This guide covers the top five updates in the Predictive Index software and a selection of step-by-step tutorials.

What’s new?

- Intuitive Navigation
- People and Positions Pages
- New Pattern Design
- Introducing: the Job Pattern
- Mobile/Tablet Friendly

PI Software Tutorials

- Sending a PI Behavioral Assessment via Email
- Viewing PI Reports

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What’s new?

The goal of the new Predictive Index software is to help you do all of the things you do today, but more easily. We redesigned the user experience so you can find things and complete tasks faster.

Intuitive Navigation

The navigation in the new PI software was designed to highlight the actions people perform most: managing your assessments (Browse), sending out new ones (Assess) and utilizing reports, guides, and group analytics (Analyze). Search is featured much more prominently at the top of every page and is the most powerful way to find what you’re looking for, fast.

You can access “My Groups” from the navigation bar at any time (formerly called “Workspaces”), as well as any Administration functions you have access to and your Profile settings.
The updates to the PI behavioral pattern were made to be more in line with how PI workshops teach you to read the pattern, while at the same time incorporating a modern, sleek design.

- PI workshops teach you to read the behavioral pattern relative to the mid-point, so the pattern is now centered on the mid-point
- Sigma lines for easier identification of “moderate”, “very” or “extremely” behaviors
- The letters are inside the dots for simpler tracking
- The M factor is now displayed as a “thermometer”, so it is still simple and straightforward to measure Morale
- Incorporation of colors; PI patterns are blue, PRO patterns are green
The Person page is created in the software as soon as you send a PI Behavioral Assessment to someone.

- Aggregates information about an individual in one place
- Allows you to perform some tasks and actions for this person
- A powerful feature of this page is the ability to associate a Person with a Position in the Person Summary section
- As long as there is a Position associated with this Person, you unlock Interview and Coaching Guides right on the Person’s page
The Position page is created when you send a PRO assessment or associate a PI behavioral assessment invitation with a new Position.

- The “Final PRO” has been renamed “Job Pattern”
- This name change makes it easy to distinguish between the results of a PRO assessment (filled out by an individual) and the Job Pattern – which describes the agreed upon behavioral requirements of the Position
- Because you can associate People with Positions, you can see all associated People on the Positions page.

The wealth of information and the actions you can perform on these pages put a lot of connective power right at your fingertips.
Introducing: the Job Pattern

The Job Pattern creation process was designed to promote team collaboration while remaining easy to use. Once you select PRO Assessments to incorporate into the Job Pattern, you can adjust and tweak the Job Pattern using +/- buttons or click-and-drag functionality. This gives you granularity during the discussion with your colleagues to determine where each factor should lie.

If one of the stakeholders is not familiar with PI Factors, you can easily pop up a description of each factor by selecting the name of the factor.

This Job Pattern will be displayed throughout the software where that Position appears, and will be used to make Interview and Coaching guides for the Position.
Mobile/Tablet Friendly

The Predictive Index software is entirely responsive, which means the website automatically resizes to fit the screen of the device you’re using. Everything you can do on a desktop computer can now be done from a mobile or tablet device, meaning the power of PI isn’t confined to your office desk!
**PI Software Tutorials**

A brand new *Knowledge Center* is available to all PI software users. The following are two example step-by-step tutorials that are available in the Knowledge Center, alongside dozens more. Knowledge Center articles can be found linked throughout the PI software.

**Send a PI Behavioral Assessment via Email**

Complete the Send an Assessment: PI form to send a PI Behavioral Assessment invitation. The email includes a link and survey instructions. When you send the assessment, the PI software creates a new Person and links the person to a Position. It is strongly recommended that you complete all fields on the form to get the most out of the software’s browsing and searching capabilities.

When the survey is complete:

- you receive an email notification
- the survey is scored
- results are saved in the PI Software
- results are saved on the Person page for each Person

**Start a PI Behavioral Assessment**

1. From the Home page, select **Send an Assessment** from the ASSESS menu.
2. Ensure that **Predictive Index (PI)** Type is selected.
Add Recipients

1. In the Recipients section, enter the recipient’s First Name, Middle Name (optional), Last Name, and Email Address.

2. As you type, the software lets you know if you are entering a recipient that already exists. If the recipient already exists, click Resolve and select an action:
   - Use Selected to send a survey to an existing recipient
   - Continue New to create as a new recipient

3. Select the gender to specify the pronoun to be used in reports.

4. Click ADD ANOTHER to send the assessment invitation to more recipients, or skip to the Important Information section if you have entered all recipients.

Enter Important Information

1. Choose a folder location for the person completing the assessment. Initially, your default folder, defined in User Settings, appears.

   Note: You must have the correct folder permissions to change the folder location.

2. Associate the recipient with a Position and Department within your organization.
3. Associate the recipient with a Person Type:

- **Unknown** – Default. This Person's Type is unknown or has not yet been defined.
- **Other** – External business partners or non-company personnel (vendors, recruiters, translators, etc.)
- **Candidate** – Candidate for a position.
- **Employee** – Employee of the company.
- **Former Employee** – Former employee who is no longer with the company.

**TIP:** You can filter on Position, Department, and Type when you search assessments.

**Customize Email Details**

Customize the Subject, Message, and Language for this email.

![Email Details](image)
Change Sender Information

You can also customize sender information if it differs from the default settings.

1. Click **EDIT**.

![From Administrator* EDIT
The General's Fish & Tackle
Mark Pope
555-555-5555
markpope@general.com](image)

2. Modify the email sender information.

![From Administrator* CANCEL
First Name
Mark
Last Name
Pope
Phone
555-555-5555
Email
markpope@general.com](image)

Send the Assessment

Once you have completed all fields, review the form and click **SEND** to send the assessment invitation.

The assessment appears in **Pending Assessments**.
Viewing PI Reports

The PI Report describes the PI behavioral pattern for a given Person. The report also provides a set of suggestions as to how to best manage that Person in the workplace. The results of the PI Behavioral Assessment should always be reviewed by a trained Predictive Index® practitioner. See Understanding the PI Report.

If you are configuring reports for multiple individuals, the PI software applies the settings you select to the reports for all individuals. You can use the Group feature to assemble the individuals for the report before you begin. These instructions explain how to create and view a report from the PI Report menu. You can also create a report from a Person Details page or from a Group action page. See also Email, Printing, and Downloading Reports.

Start the Report

On the Home page, select PI Report from the ANALYZE menu.
Select the Person (or People)

1. In the People section, click **ADD**.
2. On the Select one or more people page, browse through the folders, select a **Group**, or use the **Search** feature to find individuals to include in the report.

![Select One Or More People](image)

3. Click **ADD** for each Person you want to add to the report configuration.
4. When you are finished adding People, click **DONE**.
Configure the Report

1. In the Configuration section, select the following options for each Person:
   
   - **SURVEY DATE** – Select the Person's PI graph from the menu in the Survey Date column. By default, the Person's original PI graph or most recent Combined PI is selected. You can click View to see the survey results.
   - **EXISTING REPORTS** – Choose an existing report (if one exists) or accept the Don't Use Existing option to create a new one.
   - **GENDER** – Select the gender to specify the pronoun to be used in reports.

![Configuration Table]

2. Set the OPTIONS for the report. These options apply to the reports for all individuals.

   - **Language** – Accept the default Language or select a new one.
   - **Options Sections** – Select optional sections like Management, Influencing, and Selling Style to include in the report.

3. Click **VIEW REPORT(S)**.

![Options Section](image_url)
View Reports

1. If the reports are collapsed, expand a report on the screen by clicking the Person's name or the blue arrow. The report appears on the screen.

![REPORTS](image)

2. You can share, download, modify or delete the report:
   
   - To email, print, or download this report, click the share buttons.
   - To share multiple reports, click individual checkboxes or **Select All** and select a method of sharing from the group share menu.
   - To modify the report text, click the pencil button, make your changes and name your customized report.
   - To delete the PI report, click the trashcan button.

Contact Us

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