# Insights Online
# For Administrators

# Procedures

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GLOBAL HEADQUARTERS
Insights Learning & Development Ltd
Terra Nova, 3 Explorer Road, Dundee, DD2 1EG, Scotland, UK.
T: +44 (0)1382 908050 F: +44 (0)1382 908051 E:insights@insights.com www.insights.com

GLOBAL HEADQUARTERS
Insights Learning & Development Ltd
Terra Nova, 3 Explorer Road, Dundee, DD2 1EG, Scotland, UK.
T: +44 (0)1382 908050 F: +44 (0)1382 908051 E:insights@insights.com www.insights.com

## Introduction

This Insights Online Procedures document provides the Insights Online Administrator with detailed information about logging on and using the Insights Online system. These procedures will be updated regularly and represent accepted best practice for processing transactions within Insights Online. Please read through this document carefully before you start. We hope you will provide your feedback and suggestions for addition or improvement to the document to IOteam@insights.com.

Insights Online is a web-based system that offers a single entry point for all Insights clients to complete Insights evaluators, and for Insights client support staff (administrators) to process Insights evaluators and profiles from their Regional Office. Insights Online offers a wider range of evaluators and profiles to local client support staff to process, greater control over their event planning and less re-work. In the future, Insights Online will offer easier credit purchase, team functionality, batch upload of accounts, and improved reporting and activity tracking.

## Overview

The following are detailed procedures for using the Insights Online system to:

- create groups and accounts
- assign or reset passwords
- assign evaluators
- purchase profiles
- download profiles

These procedures support the production of the following Insights Profiles:

- Insights Discovery Personal Profile
- Discovery Transformational Leadership Profile
- Discovery Full Circle Profile
- Navigator Transformational Leadership Profile
- Navigator Team Effectiveness Profile

## Logging on, Searching, Creating Groups and Accounts, Password Reset

### How do I access Insights Online?

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| 1. Submit request for administrator ID to IOteam@insights.com | The Insights Online team issues Administrator ID's. Once you have received your Insights Online Administrator logon ID and password you may access the site. |
| 2. Logon to Insights Online | From the Insights Online home page (www.insights.com/online ) select logon and enter your LogonID and Password. |

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| 3. Navigate to Administrator page | Select the ‘Admin Page’ text button. |

## How do I search for a group or account?

Search allows you to locate a group or account name within your area of authority.

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| 1. Select Search | Select the Search tab. The search panel and search entry field will display |
| 2. Enter Group or Account name in Search box | Enter all or part of a Group name, Account name or email address in the Search box and Select the ‘search’ button. The first found record will display.<br><br>Note: the number of additional records found will be listed on the search tab panel. |
| 3. Select desired Group or Account name | Select the desired record from the folder list to display the Group or Account properties. |

## How do I create a new Group?

A group is a folder that holds a collection of accounts.

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| 1. Select the folder under which you want the new Group to reside. | Select the top level Group (Regional Office name or client name) where you want the new group to reside. The Group Details screen will display. |
| 2. Select on New Group | Select the New Group button in the Group Details screen. A New Group Details box will display. |
| 3. Enter New Group name | Enter the New Group name and Select the Insert button. Your new group will display under the selected group in the folder tree. |

## How do I create a new Account?

An account represents an unique individual – there should only be one account per person in Insights Online.

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| 1. Select the Group where | Select the Group folder (Company Name or Regional Office name) where you |

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| you want the new Account to reside. | want the new Account to reside. The Group Details screen will display. |
| 2. Select New Account | Select the 'New Account" button to display the User Details screen |
| 3. Enter Account Details | Enter account details in the User Details fields. All fields are required except Title (Mr., Ms., Mrs.). Always use the person's email address for the Logon ID.<br><br>**NOTE:** When creating a new account, duplicate Logon ID and/or email addresses will be flagged with a red text message<br><br>• **LogOn already exists**<br><br>• **Email already exists**<br><br>If the above message displays, cancel the new account process and enter the account last name in the search field. Select the 'search' button. The duplicate account will be highlighted. If necessary, Select the account name and 'drag and drop' the name into the appropriate Group. Select 'edit person' text button to update account details. If the duplicate Account is not found, contact supportna@insights.com or supportuk@insights.com. |
| 4. Select Insert to add new Account | Select the Insert button to complete the account set-up. The new account will display on the folder tree. |

## How do I reset a client's password?

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|---|---|
| 1. Select Account name | Select the appropriate Account. The User Details area will display including the Reset Password button. |
| 2. Select Reset Password | Select the reset password button. A new password will be generated and displayed so you can provide it to the client over the phone or in a personal email. A standard email will automatically be sent to the account holder's email address with their new password. |

# Team Functionality

## Overview

The following are administrator procedures for creating a Team in Insights Online and displaying a Discovery Team Wheel for use in PowerPoint slides, printed documents or other display methods. These procedures support the following Team transactions:

- Create a Team
- Add accounts to a team
- Add Discovery Evaluator to Team
- Email Team members
- Generate and display or save a Team Wheel

## How do I Create a Team in Insights Online?

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|---|---|
| 1. Select Group Folder | From the Administrator home page, select the Group name under which the team should appear. The Group Administration panel will display. |
| 2. Select New Team | Select the New Team button. A New Team instruction window will display.<br><br>Enter the Team Name in the field provided. |
| 3. Select Create Team | Select Create Team. The new team icon and team name will display in the tree under the group folder. |

## How do I add members (accounts) to a team?

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|---|---|
| 1. Select the Team | From the groups and accounts tree, select the Team you wish to add members to. The team administration panel will display. |
| 2. Locate Accounts | On the groups and accounts tree, locate the accounts you wish to add to the team. Accounts must be in your tree view in order for you to add them to the team. |
| 3. Select and Drag Accounts to Team panel | One at a time, select and drag each account name from the tree view to the team administration panel.<br><br>Team members' logons will display on the Team Administration Panel. |

## How do I add a Discovery Evaluator to members of a team?

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|---|---|
| 1. Select Team | From the groups and accounts tree view, select the team you wish to manage<br><br>The Team Administration Panel will display. |
| 2. Select Add Discovery Evaluator | From the Team Administration Panel, select the Add Discovery Evaluator button. The Add Discovery Evaluator dialogue box will display. |
| 3. Select team members | Check the team member names that you wish to add a Discovery Evaluator to. |
| 4. Select Add Discovery Evaluators | Select the Add Discovery Evaluators button.<br><br>Note: an email confirmation will be sent to each selected account holder requesting that they complete the Discovery Evaluator through Insights Online. |

## How do I send a ‘reminder’ email to members of a team with outstanding evaluators?

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|---|---|
| 1. Select Team | From the Groups and Accounts tree view, select the team you wish to manage. The Team Administration panel will display. |
| 2. Select Send Reminder | Select the Send Reminder button. The Send Reminder Dialogue box will display listing team members with outstanding evaluators. Select the team members that you wish to receive the reminder email. |
| 3. Select Send Emails | Select the Send Emails button.<br><br>Note: A pre-formatted email will be sent to each selected team member. The email will request that they complete the assigned evaluator and include their Insights Online logon information and a link to the Insights Online home page. |
| 4. Print Outstanding Evaluators list | Select the Print Table button, all outstanding evaluators will be listed on a new webpage. The table can be printed by using the browser’s print facility. |

## How do I send an email to all members of a team?

| | |
|---|---|
| 1. Select Team | From the Groups and Accounts tree view, select the team you wish to manage. The Team Administration panel will display. |
| 2. Select Email Team | Select the Email Team button. The Email Team Dialogue box will display listing all team members in the team. Select the team members that you wish to include in the email notice. |
| 3. Select Open Email for Edit | Select the Open Emails For Edit button.<br><br>Note: A blank email message will display using your computer's resident email application. The selected team members' email addresses will be pre-populated in the "to:" field.<br><br>Add your message to the body of the email form. |
| 4. Send email message | Send your email message as you would a regular email using your resident email application. |

## How do I generate a team wheel?

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|---|---|
| 1. Select Team | From the Groups and Accounts tree view, select the team you wish to manage. The Team Administration panel will display. |
| 2. Select Team Wheel | Select the Team Wheel button. The Team Wheel Selection box will display listing two options for generating the team wheel:<br><br>Anonymous – displays team wheel with dominant colour energy dots only<br><br>Detailed – displays team wheel with dominant colour energy dots and a legend including: team member names, wheel position, and colour energy pie charts.<br><br>Note: Discovery Team Report – this additional report option displays a simple spreadsheet of all team members and wheel position data from their Discovery evaluator. |

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| 3. Select Team Wheel Display option | Select the Team Wheel display option you desire. |
| 4. Generate Team Wheel | Select the Generate button. The file download dialogue box will display providing the following options:<br><br>Display Option: the team wheel will display as a Portable Network Graphics (.png) file. The image may be saved or copied and pasted into another application.<br><br>Save Option: the file download dialogue box will prompt you to select a folder to save the file. |

## How do I know when an Evaluator has been completed?

### Email Notification

Upon completion of an evaluator by a recipient, Insights Online will send an automated email message to the originating administrator's inbox advising that the evaluator is complete, including the recipient's name, evaluator name and date of completion.

In addition, the following steps may be used to view the completion status of an evaluator.

### View Assigned Profile status

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|---|---|
| 1. Select Account or Team | Select the plus (+) sign next to the recipient account name or team name to display the evaluators assigned to that account or team. |
| 2. View completion status | Under the user account or team name, select the desired evaluator name. The Report Administration panel will display.<br><br>If a Green Checkmark displays under the 'completed' heading of the desired profile, the evaluator has been completed. A Red X will display if the evaluator is not yet completed. |

# Assigning and Generating Profiles

## Discovery Profile

**Overview:**
- **Assigning an evaluator to an account**
- **Generating and sending the profile**

### Assigning a Discovery evaluator to an Account

| | |
|---|---|
| 1. Select Account | On the groups and accounts tree, locate and select the desired account name. The User Details fields will display.<br><br>Select the drop down arrow on the 'Add Profile to Account' panel bar. |
| 2. Assign Evaluator to Account | Select the Discovery evaluator link once.<br><br>**WARNING**: upon selecting the profile name link an email is automatically sent to the account holder with their account details and a request to complete the evaluator. This email cannot be recalled or revised. |
| 3. Verify Assignment | The evaluator name and date will display under the account name in the folder tree. This information can be changed in the report details area. |
| 4. Confirm receipt | If required, send a follow-up email from yourself to account holder with desired completion date, workshop date etc. and note that Insights Online details have been emailed to them. |

### Generating a Discovery profile

| | |
|---|---|
| 3. Select appropriate Account | Select the plus (+) sign next to the respondent account name to display the evaluators assigned to that account. The User Details panel will appear. |
| 4. Confirm completion. | Under the user account name, select the desired evaluator name. The Report Administration panel will display.<br><br>If a Green Checkmark displays under the 'completed' heading of the desired profile, the evaluator has been completed. A Red X will display if the evaluator is not yet completed. |

| | |
|---|---|
| 5. Set report options | Select the ‘Generate Report Options’ Button. The Purchase Profile (Step 1 of 2) dialogue box will display. Select the desired report chapters for purchase.<br><br>Note: The Foundation Chapter is always required to generate a profile.. |
| 6. Purchase Report | Select Purchase to confirm purchase of the profile. Online Units will be withdrawn from your account, and your account balance will be updated |
| 7. Download Report | Select the Next button to view the Download Report (step 2 of 2) dialogue box.<br><br>Select the preferred language.<br><br>Select the desired chapters to download.<br><br>Select the Download button to download the report to your computer. A PDF File will be generated and options to Open or Save presented.<br><br>Save the PDF document to appropriate folder on your computer. |
| 8. Send Report | Attach the Discovery Profile PDF document to an email and send to the recipient or practitioner. |

## Discovery Transformational Leadership Profile

**Overview**

- Assign colour scores to account
- Generating and sending the profile

| | |
|---|---|
| 1. Select desired Account | Select the desired Account name from the Groups and Accounts tree view. The User Details fields will display.<br><br>Note: A Discovery profile must be completed by the individual to generate a wheel position and colour scores for the account. |
| 2. Verify colour scores | Select the Add Colour Scores drop down arrow button to view colour scores status. If colour scores appear in the Colour Score fields, go to step 5. |
| 3. Add colour scores | If Discovery colour scores have been provided by the client, enter the Discovery colour scores into the Colour Scores panel fields for this account.<br><br>Note: the Discovery Profile must be purchased in order to establish a wheel position for the account. See Generating a Discovery Profile for more information.<br><br>Go to step 5. |
| 4. No colour scores - Request Evaluator | If no colour scores exist, Select the Discovery Transformational Leadership evaluator link under Profile Links.<br><br>**Warning:** an email requesting a DISCOVERY evaluator be completed will be sent to the client.<br><br>The administrator must monitor the account for evaluator completion and a DISCOVERY profile purchasedd for colour scores to be populated prior to generating an IDTL profile.<br><br>Once colour scores are added, go to step 6. |
| 5. Display Evaluators | Select the Drop Down arrow button on the 'Add Profile to Account' panel area. |
| 6. Assign Evaluator from | Select <u>once</u> on the Discovery Transformational Leadership evaluator link within the |

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| Completed Profile link | Completed Profiles list.<br><br>The evaluator name and date will display under the account name in the folder tree.<br><br>Note – no email is sent to the account holder. |
| 7. Display Report. | Select the IDTL profile name under the account name. The Report Administration screen will display with the assigned evaluator showing. |
| 8. Purchase Report | Select ‘Generate Report Options.’ The Purchase Report )Step 1 of 2) dialogue box will display.<br><br>Select Purchase to confirm purchase of the profile. Online Units will be withdrawn from your account, and your account balance will be updated |
| 9. Download Report | Select ‘Next’ to display the Download Report (Step 2 of 2) dialogue box.<br><br>Select ‘Download’ to download the report to your computer. A PDF File will be generated and options to Open or Save presented.<br><br>Save the PDF document to a folder on your computer. |
| 10. Send Report | Attach Insights Discovery Transformation Leadership Profile PDF document to email and send to recipient or practitioner. |

## Discovery Full Circle profile – Multi-rater

**Overview**

- Assigning an evaluator to a recipient account
- Assigning respondent accounts to a recipient profile
- Generating the profile
- Sending the profile

### Assigning a DFC Evaluator to a Recipient and Respondents

| | |
|---|---|
| 1. Create or locate Recipient account | On the Groups and Accounts tree, create or locate the Recipient account.<br><br>Note: Use the DFC order form to collect Recipient and Respondent account data from client.<br><br>Enter colour scores from spreadsheet to corresponding fields for the Recipient account. |
| 2. Create or locate Respondent accounts | Create or locate accounts for all Respondents (max. 12). Use DFC order form to collect Recipient and Respondent account data from Client.<br><br>Enter colour scores from spreadsheet to corresponding fields for each account that requires colour scores. |
| 3. Display Recipient Evaluators | From the groups and accounts tree, select the Recipient Account name. The User Details fields will appear.<br><br>Select the ‘Add Profile to Account’ drop down panel. The list of available evaluators will appear. |
| 4. Verify Colour scores and Assign DFC Evaluator to Recipient Account | If colour scores appear in the Recipient Account, a new profile is not required.<br><br>Under the **Completed Profile Links** section, Select the Discovery Full Circle link. An email will not be sent to the recipient.<br><br>The evaluator name and date will display under the account name in the folder tree.<br><br>Go to Step 6. |

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| 5. No Colour Scores - Request Evaluator | If no colour scores are available, a new Discovery profile is required. In the Profile Links area Select the Discovery evaluator link once.<br><br>**WARNING**: upon Selecting the profile name an email is automatically sent to the account holder with account details and a request to complete the evaluator. This email cannot be recalled or revised.<br><br>The DFC evaluator name and date will display under the account name in the folder tree. |
| 6. Display Recipient Report | In the groups and accounts tree, select the Recipient Account name. Select the assigned Discovery Full Circle evaluator. The Report Administration panel will display. |
| 7. Assign Respondents to Recipient Profile | Locate each respondent account name on the groups and accounts tree. One at a time, Select and drag each respondent name from the folder tree to the 'Respondent' area.<br><br>**WARNING**: upon dropping the respondent name into the Respondent area an email is automatically sent to the respondent with account details and a request to complete the DFC evaluator. This email cannot be recalled or revised. |
| 8. Verify Assignment of Respondents. | Verify that all assigned respondent names display in the Respondent field. A red X will display next to each name until the respondent has completed the DFC evaluator.<br><br>If required, send a follow-up email to recipient and respondent account holders with desired completion date, workshop date etc. |

### Generating a DFC Profile

| | |
|---|---|
| 1. Select appropriate Account (Recipient) | On the groups and accounts tree, Select the plus (+) sign next to the DFC Recipient Account name. All evaluators assigned to the account will display.<br><br>Select on the Discovery Full Circle profile name. The Report Administration panel will display. |
| 2. Display Report Administration panel. | The Report Administration panel will display the list status of the assigned evaluators.<br><br>If a Green Checkmark displays under the 'completed' heading of the profile for the |

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|---|---|
| | Recipient and all assigned Respondents, the evaluator has been completed. A Red X will display for those accounts that have not yet completed the evaluator.<br><br>**Note**: If the event date is near, and all evaluators are not complete, check with your Account Manager or Workshop Facilitator. They may direct you to generate the profile without all respondents included. |
| 3. Report Options | Select 'Generate Report Options.' The Purchase Report (Step 1 of 2) dialogue box will appear. |
| 4. Purchase Report | Select Purchase button. Online Units will be withdrawn from your Account.<br><br>Note: you will be prompted to verify that adequate online units are available to purchase this report. If additional units are required, please order through My Online Units tab.<br><br>Select the 'next' button. The Download Report (step 2 of 2) dialogue box will appear. |
| 5. Download Profile<br>a: English | Select Download button.<br>A PDF document will be generated and presented including all profile content.<br>Review the PDF document for name, gender, language, colour scores.<br>Save PDF document to appropriate folder. |
| b: Non-English | Select Download button.<br>An HTML page will be generated and presented including all profile content.<br>Review the HTML document for name, gender, language, colour scores.<br>Print the HTML document to a PDF file using appropriate print margin settings in your browser for Letter or A4 paper sizes.<br>○ A4 print settings for DFC Print:<br>Size: A4<br>Source: Auto Select<br>L 25 R 20<br>T. 15 B 15<br><br>○ Letter settings for DFC Print:<br>Size: Letter<br>Source: Auto Select<br>L 1.28 R 0.15<br>T. 0.43 B 0.2 |

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|---|---|
| 6. Send Profile | Attach Insights Discovery Full Circle Profile PDF document to an email and send to appropriate recipient or practitioner. |

GLOBAL HEADQUARTERS
Insights Learning & Development Ltd
Terra Nova, 3 Explorer Road, Dundee, DD2 1EG, Scotland, UK.
T: +44 (0)1382 908050 F: +44 (0)1382 908051 E:insights@insights.com www.insights.com

## Navigator Transformational Leadership profile – Multi-rater

### Overview

- Assigning an evaluator to a recipient account
- Assigning respondent accounts to a recipient profile
- Generating the profile
- Sending the profile

### Assigning an Insights Navigator Transformational Leadership Evaluator to a Recipient and Respondents

| | |
|---|---|
| 1. Create Recipient account | On the groups and accounts tree, create or locate the Recipient account.<br><br>Note: Use the INTL order form to collect Recipient and Respondent account data from Client.<br><br>Transpose colour scores from spreadsheet to corresponding fields for each account that has colour scores. |
| 2. Create Respondent accounts | Create or locate accounts for all Respondents. Use INTL order form to collect Respondent account data from Client.<br><br>Note: Standard DFC profile price allows for up to 12 respondents.<br><br>Enter respondent colour scores from spreadsheet to corresponding fields for each account. |
| 3. Display Recipient Evaluators | On the groups and accounts tree, select the Recipient Account name. The User Details panel will display.<br><br>Select the 'Add Profile to Account' panel. The list of available evaluators will display. |
| 4. Assign INTL Evaluator to Recipient Account | Select <u>once</u> on the Insights Navigator Transformational Leadership evaluator link.<br><br>**WARNING**: upon selecting the profile name an email is automatically sent to the account holder with account details and a request to complete the evaluator. This email cannot be recalled or revised.<br><br>The evaluator name and date will display under the account name in the groups and accounts tree. |

| | |
|---|---|
| 5. Display Report Administration | Under the recipient account name, select the assigned INTL evaluator. The Report Administration panel will display. |
| 6. Assign Respondents to Recipient Profile | Locate each respondent account name on the folder tree. One at a time, Select and drag each respondent name from the folder tree to the 'Respondent' area.<br><br>**WARNING**: upon dropping the respondent name into the Respondent area an email is automatically sent to the respondent with account details and a request to complete the INTL evaluator. This email cannot be recalled or revised. |
| 7. Verify evaluator assignment | Verify that all assigned respondent names display in the Respondent field. A red X will display next to each name until the respondent has completed the INTL evaluator.<br><br>If required, send a follow-up email to recipient and respondent account holders with desired completion date, workshop date etc. and notice that Insights Online details have been sent. |

## Generating an Insights Navigator Transformational Leadership Profile

| | |
|---|---|
| 1. Select Recipient Account | Select the plus (+) sign next to the Recipient account name. All evaluators assigned to the account will display. |
| 2. Display Report Administration panel. | Select the INTL profile name. The Report Administration panel will display.<br><br>If a Green Checkmark displays under the 'completed' heading of the desired profile for the Recipient and all assigned Respondents, the evaluator has been completed. A Red X will display for those accounts that have not yet completed the evaluator.<br><br>**Note**: If the event date is near, and all evaluators are not complete, check with your Account Manager or Workshop Facilitator. They may direct you to generate the profile without all respondents included |
| 3. Display report options | Select 'Generate Report Options.' The Purchase Report (Stage 1 of 2) screen will appear. |

| | |
|---|---|
| 4. Purchase Report | Select Purchase report. Insights online units will be withdrawn from your account.<br><br>Note: you will be prompted to verify that adequate online units are available to purchase this report. If additional units are required, please order through the My Online Units tab. |
| 5. Download Report | Select the 'Next' button. The Download Report (Stage 2 of 2) screen will appear.<br><br>Select language.<br><br>Select Download Report.<br><br>A PDF File will be generated and options to Open or Save presented.<br><br>Save PDF document to appropriate folder. |
| 6. Send Profile | Attach Insights Discovery Full Circle Profile PDF document to an email and send to appropriate recipient or practitioner. |

## Editing report details

| | |
|---|---|
| 1. Display Report Administration panel | Select the appropriate recipient account and select the assigned evaluator.<br><br>The Report Administration panel will display. |
| 2. Select Edit report details | In the Report Details area Select 'Edit Report Details.' |
| 3. Edit Report Details | In the Report details box edit the text to change the date or name of the report.<br><br>Select 'apply' to save changes.<br><br>The new report information will display next to the assigned evaluator under the account name. |

## Deleting a Report

| | |
|---|---|
| 1. Display Report Administration screen | Select the appropriate recipient account and select the assigned evaluator.<br><br>The Report Administration screen will display. |
| 2. Select Delete report | In the Report Details area Select 'Delete Report' |
| 3. Confirm Delete request | Select 'OK' to delete the entire report, or 'Cancel' to return to the previous screen. |

## Deleting a respondent from a multi-rater evaluator

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|---|---|
| 1. Display Report Administration screen | Select the appropriate recipient account and select the assigned evaluator. |
| 2. Remove a single respondent | In the Respondent area of the Report Administration screen, scroll to the right until the 'remove' button appears.<br><br>Select the 'remove' button next to the respondent you wish to remove. The report will no longer include data from this respondent. |

## Resetting the Status of a Respondent's Evaluator

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|---|---|
| 1. Display Report Administration screen | Select the appropriate recipient account and \select the assigned evaluator. |
| 2. Remove a single respondent | In the Respondent area of the Report Administration screen, scroll to the right until the 'reset' arrow appears.<br><br>Select the 'reset' arrow next to the respondent you wish to reset. The respondent will now be able to log back in to Insights Online and modify their responses. Once finished, they will be resubmitted with a "Evaluator Completed" status. |

## Navigator Team Effectiveness Profile (multi-rater)

Overview

- Assign a Navigator Team Effectiveness profile to a team
- Edit Navigator Team Effectiveness profile Details
- Add non-team member respondent to a team profile
- Remove respondent from Navigator Team Effectiveness Profiles
- Purchase  Navigator Team Effectiveness Profiles
- Download Navigator Team Effectiveness Profiles

### Assigning a Navigator Team Effectiveness Profile to a team

| | |
|---|---|
| 1. Select Team | From the groups and accounts tree view, select the team you wish to receive the Navigator Team Effectiveness Profile.<br><br>The Team Administration Panel will display. |
| 2. Select Add Navigator Team Effectiveness Profile | From the Team Administration Panel, select the Add Navigator Team Effectiveness Profile button.<br><br>The Add Navigator Team Effectiveness Profile dialogue box will display. |
| 3. Select team members to include | Check the team member names that you wish to receive a Navigator Team Effectiveness Profile evaluator. |
| 4. Select OK | Select the OK button.<br><br>Note: an email confirmation will be sent to each selected account holder requesting that they complete the Navigator Team Effectiveness evaluator through Insights Online. |

### Editing a Navigator Team Effectiveness profile name

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|---|---|
| 1. Locate Team | Locate the team on the Groups and Accounts tree. Select the plus (+) sign next to the Team Name.<br><br>The profile(s) assigned to the team will display. |

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|---|---|
| 2. Select Team Profile | Select the Profile name to edit. The Profile Administration panel will display. |
| 3. Select Edit Profile Details | Select the Edit Profile Details button. A new dialogue box will display.<br><br>Enter the new profile details (name, date, etc.) in the field provided. |
| 4. Select Apply Edit | Select the Apply Edit button to save your changes. |

### Adding an account to the profile that is not a member of the team

| | |
|---|---|
| 1. Locate Team | Locate the team on the Groups and Accounts tree. Select the plus (+) sign next to the Team Name.<br><br>The profile(s) assigned to the team will display. |
| 2. Select Team Profile | Select the desired Profile name. The Profile Administration panel will display. |
| 3. Locate non-member account | On the Groups and Accounts tree, locate the account name you wish to add to the Navigator Team Effectiveness profile. |
| 4. Add non-member account to the profile | Drag and drop the account to the profile's respondent panel.<br><br>The account will be added and an email confirmation will be sent to the account holder. In addition, the account will be added as a member of the team. |

### Removing a respondent from a Navigator Team Effectiveness Profile

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|---|---|
| 1. Locate Team | Locate the team on the Groups and Accounts tree. Select the plus (+) sign next to the Team Name.<br><br>The profile(s) assigned to the team will display. |

| | |
|---|---|
| 2. Select Profile | Select the Navigator Team Effectiveness Profile you wish to manage.<br><br>The Team Administration panel will display. |
| 3. Remove a Respondent | Select the 'Remove' button following the name of the respondent you wish to remove. The respondent will be removed from the profile.<br><br>Note: the respondent will be removed from the profile but not from the team. |

### Checking to see if team member profiles are completed

| | |
|---|---|
| 1. Locate Team | Locate the team on the Groups and Accounts tree. Select the plus (+) sign next to the Team Name. The profile(s) assigned to the team will display. |
| 2. Select Team Profile | Select the desired Profile name. The Profile Administration panel will display. |
| 3. View Completed Profile status for each Team Member | View the completion status for each team member.<br><br>A green checkmark will display next to each team member's name if they have completed the evaluator.<br><br>A Red X will display if the evaluator is not yet completed.<br><br>Refer to help procedures for Sending a Reminder if you wish to send a reminder to team members. |

## Purchasing and Download Navigator Team Effectiveness profiles for members of a team

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| 9. Locate Team | Locate the team on the Groups and Accounts tree. Select the plus (+) sign next to the Team Name. The profile(s) assigned to the team will display. |
| 10. Select Profile | Select the desired Navigator Team Effectiveness Profile name. The Profile Administration panel will display.<br><br>A green checkmark will display next to each team member's name if they have completed the evaluator. A Red X will display if the evaluator is not yet completed. |
| 11. Select Generate Profile Options | Select the 'Generate Profile Options' button. The Purchase (stage 1 of 2) screen will display.<br><br>The Profile Options window displays columns for Incomplete, Complete and Purchased evaluators.<br><br>Total Unit costs for all completed INTE evaluators display in the Online Units tally column.<br><br>If additional Online Units are required, order units using the online unit request order form under the 'My Online Units' tab.<br><br>To exclude any completed profiles from the purchase, close the Generate Profile Options window and delete the team member from the profile before proceeding. |
| 12. Purchase Profiles | Select the Purchase Report button to confirm purchase of each selected profile.<br><br>Online Units will be withdrawn from your account, and your account balance will be updated. Completed evaluator account names will move to the Purchased column. |
| 13. Download Profiles | Select the 'Next' button. The Download (stage 2 of 2) screen will display. |
| 14. Download Profile(s) | The download screen displays selections for the Multi-rater (averaged) Team profile and for each individual team member's profile.<br><br>One at a time, select the desired profile radio button, and then select the 'Download' button. |

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| | For individual team member profiles, select the desired format 'Named' or 'Anonymous' prior to selecting the 'Download' button.<br><br>Profiles will download in PDF format. Save each file to your computer.<br><br>Note: the Individual Team Profile includes results from the individual respondent and the averaged results for the whole team. |
| 15. Print or Send Profiles | Print Profiles or attach each Profile PDF document to an email and send to appropriate recipient or practitioner. |


GLOBAL HEADQUARTERS
Insights Learning & Development Ltd
Terra Nova, 3 Explorer Road, Dundee, DD2 1EG, Scotland, UK.
T: +44 (0)1382 908050 F: +44 (0)1382 908051 E:insights@insights.com www.insights.com

## Credit Management

The following are administrator procedures for using the Insights Online Credit Management system. These procedures support the following Credit Management transactions:

- Request Insights Online Units
- Transfer Online Units between accounts
- View Online Unit balance
- Generate a Unit Transaction report

### How do I order Insights Online Units?

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| 1. Select My Online Units Tab | From the Administrator home page, select the My Online Units tab. |
| 2. Select Online Unit Request link | Select the Online Unit request email link.<br><br>A pre-formatted email message will display using your computer's default email system. |
| 3. Complete Online Unit email request form | Complete the Online Unit request email form by entering:<br><br>• Online Unit volume requested<br>• Your Insights Online administrator email address<br>• Notes or comments specific to your request. |
| 4. Send Email request form | Select send to deliver your Online Unit request email to your Insights Online administrator. |

## How do I view my Online Unit account balance?

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| 1. Select My Online Units Tab | From the Administrator home page, select the tab marked My Online Units.<br><br>The My Online Units pane will display. |
| 2. View Account Balance | The My Online Units pane displays the current unit value in your account, and offers options to view a transaction report, and request Online Units. |

## How do I transfer Online Units to another administrator account?

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| 1. Select Account | From the Groups and Accounts tree view, select the account you wish to transfer Online Units to. The User details pane will display. |
| 2. Open Credit Management pane | Select the ‘Manage Selected Account’s Online Units’ bar. The Credit Management pane will display. |
| 3. Review Online Unit Balance | Review the Unit Balance information displayed to ensure adequate online units are available to transfer. |
| 4. Enter Online Unit amount to transfer | In the Transaction Amount field enter the Online unit amount you wish to transfer to the selected account |
| 5. Select Credit | Select the Credit button to complete the transaction. The Balance information will be updated to display the new balance amount for both accounts.<br><br>Note: an automated email notification is sent to both parties confirming the online unit transaction. |

## How do I transfer Online Units into my account?

| | |
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| 1. Select Account | From the Groups and Accounts tree view, select the account you wish to transfer Online Units from. The User details pane will display. |
| 2. Open Credit Management pane | Select the 'Manage Selected Account's Online Units' bar. The Credit Management pane will display. |
| 3. Review Online Unit Balance | Review the Unit Balance information displayed to ensure adequate online units are available to transfer. |
| 4. Enter Online Unit amount to transfer | In the Transaction Amount field enter the Online unit amount you wish to transfer from the selected account |
| 5. Select Debit | Select the Debit button to complete the transaction. The Balance information will be updated to display the new balance amount for both accounts.<br><br>Note: an automated email notification is sent to both parties confirming the online unit transaction. |

## How do I view, save or print a report of my Insights Online Unit transactions?

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| 1. Select My Online Units Tab | From the Administrator home page, select the tab marked My Online Units.<br><br>The My Online Units pane will display. |
| 2. Select Transaction Report | Select the Transaction Report button.<br><br>A report definition screen will display in a new window. |
| 3. Set Date Range | Enter the desired date range in the Period From and To boxes. |
| 4. Generate Report | Select Generate to create a report.<br><br>The Transaction Report will display in a new window. |
| 5. View, Save or Print Transaction Report | View the multi-page report by using the scroll bars and/or selecting page number links at the bottom of each page.<br><br>To print or save the report, select Print. The complete report will display in a new window.<br><br>The report can be saved by highlighting the desired lines using ‘copy & paste’ to enter the data into another application.<br><br>The report can be printed by selecting your browser’s ‘print’ option. |

## Discovery Evaluator URL

The following are administrator procedures for using the MyURL feature in the Insights Online system. These procedures support the following Evaluator URL transactions:

- Creating an Evaluator URL
- Adding a Logo image to the Evaluator page
- Updating the Evaluator URL email address
- Sending an Evaluator URL to a recipient
- Importing a matched Evaluator
- Importing an unmatched Evaluator
- Locating an Inaccessible existing account
- Managing another account's Evaluator URL

### How do I create my own Evaluator URL?

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| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. Select Update | Under URL Details > Required select Update. |
| 4. Enter URL Description | Enter a description for your URL in the Description field |
| 5. Enter URL extension | Enter the URL extension you would like to display as part of the URL link. |
| 6. Select Update | Select the Apply Update button. Your URL will be registered with Insights Online.<br><br>A confirmation email will be automatically sent to the selected account, whenever their URL Details are successfully updated.<br><br>Note: The URL description may be changed at any time. To change the URL link please contact Insights Learning and Development. |

## How do I change the target email address associated with MyURL?

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| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. Select Update Logo | Select the Update button next to the Delivery Address field. The Update URL Delivery Address dialogue box will display. |
| 4. Enter new address | Enter a new email address in the field provided. Select the Apply Update button to confirm the change. A "Send Test Email" button is also provided to test the delivery of the MyURL output.<br><br>Note: Only one email address may be active at a time. Updating the email address may facilitate vacation coverage or role changes among administrators in your organisation. |
| 5. Select Close | Select the Close button to complete the process and return to the MyURL administration panel. |

## How do I add a logo/image to my Evaluator URL?

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| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. Select Update Logo | Select the Update button next to the Custom Logo field. The Custom Logo dialogue box will display. |
| 4. Select Image | Browse files to select the correct image. Select Update Logo to confirm the image and add it to your MyURL. |

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| | Note: The logo must be in the Portable Network Graphic (PNG) format, with a maximum dimension of 100 pixels by 100 pixels, and a maximum size of 50 Kbytes. |
| 5. Select Close | Select the Close button to complete the process and return the to MyURL administration panel. |

## How do I send my Evaluator URL to a recipient?

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| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. Select and Copy URL link | Select the URL displayed on the screen using your mouse or keyboard select function. Use the Copy function to copy the selected URL. |
| 4. Paste URL into email message. | Open a new email message form. Paste the URL into the body of the email message form. Add your message and/or instruction to the body of the email.<br><br>Enter email addresses for each recipient in the 'To:' field.<br><br>Note: Multiple recipients may receive and access the same URL. Individual information and evaluator data will be imported to Insights Online as individual accounts once recipients have each completed and submitted their evaluator data. |
| 5. Select Send | Select the send button to send your email to recipients.<br><br>An Evaluator Completion Notification email will be delivered to your inbox after each individual recipient completes their evaluator. |

## How do I import a Matched Evaluator to an existing account?

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|---|---|
| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. View URL Evaluator List | View the URL Evaluator listing to identify completed evaluators and accounts available for import to Insights Online.<br><br>Matched evaluators are records where the personal data submitted by the recipient matches an existing account in Insights Online (email address and/or logon ID). These are noted with a 'matched account' icon.<br><br>Hint: Roll over each record with your mouse to display the matched or un-matched status. |
| 4. Select the matched Evaluator account | Select once on the matched evaluator account name. The account will be automatically updated on the Group and Accounts tree, and the new evaluator will display under the account name.<br><br>The evaluator is now ready for purchase and download. |

## How do I import an Un-matched Evaluator to a Group folder on the tree?

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|---|---|
| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. View URL Evaluator List | View the URL Evaluator listing to identify completed evaluators and accounts available for import to Insights Online.<br><br>Un-matched evaluators are records where the personal data submitted by the recipient does not match an existing account in Insights Online (email address |

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| | and/or logon ID). These are noted with an 'un-matched account' icon.<br><br>Hint: Roll over each record with your mouse to display the matched or un-matched status. |
| 4. Drag and Drop the un-matched Evaluator account to a folder on the tree view. | Click and drag each un-matched evaluator account name to the desired folder on the Groups and Accounts tree. A new account will be automatically created in the target Group and the new evaluator will display under the account name.<br><br>The evaluator is now ready for purchase and download. |

## How do I locate an inaccessible account for a matched evaluator?

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|---|---|
| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select MyURL tab | Select the MyURL tab. The MyURL administration panel will display. |
| 3. View URL Evaluator List | View the URL Evaluator listing to identify completed evaluators and accounts available for import to Insights Online.<br><br>Inaccessible accounts are records that cannot be viewed by the administrator due to permission restrictions. The account exists in Insights Online, but is outside of the 'view' of the administrator.<br><br>An administrator with broader permissions must import the Evaluator data or move the account into your permissions area. |
| 4. Contact your Insights Online Lead Administrator, or your Insights contact person. | To locate the inaccessible account, contact your Insights Online Lead Administrator (within your organisation), or your Insights contact person.<br><br>The other administrator must either:<br><br>• Move the account into your tree view (account will become matched and available for importing) or,<br>• Import the evaluator data to the account at its existing location (account will remain outside your view). |

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| | Note: if any account that is included in a multi-rater profile (Team Effectiveness, Discovery Full Circle, Transformational Leadership), is outside the permission group (view) of an administrator, the profile will not be viewable by that administrator.<br><br>The evaluator will now ready for purchase and download by an administrator. |

## How do I manage another administrator's URL and/or Evaluators?

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|---|---|
| 1. Logon to Administrator Console | From your Insights Online home page, select the Admin Page text button. The Administrator Console will display. |
| 2. Select Account | Locater (search) and select the administrator account you wish to view. The User Details panel will display. |
| 3. Select 'Manage Selected Account's URL' | From the User Details screen, select the Manage Selected Account's URL bar. The URL Details panel will display.<br><br>The selected accounts URL, email address and logo will display and may be updated from this panel.<br><br>All completed URL Evaluators received for the selected administrator account will be displayed. Accounts and evaluators displayed may be imported using the standard procedures for those functions. |