

## Setting up your team on Inspirometer

... enabling your people to gather their own meeting feedback

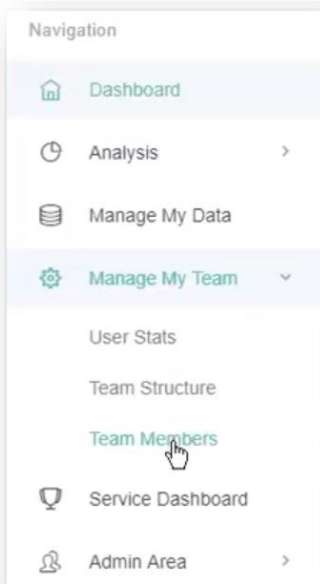
### Introduction

Inspirometer is great at empowering people to understand and improve the effectiveness of their own meetings, but it works even better when people can improve together and the leadership can track progress and identify where support may be required or organisational obstacles need to be addressed.

Setting up team members takes seconds. This guide provides a brief and straightforward explanation of how.



### Adding Team Members



To set up your team on Inspirometer, log into your account and click on manage my team in the left-hand menu (see left).

If you wish to simply add team members in a flat structure, click on the Team Members item. Here you will see your existing membership (see below) and, if you are using dummy data in a trial account, fictitious characters which you can use to test out the site's functionality.

By default, the screen shows 10 rows at a time, but you can change this here, see additional pages here, and search for specific characteristics here.

Name	Email	Department	Rights
Testing Testing	testing1234@tag-check.org.uk	SouthWest	Owner
Mike Clargo	mike.clargo@inspirometer.com	Western	Owner
Tester Today	t20180129@tag-check.org.uk	Western	Overview
sdfsdf sdfsdf	tutytyu@tag-check.org.uk	Western	Link Only

Showing 1 to 4 of 4 rows

To add team members, click on the green button in the top left corner. This will prompt you to submit their email address.

The check email button will review the Inspirometer database to test that they are not already included somewhere, and if they are not, it will open up a panel for you to add their basic details. Clicking the 'Create User' button will add them to your list.

Create New User

Email



## Organising Your Team Into A Structure

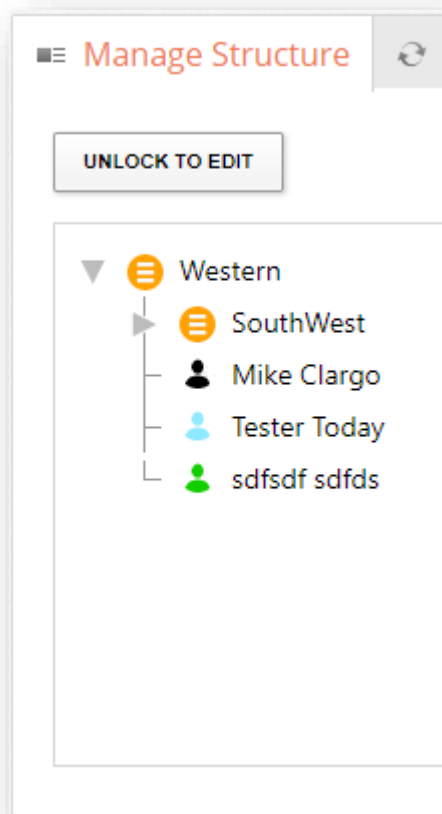
Within this process, you may have noticed an option to allocate your new user to a department (fourth box down).

You will also see departments listed in the third column of the user table shown on the previous page – clicking the entry will enable you to edit this value (indicated by the dotted blue underline).

If the group you are setting up is not a flat structure, this facility provides an easy way to organise people into subgroups. Multiple levels of subgroups can be arranged into a full hierarchical structure.

The 'Create New User' form includes the following fields and controls:

- Email:** Input field containing 't20180210@tag-check.org.uk' with a 'Check Email →' button.
- First Name:** Input field containing 'First name'.
- Last Name:** Input field containing 'Last name'.
- Department:** Dropdown menu currently set to 'Western'.
- Buttons:** 'Create User' (blue) and 'Cancel' (orange).

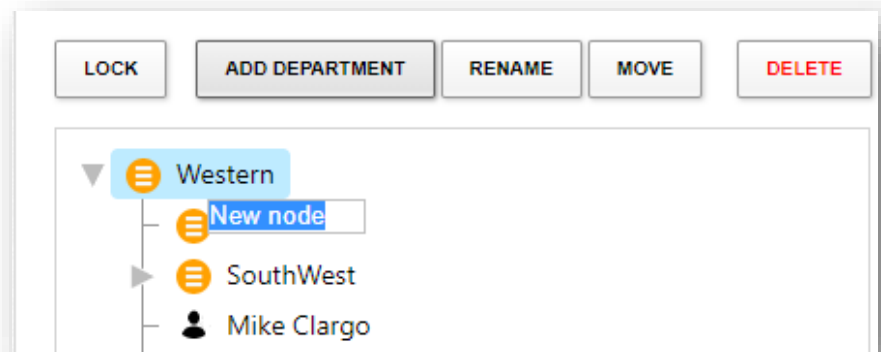


To set up the structure, click on Team Structure, under Manage my team in the left hand margin. Here you will see your current structure.

To edit this structure, click the 'Unlock to Edit' Button, and provide a reason (this is required to manage the risk of multiple people editing the same data in a large structure, such as a multinational).

Once your structure is unlocked, you can use the grey triangles to drill into the structure.

To add a new department, click on the department where you wish it to be created, and click 'Add department'. This will create a new node in the structure where you can type the name of the new department.



Deleting or renaming departments is just as easy - but remember to select the department first. You can even drag departments around and move people within them. It is important that you save your changes when you are prompted, and that you lock the structure when you have finished.

Once you have set up your new department names, these will be available when you add new users.

## Preparing Your Team

Please note, adding a user does not automatically alert them that they have an account - this enables you to set people up in advance of delivering any guidance to them, e.g. via a team meeting or training session.

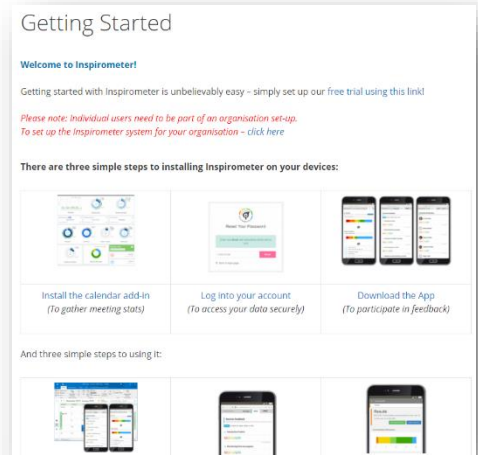
While Inspirometer is simple and intuitive to use, it still benefits from some basic guidance for its users.

Much of this guidance is available online, and we recommend that you point them toward <http://help.inspirometer.com/install/> as a means to integrate Inspirometer into their meetings and mobile devices, and to provide basic instruction on enabling and providing feedback (the videos on this page are typically just 2 minutes long).

However, we also recommend that you include some personal, business specific, guidance to augment the standard training.

It is particularly important that the reasoning behind Inspirometer, your intentions for it, and the benefits you are targeting through it, are clear, specific, and directly relevant to your team and their purpose – and that can only really be achieved through the personal touch.

We have found through experience that clarity over the ‘why’ delivered in this way has a huge impact on the take up and the eventual effectiveness of the tool.



## Assigning Permissions and Responsibilities

If you are setting up a large team, you may wish to appoint various leaders within the structure to administer their own teams within the structure. Inspirometer enables this by means of ‘permissions’ which can be assigned to specific individuals. This can be seen in the fourth column of the user table shown on page 1.

The permissions that can be set via this column can be seen below:

Permission (for their area) / Role	Owner	View/Edit	Edit	View	Overview	Overview/Edit
Adjust organisation structure	Yes	Yes	Yes	No	No	Yes
Add and delete people	Yes	Yes	Yes	No	No	Yes
See Department stats & performance	Yes	Yes	No	Yes	Yes	Yes
See individual stats (incl traffic lights)	Yes	Yes	No	Yes	Yes	Yes
See individual performance (feedback)	Yes	Yes	No	Yes	No	No
Change role of others (& permissions)	Yes	No	No	No	No	No

It should be noted that everybody within the structure can see their own data and feedback irrespective of the permissions set. The permissions only concern the ability to organise and view others.

Only one role, that of ‘owner’, is able to set these permissions, furthermore they can only set permissions for the area in which they are situated (and below). The responsibilities required of every organisation under GDPR mean that access to individuals’ PII needs to be carefully and demonstrably controlled. ‘Ownership’ permissions are the mechanism through which that responsibility is either effected, or potentially undermined, and it is therefore vitally important that ownership permissions are restricted, and through that all other permissions.

It is anticipated that each organisation will have their own approval and documentation mechanisms in respect of this, and no attempt has been made to duplicate this within Inspirometer. However, Inspirometer does log all permission changes and authorisations in the event of any issues.



Where individuals are granted permission to see the results of others, they are required by the Inspirometer system to agree to the following conditions. Declining these conditions will revert the permission. The conditions are required to both comply with GDPR, and to ensure the relevant Inspirometer terms and conditions in respect of management approach.

### Code of Practice

A request has been made to grant you permissions which will enable you to see the Inspirometer results of other people.

To fulfil this request, and in compliance with legislation concerning General Data Protection Requirements (GDPR 2018), we need to confirm that this will not create any undue risks for the privacy of the individuals concerned and their data.

We therefore ask you to confirm your adoption of the following charter in respect of other individuals' Inspirometer feedback data\* and its use. (\*Feedback data refers to any data provided through individual use of feedback tags, but does not include usage statistics).

I will:

- Respect the confidentiality of all individuals' feedback data
- Seek to use feedback data to help individual or collective improvement
- Be sensitive and supportive in my use of feedback data
- Ensure secure passwords to prevent unauthorised access to feedback data
- Delete and destroy all feedback data records if my situation changes

I will not:

- Use feedback data to coerce any behaviour beyond that which is willingly given
- Use feedback data except to coach and support improvement activities
- Present feedback data to third parties in a way that individuals can be identified
- Do anything that risks creating the impression that confidentiality is compromised
- Hold or transport feedback data on unsecured devices

For more training videos, please visit [help.inspirometer.com/train](https://help.inspirometer.com/train)

## How did we do?

Please rate the usefulness of this guide to you  
All it takes is one simple click ...

