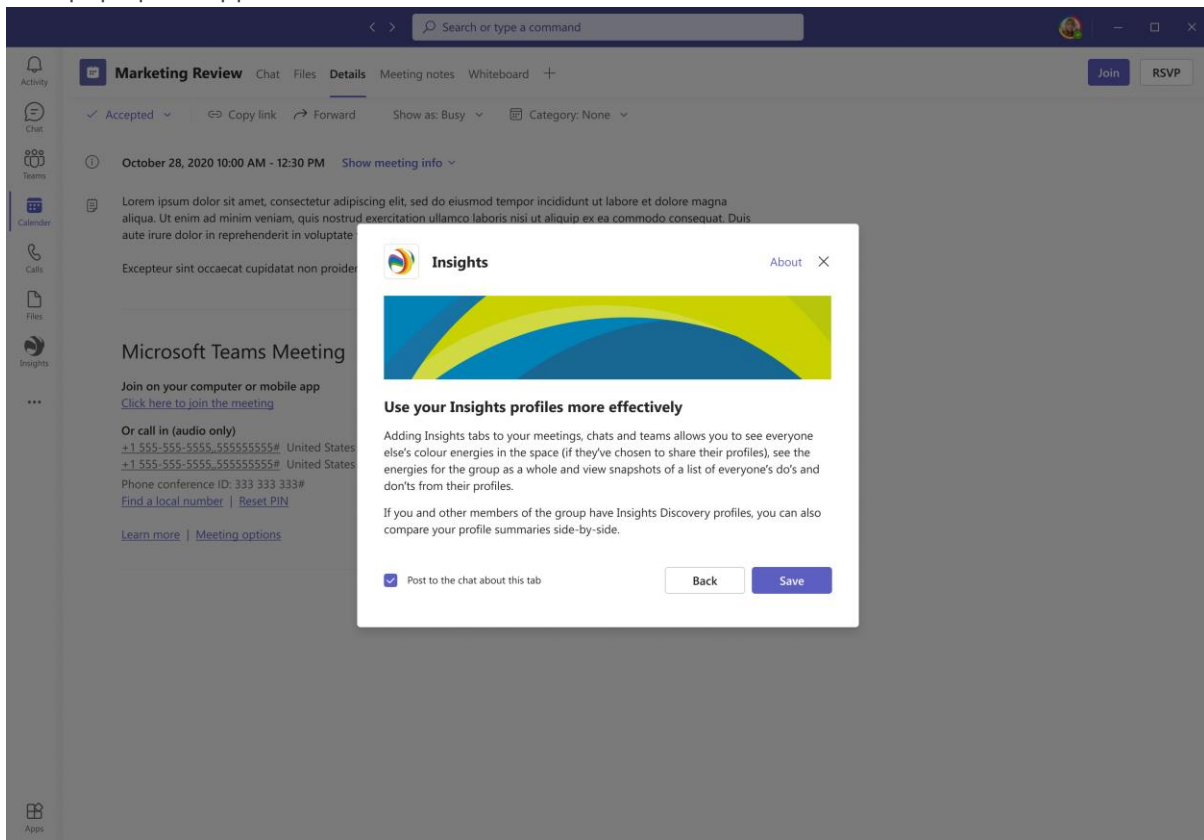


3. Type in 'Insights Discovery' and select the app shown below



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4. This pop up will appear. Click 'Save'

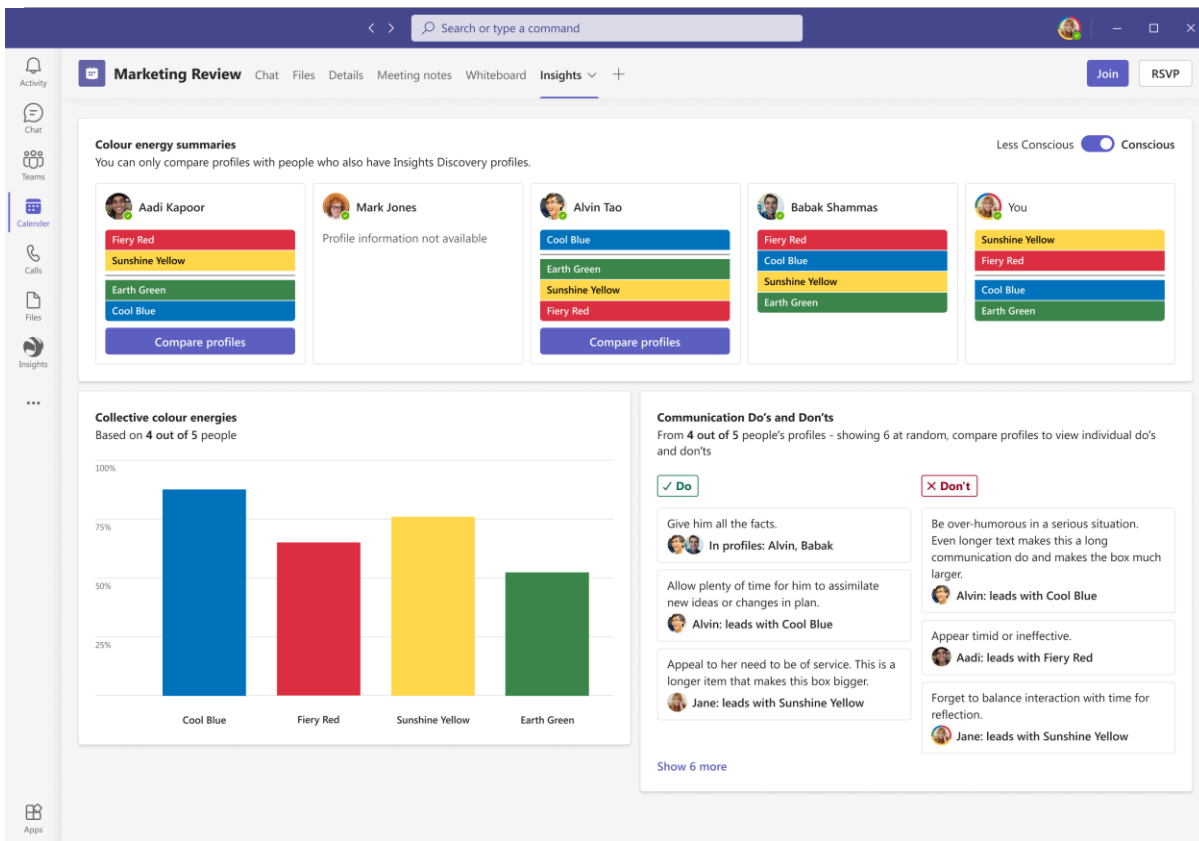


You will now see an overview of the colour energies and communication do's and don'ts of everyone in the meeting that has a profile imported. If they:

- Do not have a profile imported
- Have set their profile to private
- Do not have access to the app

Their profile card will appear as 'Profile information not available' (e.g. Mark Jones in the image below)

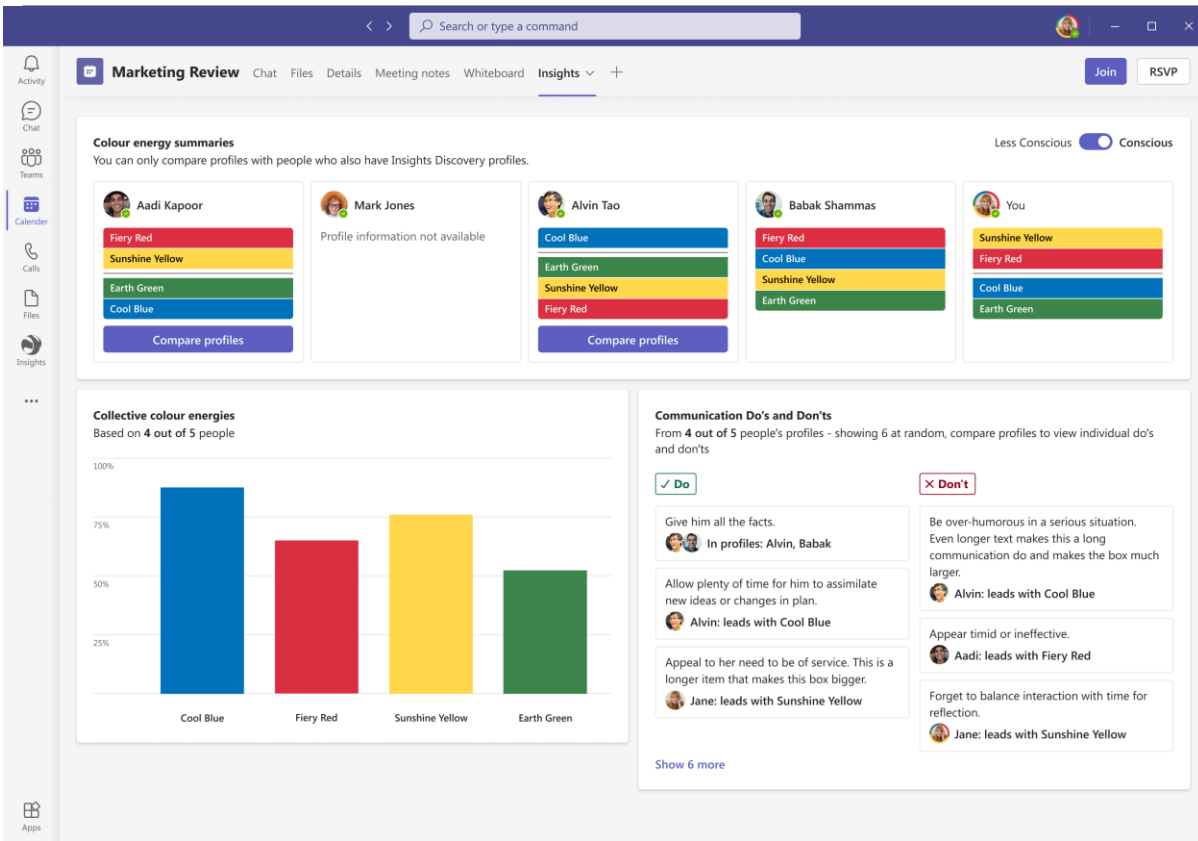
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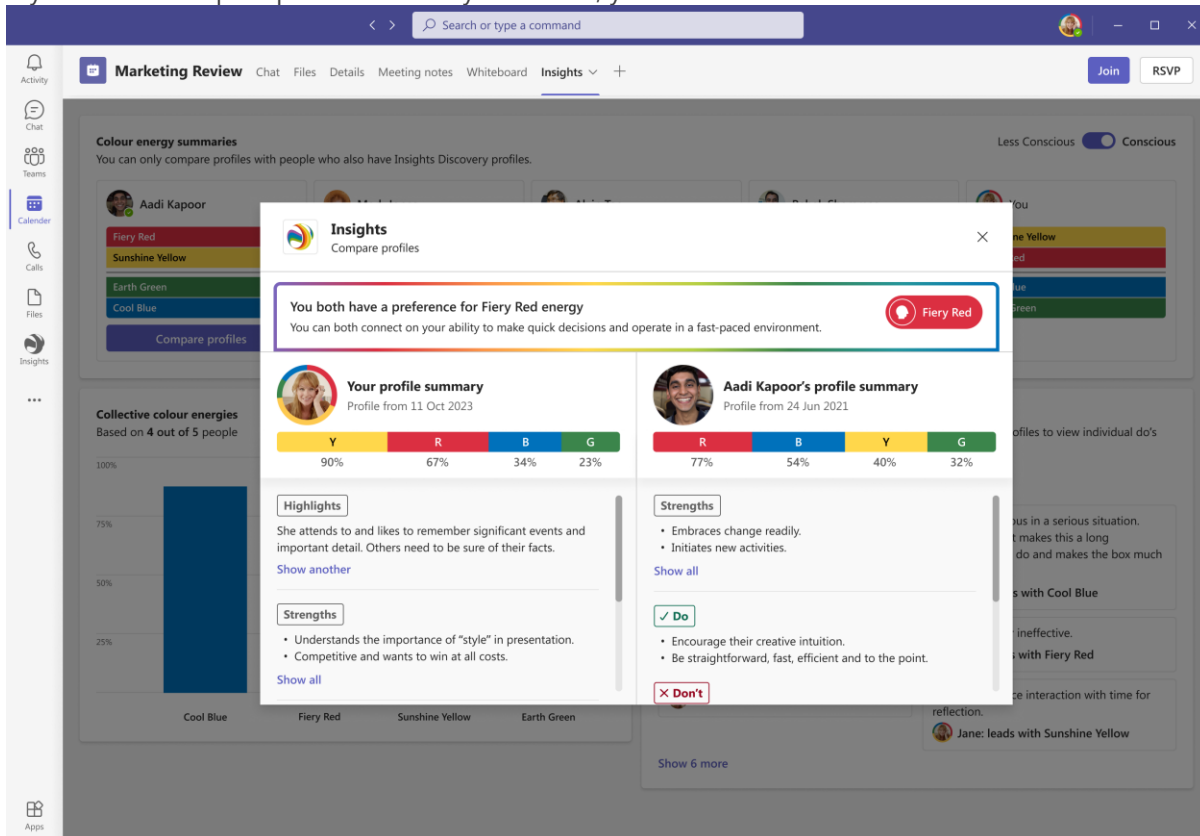
## Meeting dashboard and chat drop downs

This is how the meeting dashboard will appear

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If you select 'Compare profiles' with any individual, you will see the below



For instructions on how to compare profiles, refer to [How to view and compare profiles](#).

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During the meeting, when you click on the 'Insights Discovery' tab in the top navigation pane, the communication do's and don'ts of everyone in the meeting who has shared their profile will show in the chat dropdown section on the right



During the meeting, if you would like to see the meeting dashboard view again, you would need to:

1. Minimise the Teams meeting call screen
2. Go to your normal Teams chat view (the one that allows you to message anyone from your organisation)
3. Select the meeting chat of the call you are currently in
4. Select the app in the top navigation pane and the view below will appear

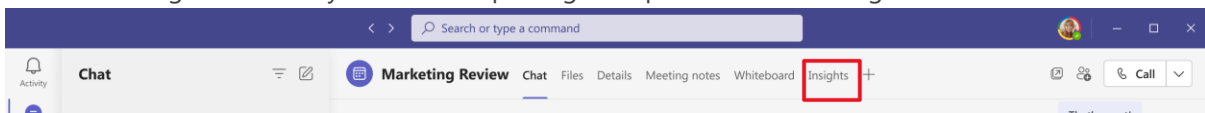
# MS Teams User guide

The screenshot displays the MS Teams interface with the 'Insights' tab selected. The main content area is titled 'Marketing Review' and shows 'Colour energy summaries' for five users: Aadi Kapoor, Mark Jones, Alvin Tao, Babak Shammass, and You. Each user's profile is represented by a vertical bar chart with colored segments corresponding to their energy levels. Aadi Kapoor has Fiery Red, Sunshine Yellow, Earth Green, and Cool Blue. Mark Jones has no profile information. Alvin Tao has Cool Blue, Earth Green, Sunshine Yellow, and Fiery Red. Babak Shammass has Fiery Red, Cool Blue, Sunshine Yellow, and Earth Green. You have Sunshine Yellow, Fiery Red, Cool Blue, and Earth Green. Below the summaries is a 'Collective colour energies' bar chart showing the percentage of people with each energy level: Cool Blue (90%), Fiery Red (70%), Sunshine Yellow (80%), and Earth Green (60%). To the right, the 'Communication Do's and Don'ts' section provides advice based on the profiles, such as 'Give him all the facts' for Alvin and Babak, and 'Be over-humorous in a serious situation' for Aadi and Alvin.

## How to view and compare profiles

### In a meeting chat

1. Follow the steps from [Adding app to meetings](#), if the Insights Discovery tab has not already been added to the meeting
2. Select the Insights Discovery tab in the top navigation pane of the meeting chat



# MS Teams User guide

- You will now see an overview of the colour energies and communication do's and dont's of everyone in the meeting that has a profile imported

The screenshot displays the MS Teams interface for a meeting titled "Marketing Review". The "Insights" tab is active, showing a search bar at the top and navigation options like "Join" and "RSVP".

**Colour energy summaries**  
You can only compare profiles with people who also have Insights Discovery profiles.

Profiles shown:

- Aadi Kapoor:** Fiery Red, Sunshine Yellow, Earth Green, Cool Blue. Includes a "Compare profiles" button.
- Mark Jones:** Profile information not available.
- Alvin Tao:** Cool Blue, Earth Green, Sunshine Yellow, Fiery Red. Includes a "Compare profiles" button.
- Babak Shammass:** Fiery Red, Cool Blue, Sunshine Yellow, Earth Green.
- You:** Sunshine Yellow, Fiery Red, Cool Blue, Earth Green.

**Collective colour energies**  
Based on 4 out of 5 people

Energy	Percentage
Cool Blue	~90%
Fiery Red	~65%
Sunshine Yellow	~75%
Earth Green	~55%

**Communication Do's and Don'ts**  
From 4 out of 5 people's profiles - showing 6 at random, compare profiles to view individual do's and don'ts

**Do's (checked):**

- Give him all the facts. In profiles: Alvin, Babak
- Allow plenty of time for him to assimilate new ideas or changes in plan. Alvin: leads with Cool Blue
- Appeal to her need to be of service. This is a longer item that makes this box bigger. Jane: leads with Sunshine Yellow

**Don'ts (crossed out):**

- Be over-humorous in a serious situation. Even longer text makes this a long communication do and makes the box much larger. Alvin: leads with Cool Blue
- Appear timid or ineffective. Aadi: leads with Fiery Red
- Forget to balance interaction with time for reflection. Jane: leads with Sunshine Yellow

Additional options on the left sidebar include Activity, Chat, Teams, Calendar, Calls, Files, Insights, and Apps.

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4. By clicking 'Compare profiles', you will get a side-by-side comparison of your profile with the person you have

The screenshot shows the MS Teams interface with a meeting titled "Marketing Review". The "Insights" app is open, displaying a comparison of two profiles. The background shows a "Colour energy summaries" section with a bar chart and a "Collective colour energies" section. The comparison window is titled "Insights Compare profiles" and highlights a shared preference for "Fiery Red energy".

**Insights Compare profiles**

You both have a preference for **Fiery Red energy**  
You can both connect on your ability to make quick decisions and operate in a fast-paced environment.

Energy	Your profile summary (Profile from 11 Oct 2023)	Aadi Kapoor's profile summary (Profile from 24 Jun 2021)
Y	90%	40%
R	67%	77%
B	34%	54%
G	23%	32%

**Highlights**  
She attends to and likes to remember significant events and important detail. Others need to be sure of their facts.  
[Show another](#)

**Strengths**  
• Understands the importance of "style" in presentation.  
• Competitive and wants to win at all costs.  
[Show all](#)

**Strengths**  
• Embraces change readily.  
• Initiates new activities.  
[Show all](#)

**Do**  
• Encourage their creative intuition.  
• Be straightforward, fast, efficient and to the point.

**Don't**

selected

5. You can also add the Insights Discovery app to a meeting by:
- Going to your Dashboard
  - Looking at your 'Upcoming Meetings'

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## c. Selecting 'Add tab to view colour energies'

The screenshot displays the 'Insights Discovery' app interface within a Microsoft Teams window. The top navigation bar includes 'Insights Discovery', 'Dashboard', 'Avatar', 'Settings', and 'Activity'. The main content area is divided into several sections:

- Your profile summary:** Shows a profile picture and a color energy bar with values: Y (90%), R (67%), B (34%), and G (23%). Below this is a 'Jump to' section with links for 'Highlights', 'Strengths & weaknesses', and 'Do's and don'ts'. A 'Customise my profile' button is also present.
- My Insights for this week:** Contains three insight cards:
  - Your challenge:** She should try to slow down the pace when interacting with others on a time bounded project. She may not appreciate how loud they can appear to some others.
  - Your suggestion for development:** Reflecting longer on other alternatives before jumping in to start the process.
  - Your value:** Has an awareness of the people issues in the world around them.
- Important upcoming meetings:** A collection of upcoming meetings marked as potentially important. It includes four meeting cards:
  - Marketing Review:** 02 Nov 2022 13:00 - 14:30 (Occurs every week), 5 people invited. Color energy bar: B (77%), G (67%), Y (34%), R (23%).
  - Campaign Planning:** 13 Nov 2022 10:00 - 11:00, 3 people invited. Color energy bar: R (77%), B (54%), Y (40%), G (32%).
  - Another meeting title with a slight longer n...:** 13 Nov 2022 13:00 - 15:00, 7 people invited. No one in this meeting has shared their colour energies.
  - Marketing All Hands:** 12 Nov 2022 15:00 - 16:00 (Occurs every 2 weeks), 22 people invited. Color energy bar: Y (90%), R (67%), B (34%), G (23%).

### During a meeting

If the 'Insights Discovery' app has already been added to the meeting (if not, please follow the steps above in '[In a meeting chat](#)'), you can:

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1. Click on the 'Insights Discovery' tab located in the top right corner of the meeting.



The communication do's and don't's of all meeting participants (who have imported their profile and shared their profile information) will appear on the right-hand side of the meeting screen.

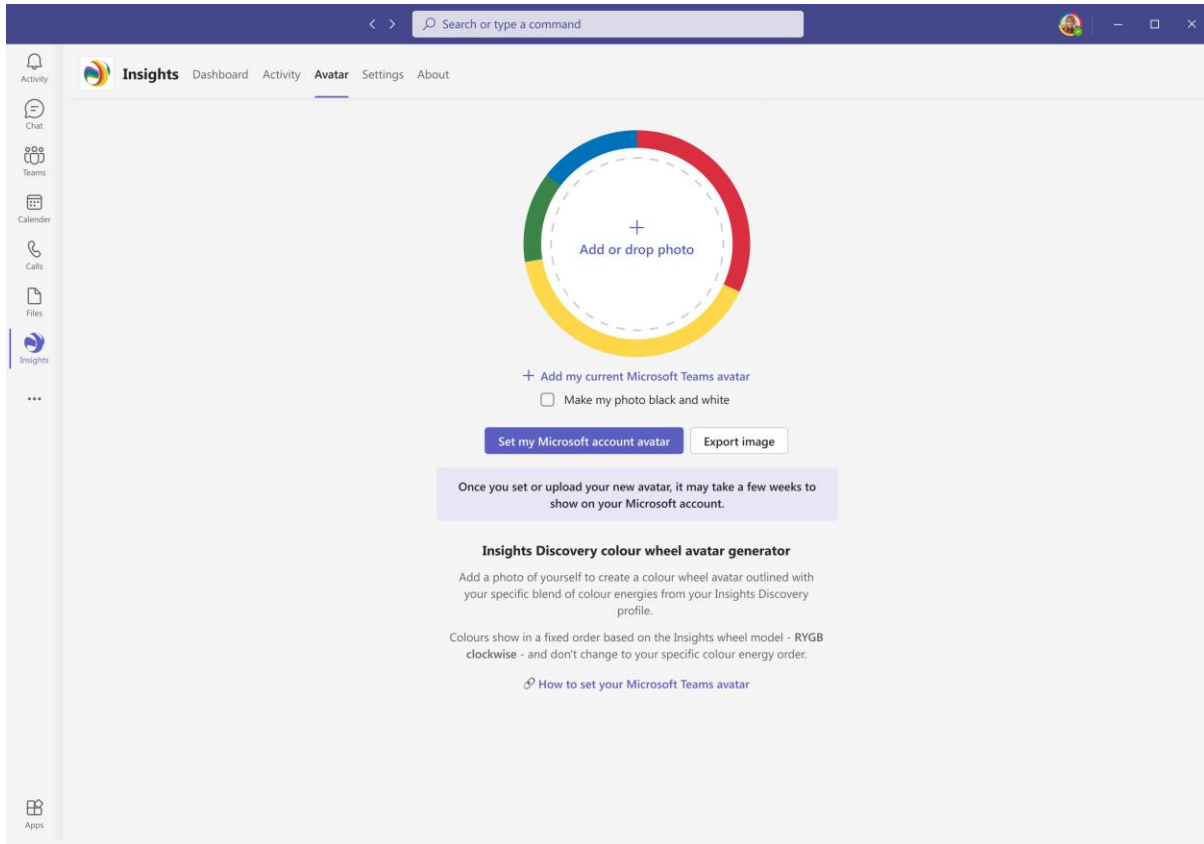
## Set up Avatar

*Please note your organisation may have internal IT policies preventing you from using the avatar or making changes to profile pictures.*

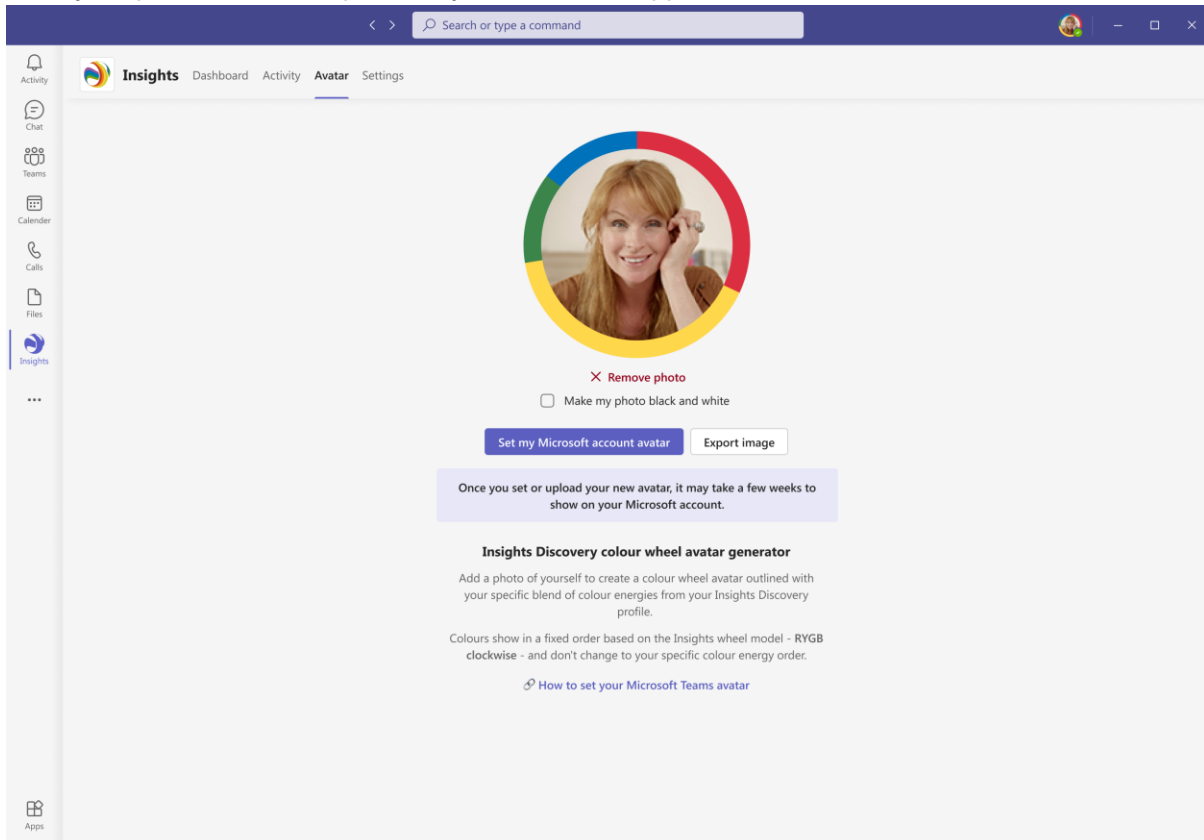
The colour wheel shown here is personalised based on your colour energy order scores.

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1. You can upload a photo and use this image as your Microsoft Teams account avatar.



2. Once your photo has been uploaded, your avatar will appear as shown below.



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3. Once set, your avatar will sync with your Microsoft Outlook account.
  - a. Please note that this may take 48-72 hours to complete.

## Language settings

- If your Microsoft Teams language is set to English (EN), Danish (DA), German (DE), French (FR), Spanish (ES), or Dutch (NL), the entire app will be fully translated. This includes profile statements, weekly insights, buttons, headings, and other in-app text.
- If your Microsoft Teams language is set to a language listed below, profile statements will display in your selected Microsoft Teams language. All other parts of the app, including buttons and headings, will display in English.

Bulgarian	Hebrew	Romanian
Chinese (Simplified)	Hungarian	Russian
<i>Chinese (Traditional)*</i>	Italian	Serbian Latin
Croatian	Japanese	Slovenian
<i>Czech*</i>	<i>Korean*</i>	Spanish (Spain)
<i>Estonian*</i>	Lithuanian	Spanish (Mexico)
Finnish	Norwegian	Swedish
French (France)	Polish	Turkish
French (Canada)	Portuguese (Brazil)	<i>Vietnamese**</i>
<i>Greek*</i>	Portuguese (Portugal)	

*\*Only statements from the foundation and management chapters in your Discovery profile will be translated.*

*\*\* Only statements from the foundation, management and sales chapters in your Discovery profile will be translated.*

- If your Microsoft Teams language is set to a language not mentioned above, the entire app will display in English. This includes profile statements, weekly insights, buttons, headings, and other in-app text.

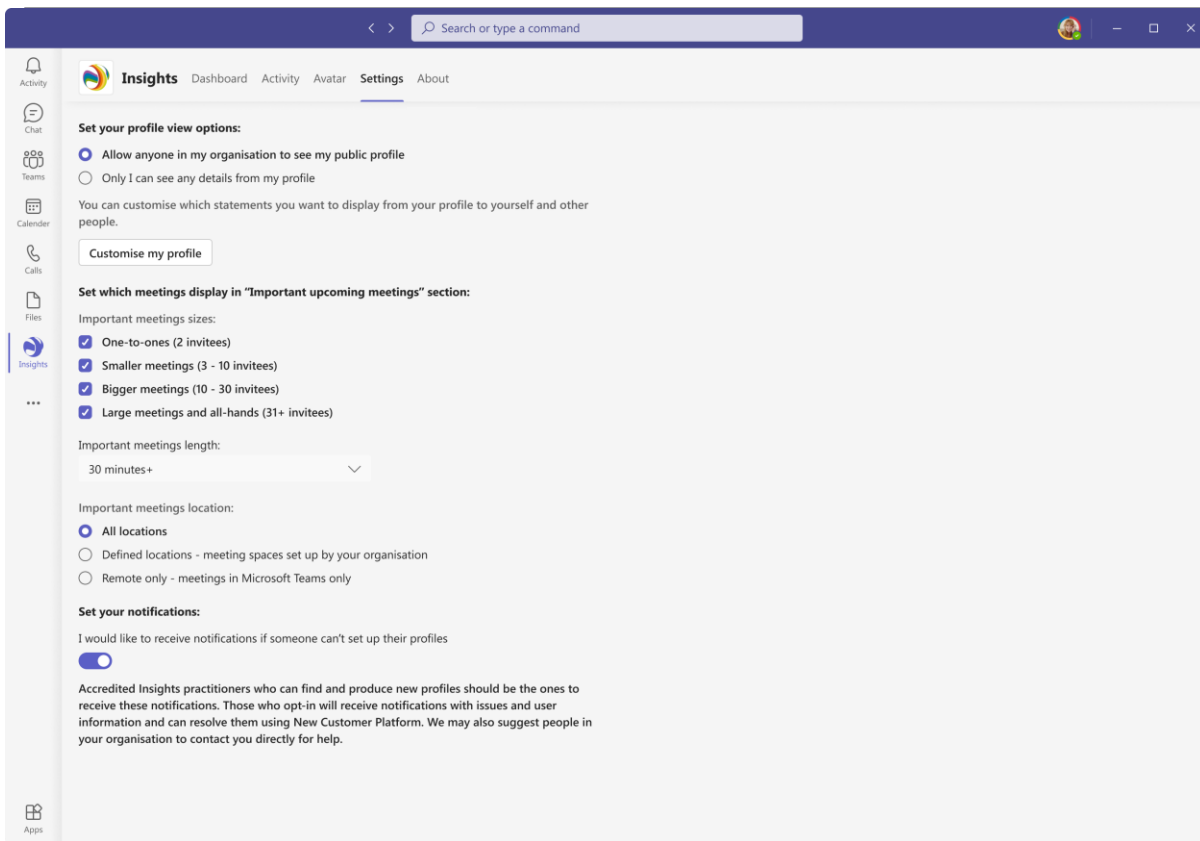
## Troubleshooting

### Application Functionality

Q: Certain meetings are not displaying under the 'Upcoming Meetings' section. How do I resolve this?

A: Check your Settings and, under Important meeting sizes, ensure the relevant options are selected.

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Also confirm that you are using the latest version of Microsoft Teams.

If the issue persists after checking these settings, please contact your account manager for further support.

*Q: Can the settings area of the app be restricted by our IT department if we want certain settings to be the default (i.e. size of the meetings, customisation of the profile)?*

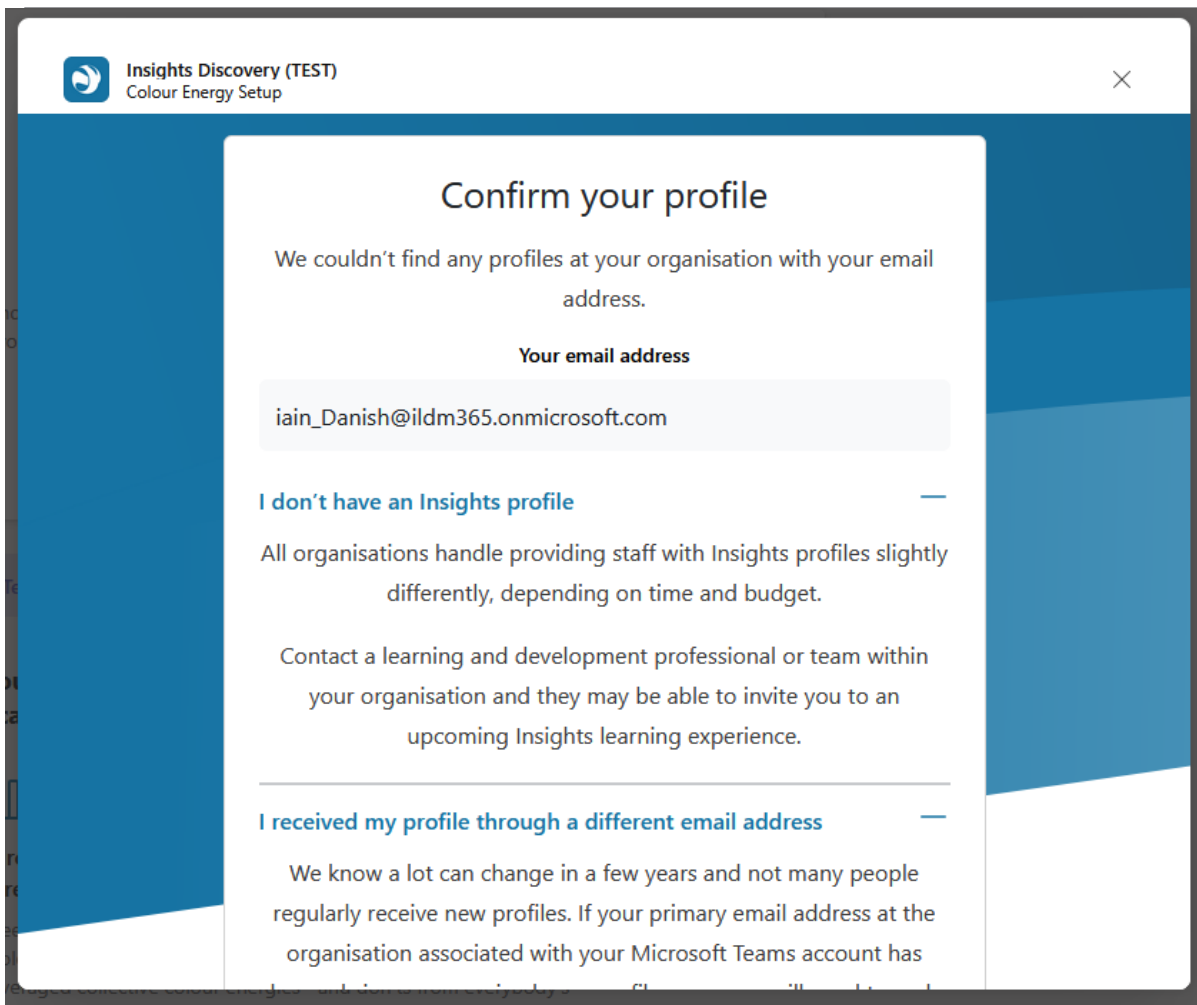
A: Not at this time. IT administrators are not currently able to restrict or enforce default settings within the app. This is a commonly requested feature and is on our product backlog for future consideration.

## Profile Import Issues

*Q: When I click 'Confirm your profile', it tells me there aren't any profiles associated with my organisation and email address. What do I do?*

A: If your profile has not imported, then you will see the below

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This could be due to any of the following:

1. You do not have an Insights Discovery profile
  - a. If a user can access Insights Discovery for Microsoft Teams but doesn't yet have a profile, they'll need to be issued an Insights Discovery profile (by the L&D professional who administers Insights in your organisation) before they can use the app.

If you, as a practitioner, are receiving a large number of these requests, it may indicate that your IT department or Microsoft administrator has granted access to all users, rather than limiting it to those who already have profiles.

To resolve this, provide your IT team with a list of users who should have access, and ensure that app access is included in the onboarding processes for new employees where appropriate.

2. You received a profile through a different email address
  - a. This issue may occur if a learner has changed their email address or used a different one to receive their new profile than the email linked to their Microsoft Teams account.

To resolve, log into the Insights New Customer Platform:

- i. In the Learners & teams section, filter by the relevant organisation, then search for the learner by name.
- ii. Confirm the learner's old and new email addresses.

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- iii. Locate the learner record with the old email address and open their learner detail page.
- iv. Select 'Edit learner' at the top right of the page.
- v. Replace the old email address with the new one in the Email address field, then select 'Save details'.

Optional: You may need to assign the old learner record a placeholder (dummy) email address to make this possible.

- vi. Once saved, the correct learner record should appear the next time they confirm their profile via Microsoft Teams.

Note: this update may take up to an hour or more to sync with the app.

If this does not resolve the profile import, please reach out to your account manager for further support.

3. Your profile is older than the 5-year retention period
  - a. To comply with GDPR, we have a 5-year retention period. In this instance, you would need to be issued an Insights Discovery profile by the L&D professional who administers Insights in your organisation.

## FAQs

### Application Functionality

*Q: How do we see profile information in a Teams meeting about others in the meeting without sharing our screen?*

A: In the meeting chat, if the Insights Discovery app has been added as a tab to the chat (see [Adding app to meetings](#)), by selecting it, the participants' profile information will show in the meeting dashboard (see [Meeting dashboard and chat drop downs](#)).

*Q: Are other meeting participants able to see profile information in advance or only when they are actually in the live call?*

A: Once the app is added to a chat or a meeting everyone in that meeting who has downloaded the app can see the same as the meeting organiser. Anyone can click on the top meeting/chat ribbon Insights Discovery (see [Adding app to meetings](#) and [Meeting dashboard and chat drop downs](#)).

*Q: What does the counter indicate next to the profile summary i.e. viewed 2 times this week?*

A: This is how often your profile has been compared with someone else's.

*Q: Can we roll this out in certain areas of the business only?*

A: Yes, organisations work with their IT teams to determine who they want to be included in the roll out. See the [setup guide](#) for step-by-step instructions.

### General

*Q: Will Insights work on an Insights Discovery for other video conferencing systems?*

A: Currently we are not. If this were to be considered in the future, it would be assessed in line with our security and privacy standards and communicated clearly to customers.

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*Q: Who owns the program long-term?*

A: Insights own the application. Any changes to the application will be automatically updated.

*Q: Is there any development happening with the use of your data in the app interacting with Copilot?*

A: No. The app does not currently use customer data to interact with Microsoft Copilot, and there is no active development in this area.

If this were to be considered in the future, it would be assessed in line with our security and privacy standards and communicated clearly to customers.

*Q: What are the steps if someone wants to opt out and delete the app?*

A: The individual user can opt out by going to 'Settings' and select 'Only I can see any details from my profile'. Their IT team would need to revoke their access in the Microsoft Admin Center for the app to be removed.

*Q: Are non-employees (e.g. clients, partners) able to use the app and pull in their profile information during a call with employees?*

A: No. Only employees associated with your organisation's Microsoft tenant ID can use the app to view profile information.

External participants, such as clients or partners, are not linked to the tenant and therefore cannot access or pull in profile data during a call.

*Q: Is my most recent profile pulled in or do I have the option to choose which profile to use?*

A: Yes, it will be the most up to date Insights Discovery Personal Profile that will pull through. It is not automatic, but this is done when confirming your profile as you set it up. If you choose to do another Insights evaluator and want it updated. This will automatically sync. It will take around 15 minutes to update and pull through.

*Q: Can I (or my customer) use the app if we're still using Insights Online?*

A: Organisations using the app must be on the New Customer Platform to pull relevant profile data. If you are still using Insights Online, please speak to your Account Manager to discuss migration.

*Q: We don't encourage learners to share profiles. Can this be turned off in the app?*

A: Not by default, but users can individually choose to make their profiles private or customise their profiles to only display colour energy orders. Sharing with others is how learners get the most value out of their profiles in team and group settings.

*Q: Are the app features available on the Microsoft Teams mobile app?*

A: Absolutely. Navigation is slightly different, and the same information you see on desktop is available on the iOS and Android apps.

*Q: Can evaluators be completed through the app?*

A: No.

## **Privacy**

*Q: What are your policies on GDPR compliance, data retention, and data privacy?*

A: Please see our [General Privacy Notice | Insights](#)