

Upgrade Preparation Checklist



We're excited to share our new and improved Talent Optimization platform, designed to streamline functionality, improve collaboration, and reduce administrative burden. To ensure a confident and clear transition to this upgraded PI software experience, we encourage you to leverage this checklist to prepare for your software upgrade.

TAKE ACTION



Review your employee emails

Ensure that your employee emails match your organization's email domain. This will enable all of your employees to appear in the Employee Directory as well as the Inspire platform.



Review your folders

We recommend deleting empty folders and reviewing the contents of your folders to see what jobs and/or people records can be deleted. [Learn more about the changes to folders.](#)



Review and prepare your Open Invitation (OI) links

Any OI links unrelated to jobs will be disabled at the point of upgrade. Check where these links have been distributed in your organization, such as on your website or in email signatures, and update them accordingly. The ability to send assessments via custom OI links will only be available in Hire. Any existing candidate links you have active from Legacy will be imported into PI2; however, these links will no longer be able to be modified. All other links will be sunsetted. [Learn more about the changes to OI links.](#)

LEARN MORE

Review the redesigned permissions

We've redesigned how user roles work. Not only are we making these roles more intuitive, but we're giving you greater control over how you use them.

To ensure a smooth upgrade process in PI2, we've given users default permissions that correspond with their Legacy user roles. We recommend reviewing your permissions before your upgrade date or setting aside time to make adjustments once you upgrade.

[Learn more about the changes to permissions](#) and their structure ([access levels](#)), including some [default recommendations](#) based on role and responsibilities at your organization.

Register for an Upgrade Webinar

We'll host a weekly [Upgrade Support Webinar](#) so you and your colleagues can ask questions and learn best practices directly from our software experts.

Review our Upgrade Guide

We recognize that this change may feel new or uncomfortable at first. However, we are committed to ensuring you love the new experience as much as we do. We've created this [Upgrade Support Resource](#) to help you navigate these changes, and we're available to answer any questions you have.

Logging in for the first time

The first thing you'll notice when you enter the upgraded software experience is a new and modernized feel. The dashboard you know and love isn't going anywhere. However, we still need time to give it the quality update it deserves before launching it.

Review feature name updates

Some features have new names. You can [review them here](#).



Bookmarking these links will help you navigate your upgraded experience:

[PI Basics - Build your PI Foundation](#) | [PI Documentation Center](#) | [Product feedback page](#)
[Release notes page](#) | [Upgrade Support Webinar](#) | [Upgrade Support Resource](#)