

Frequently asked support questions

Employees frequently asked questions:

Calendar:

How do I link my calendar?

- Click on Link my Calendar
- Click on the calendar application you use
- Agree to the Cronofy Terms of Service and Privacy Policy
- Click "Link Calendar"
- Follow the steps as instructed to Link your Calendar

If I update my 1:1 meeting date/time from outlook or my email calendar system, does it automatically sync within Insights?

Our recommendation is to make calendar changes within Insights first and then it will automatically sync with your email system (as long as your calendar is synced).

1:1 Meetings/Scheduling:

How to Schedule a 1:1:

Option 1: If you have no upcoming 1:1's scheduled:

- Go to Me page, go to the "My Next 1:1's" area, click "Schedule" and follow steps #1-3 below.

Option 2: If you already have an upcoming 1:1 meeting and would like to schedule additional future 1:1's:

Go to Me page, click the "My 1:1s" link and click 'Schedule a 1:1' at the bottom of the page.

- Select the date, time, meeting length and location to meet with your Manager and click save.
- Once a 1:1 had been scheduled, you may begin to prep for the 1:1.
- A meeting notice will be sent to both you and your manager via email. Helpful Hint: Email notifications will be automatically sent to you 3 days and 1 day prior to your scheduled 1:1 meeting to remind you to Prep for it.

Meet Now, Reschedule or delete upcoming 1:1:

Meet Now:

- If you need to Meet now (rather than the original schedule day/time) you can click the “Meet Now” button to get started on your 1:1 meeting.
- Go to “My Team” page, click on “My Team 1:1’s, click the three grey dots (right hand side), select Meet Now.

Reschedule a 1:1 meeting:

- If you need to reschedule your 1:1 meeting, go to “My Team” page, click on “My Team 1:1’s, click the three grey dots (right hand side), select Reschedule.

Delete a 1:1 meeting:

- If you need to delete an upcoming 1:1 meeting, go to “My Team” page, click on “My Team 1:1’s, click the three grey dots (right hand side), select delete. Access your Past Team 1:1’s:
- To access past 1:1 meeting with your direct reports, go to My Team Page, go to the “My Team 1:1s” section, click the “My Past Team 1:1’s” (top right hand side).
- Locate the past 1:1 you would like to review. Click the “review” button to access your past 1:1.

Important Note: Users will not lose their prep as long as the meeting is rescheduled using the “Reschedule” option from the 1:1 options menu, however, if a user deletes the 1:1 and reschedules it, then the prep is deleted.

Tip! To learn more about the 1:1 process, check out our [Support videos](#).

Responsibilities

How do I add/edit my Responsibilities?

Edit a Responsibility:

- Click on the Responsibility you want to edit.
- Put your cursor on the front of the responsibility content (shown in black font).
- Once you place your cursor there, the font color will turn to blue for editing.
- Once updated, click “Submit for Approval” button on bottom right hand corner.

Delete a Responsibility:

- Click on the Responsibility you want to delete.
- Click the three grey dots on the top right-hand side within the responsibility card.
- Click delete.

- You will receive a warning popup asking if you're sure you want to delete this responsibility.
- Click yes, and your responsibility will now be deleted.

Tip! To learn more about Responsibilities, check out our [Support videos](#).

Goals

How do I add/archive/delete a goal?

Edit Goals:

- You can edit your goal after you have created it (even if it has already been approved by your manager).
- Click the Me tab (located at the top of the tool bar on the home page).
- Click "My Goals" tab, click on the Goal you want to edit.
- Edit the goal. Save again and click the "Submit for Approval" blue button (lower right-hand corner).

Delete/Archive Goals:

- Click the Me tab (located at the top of the tool bar on the home page).
- Click "My Goals" tab, click on the Goal you want to archive.
- Click on the three grey dots on the top right hand corner within the Goal form
- Click on Archive
- A warning notification will ask, "Are you sure you want to archive this goal?"
- Click "Yes" and a notification will get sent to your manager for final approval. Your goal will show as "awaiting final approval." Once your manager approves, your goal will be archived and no longer visible on the "My Goals" Tab on the Me Page.
- If you are a Manager and you are archiving a goal, you will be asked to "select a score, then click archive." Select the status score that applies and click "archive."

Tip! To learn more about Goals, check out our [Support videos](#).

Manager frequently asked questions:

How do I approve my Direct Report's Goals and Responsibilities?

- Once an employee adds a new goal or responsibility, the manager needs to review and approve it. The manager will receive a flag notification (upper top right-hand side) reminding them to review and approve the goal or responsibility.

- The manager can click on the flag notification which will show, for example, “Dave Johnson has updated a goal.” Click on the blue “review” link to proceed.
- To approve the goal, click the blue “approve” button (bottom right hand side).
- Edit the goal and send back to the employee, click “Send back to edit.” You will then be prompted to “Add a note for Dave” so Dave can edit as needed.
 - It is the same process to review, edit and approve a responsibility.

1:1 Meetings:

How do I reschedule, cancel or delete a 1:1 meeting?

Meet Now, Reschedule or delete upcoming 1:1:

Meet Now:

- If you need to Meet now (rather than the original schedule day/time) you can click the “Meet Now” button to get started on your 1:1 meeting.
- Go to “My Team” page, click on “My Team 1:1’s”, click the three grey dots (right hand side), select Meet Now.

Reschedule a 1:1 meeting:

- If you need to reschedule your 1:1 meeting, go to “My Team” page, click on “My Team 1:1’s”, click the three grey dots (right hand side), select Reschedule.

Delete a 1:1 meeting:

- If you need to delete an upcoming 1:1 meeting, go to “My Team” page, click on “My Team 1:1’s”, click the three grey dots (right hand side), select delete.

Important Note: Users will not lose their prep as long as the meeting is rescheduled using the “Reschedule” option from the 1:1 options menu, however, if a user deletes the 1:1 and reschedules it, then the prep is deleted.

Tip! To learn more about the 1:1 process for Managers, check out our [Support videos](#).

How do I access, print or export past 1:1 scores for my direct reports?

Access your Past Team 1:1’s:

- To access past 1:1 meeting with your direct reports, go to My Team Page, go to the “My Team 1:1s” section, click the “My Past Team 1:1’s” (top right-hand side).

- Locate the past 1:1 you would like to review. Click the “review” button to access your past 1:1.

Print 1:1 Meeting:

- To print a past 1:1 meeting with your direct report, go to My Team Page, go to the “My Team 1:1s” section, click the “My Past Team 1:1’s” (top right hand side).
- Locate the cogwheel/gear button (upper right-hand side) and select print.

Export 1:1 Meeting:

- To export a past 1:1 meeting with your direct report, go to My Team Page, go to the “My Team 1:1s” section, click the “My Past Team 1:1’s” (top right-hand side).
- Locate the cogwheel/gear button (upper right hand side) and select export. (It will export into a csv file).

Can I view my direct reports 1:1 meeting prep score before the actual 1:1 “Meet”?

Yes, the manager can view the employees prep with their prep scores prior to the 1:1 meeting.

- After the employee and a manager have completed their “Prep,” a manager can view the employee’s “prep” scores by going to: My Team > My Team 1:1’s > find the employee and click the blue “MEET” button.
- Both prep scores will be shown. (Be careful to not click the “We’re done” at the bottom as this will conclude the meeting).

Can a Manager view the employee’s Prep scores before the Manager completes their “Prep” for the employee?

No, a manager needs to first do their prep before they can see the employees prep scores. The employees’ prep scores will be shown side by side with the managers prep scores. (see screenshot below).

Can a Manager edit their Prep scores?

Yes, a Manager can edit their Prep scores before a 1:1 meeting, as long as the employee hasn’t completed their prep. But once the employees’ prep is complete, the manager will NOT be able to edit the scores.

To edit the Prep scores before an employee competes their 1:1 Prep, go to: My Team > My Team 1:1's > find the employee and click the three dots to the right of the blue "MEET" button. Select "EDIT PREP" to edit your prep scores.

System Administrator frequently asked questions:

Can I add/edit tasks, responsibilities and goals for other users?

Yes, as long as a user has the appropriate permission enabled.

To add a new Responsibility or Goal for a user:

Use the search tool at the top of Insights to search for an employee. Select that employees' responsibilities or goals tab. Click the "Add a Goal" or "Add a Responsibility" to add a new Goal or Responsibility.

To edit a Responsibility or Goal for a user:

Use the search tool at the top of Insights to search for an employee. Select that employees' responsibilities or goals tab. Click on the Goal or Responsibility you would like to edit. Type in the new or revised content for that Goal or Responsibility.

Reports:

Where do I access and run a report?

Insights has a selection of reports for employees, managers and leadership teams to access vital company trends and performance information.

- To access reports, go to your name (upper right-hand corner)
- Click on Reports from the dropdown menu and select the report you would like view.
- To export, or print, click the cogwheel on the right-hand side.
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Still have questions?

Contact us:

Support@Insightsapp.net