



Upgrade Preparation Checklist

PI2 Software Data Transfer Recommendations

To ensure a confident and smooth transition to the upgraded PI software experience, we encourage you to use this checklist to prepare for your software upgrade.



User List

1

Take a look at your User list and determine which users you want to remain active and what access level they'll need for PI2.

[Resource here.](#)

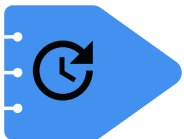


Job Targets

2

Audit your Job Target list and review which targets are finalized and if there are any that should be removed or archived before your PI2 migration.

[Resource here.](#)



Open Links

3

You'll need to update your Open Invitation (OI) Links in the new platform. Take an inventory of where you've embedded assessment links (in recruiting emails, email templates, HRIS/ATS systems, etc) so that you don't have interruption of service.

[Resource here.](#)



Employee List

4

The Person Type is being streamlined in PI2. In order to have clean data, we recommend you export your completed assessment list and review who is marked as Candidate/Employee, as well as updating current employees with their work email. Post-migration, you'll have a chance to review any uncategorized transfer data.

[Resource here.](#)

Need a hand? Check out our partner Believable Magic for data clean up services.

Questions? We're here at support@mindwiregroup.com



Human Capital. Optimized.





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PI2 Software



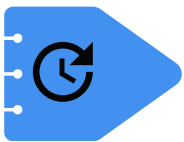
User List

- Export active user list
- Identify any users who need to be deactivated and disable access
- Determine new access levels for each user or user type



Job Targets

- Export or review all Jobs in PI Software
- Determine any outdated jobs that need to be either updated or archived/removed
- Build a next steps timeline for updating or creating new Job Targets



Open Links

- Identify where you've embedded open links and if those links need to be altered
- Inform any staff who use Open Links of the upcoming change or new links to use
- Create new links in the PI2 software



Employee List

- Export completed assessments to review data
- Compare your org chart with your export
- Update employee data by changing each to the Employee type (not Candidate/Other)
- Correct emails to current work email
- Identify any data of employees who are no longer with your organization and remove or archive their results

Need a hand with your data clean up? Check out our partner [Believable Magic](#).

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