

# Upgrade: What to know

We're excited for you to explore PI2 for yourself.  
Here are a few tips to help you make the most of your new experience.

## TIPS BEFORE UPGRADING

### Preview the software

PI2 has been designed with a fresh look and feel. To preview the new experience, view [our platform walkthrough](#).

### Note any active assessment links

Any existing assessment invitation links marked as "candidate" type will be imported into PI2. However, please note that imported links cannot be modified. We recommend you take inventory of where you've embedded assessment links (in recruiting emails, email templates, etc.) so you can [update them with new PI2 links](#) post-upgrade. **Important:** Links marked as "employee" or "other" will not be imported into the new experience, and will no longer function.

### Prepare for your upgrade

As you navigate these changes, we are committed to your success. Visit our [Upgrade Support Resource](#) to read about PI2 in greater detail. If you'd prefer to learn directly from our software experts, join one of our weekly [Upgrade Support Webinars](#).

## LEARN MORE

### Data transfer

All of your people records will be transferred as part of the upgrade process. Any people not classified as "employees" or "candidates" will be accessible via a dedicated "Transferred People" page. You can [view and reclassify those people](#) at any time.

### User permissions

We've redesigned user roles in PI2 to give you greater flexibility and control in how you use them. To ensure a smooth upgrade process, we've given users default permissions that correspond with their legacy PI user roles. [Learn more about these changes](#).

### Notable name changes

Some features have been streamlined, sunsetted, or given new names. You can [review them here](#).

### Welcome Guide

After your account is upgraded and you log in for the first time, click the book icon in the top-right of your screen. A "Welcome Guide" will open sharing key information about PI2. [Click here to learn more](#).

### Have questions?

Reach out to us at [productupdates@predictiveindex.com](mailto:productupdates@predictiveindex.com) with any questions related to your upgrade experience.



### Helpful links to bookmark:

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