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CERTIFIED Partner

PI SOFTWARE
User Guide

HUMANOSTICS®

START LEARNING

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OVERVIEW

THE FOUR DISCIPLINES

PI SOFTWARE

PI Software is a four discipline platform designed to help you overcome people challenges in different contexts and stages of the employee lifecycle.

We advise you to start with the ESSENTIAL disciplines of PI which are **HIRE** and **INSPIRE**.

These are fundamental and a foundation for working with **DESIGN** and **DIAGNOSE**.

DIAGNOSE

Measure engagement and analyse the results to prescribe the remedies. Make strategic changes to boost performance.

WORK WITH

Engagement

DESIGN

Create a link between the strategy and results. View individual and team strengths relative to the objectives.

WORK WITH

Teams

INSPIRE

Work with the existing workforce to motivate, engage, develop and retain employees and managers.

WORK WITH

Employees
Managers

HIRE

Run a job analysis (PI JA) and assess people with PI BA and PI CA to match the person to the job requirements of the job.

WORK WITH

Jobs
Candidates

WATCH DEMO

FIRST STEP

Watch this 3-minute video for an introduction to the entire PI solution.

GO TO 'FIRST LOGIN'

NEED HELP ?

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FIRST LOGIN

YOUR COMPANY NAME

Search

YOUR USER NAME

Browse | Design | Hire | Inspire | Diagnose | Learn

Send Assessments

Create a New Job

NAVIGATION PANEL – TOGGLE BETWEEN DISCIPLINES

Smooth navigation between disciplines. Just like in the software this guide is interactive - click to go to the desired content.

IF YOU ARE THE OWNER OF YOUR ACCOUNT

!

Ensure the account is set up a with folder structure that reflects your organisation and create new users with proper access.
Set up the anonymisation process, to comply with GDPR.
If you are the account owner navigate to this site.

FIRST STEPS 1 2 3

SITES TO BOOKMARK 1

LOGIN SITE for the PI Software platform. Choose your preferred login language and enter your user ID. Your user ID is your email address. If you forget your password, reset from the login site.
Recommended browser: Google Chrome.
Internet Explorer is not supported.
Always ensure your browser is updated.

YOUR NEW BEST FRIEND – Short how-to-videos on different functionalities in the software.

LEARN is the support center where you can find manuals, instructions, videos etc.
Use PI Software login credentials to enter.

ACTIVATE 'SHOW COGNITIVE DATA' 2

If a blue banner says 'Cognitive Data Hidden', go to your name in the top right corner and click 'Show Cognitive Data'. If the banner is not present and you don't see cognitive data, this has not been activated for your user.
Contact your system administrator or contact us.

Cognitive Data Hidden

FAMILIARISE WITH THE SOFTWARE 3

Some enjoy jumping head over heels into it and test/try the functionalities. Some prefer guidelines and instructions.

We advise you to go through this guide and/or to return to it when you want to explore the content of what is available under each discipline.

GO TO 'BROWSE'

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Browse | Design | Hire | Inspire | Diagnose | Learn

Send Assessments | Create a New Job

BROWSE 1/2

BROWSE

CONTENT

1 Dashboard
2 Assessment Center
3 Folders
Teams
Organization
Employee Directory
Analytics

DASHBOARD

The Dashboard is your entry page when you login to PI Software, which provides a quick overview of ongoing activities

1 DASHBOARD - Your overview of ongoing activities

RECENT TEAM ACTIVITY

An overview of your teams and teams shared with you. A shortcut to continue your work with a team. Click on the individual team names or click 'VIEW ALL' to see more.

RECENT JOB ACTIVITY

An overview of the positions that you are recruiting for/working on. Look at them individually by clicking on them, or view your complete job directory by clicking 'VIEW ALL'.

RECENTLY COMPLETED

This section displays recently completed person assessments. Click on a name to view assessment details or click "VIEW ALL" to get a complete overview.

PENDING ASSESSMENTS

This section displays the status of assessments that have not yet been completed and allows you to resend invitation links. Click "VIEW ALL" to get a complete overview.

2 ASSESSMENT CENTER – Send PI BA and/or PI CA invitations

'Invite by Email' is the standard way to send assessment invitations. Enter HIRE to explore the other methods for sending assessments.

Invite by Email | Bulk Send by CSV | Invite by Link | Checklist | Add by Score ID

3 FOLDERS – See the folder structure and enter folders with stored assessment results

The folder tree can be expanded to display the hierarchy of subfolders. Click on a folder to view its content and click on a record name to view details.

MOVE OR CHANGE 'TYPE'

Upon completion of a recruitment, update the type for the hired individual(s) to 'Employee', by tick-marking the record(s) and clicking 'Update Type' in the 'Admin' dropdown to the right. To move a record to a different folder, tick-mark the record(s) and choose 'Update folder' in the 'Admin' dropdown.

GENERATE REPORTS

To create reports for people, tick-mark them and click on the desired tab at the top. If you wish to export data to Excel, select the people and choose 'Download CSV' in the 'Admin' dropdown to the right (only available for software administrators).

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BROWSE 2/2

BROWSE

CONTENT

4 TEAMS – work with plotting your people into teams for an easy overview and shortcut to work with them.

'Teams' is a way to work with profiles without moving them from the folder they are located in. This is particularly useful when you are dealing with cross-divisional teams, management teams etc. The Teams you create are unique to your login but can be shared with other users of the account.

CREATE A TEAM

Click the button + Create a New Team to create your team. Name your team and add people by typing their names and selecting from the displayed. Click 'Create Team'.

You can now run a Team Discovery analysis (if you have access to it) or create reports for some or all profiles in one go. Tick-mark the record(s) and go to the desired tab at the top.

ENTER OR EDIT A TEAM

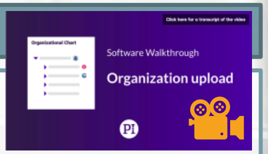
To enter a team, click on the name and click •••

Use 'Edit Team' to add or remove profiles (when you remove a profile, they are removed from your team, but not from the software).

Use 'View Details' to generate reports.

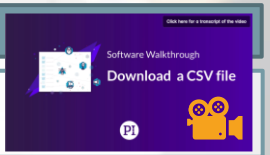
Use 'Share Team' to allow other users to see your team.

5 ORGANIZATION – a functionality to display the organisational hierarchy and which people who have completed the PI BA.



Upload and maintain your organisational data in PI Software and efficiently send the PI BA to all your employees.
View more details under DIAGNOSE.

6 EMPLOYEE DIRECTORY – a complete overview of all person records categorised with the type 'Employee'.

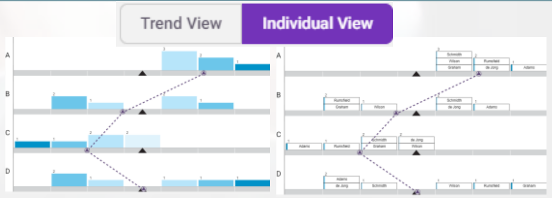


This section displays all the employees in your company that you have access to. From here you can create individual reports or reports for several people in one go by tick-marking them, and you can move people between folders. Export data to a CSV file.

7 ANALYTICS – plot employee or candidate BA data into an overview to identify similarities, differences, trends, gaps etc.

Analytics provides an overview of behavioral profiles for a group of individuals. You can use it for a visual overview of candidate profiles with an overlay of the job target, or for existing teams. Start typing the name of your team or an individual to add them to the plot. Click 'Create Report'. Use it to identify similarities, differences, trends and gaps and work with your teams.

Click on 'Individual View' to see the names of the people in your plot.



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YOUR COMPANY NAME

Search

YOUR USER NAME

Browse | Design | Hire | Inspire | Diagnose | Learn

Send Assessments | Create a New Job

DESIGN

DESIGN

Create a link between the strategy and results. View individual and team strengths relative to the objectives.

CONTENT

1 Team Discovery

FIRST STEP

Watch this 6-minute video about the DESIGN discipline

WATCH DESIGN DEMO

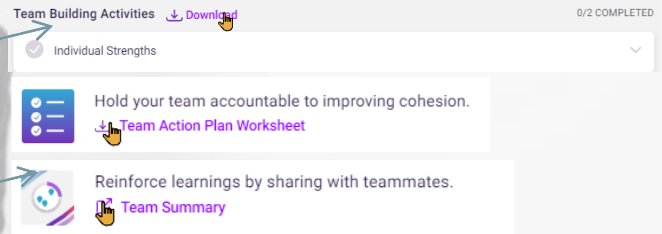
In PI LEARN you can access a resource center for working with Team Discovery.

Team Discovery is designed for live software usage to work with a team in the context of objectives.

1 TEAM DISCOVERY - Your teams in a strategic context — RESOURCES

First 'Create New Team' or type the name of an existing team. Unfold the sections under 'Team Building Activities' for an understanding of the flow. Download and share the worksheet with participants. Follow the steps and click 'Next' when ready.

Follow the steps (also presented below) throughout the analysis by unfolding the sections under 'Team Building Activities' and print the Action Plan template and Team Summary.



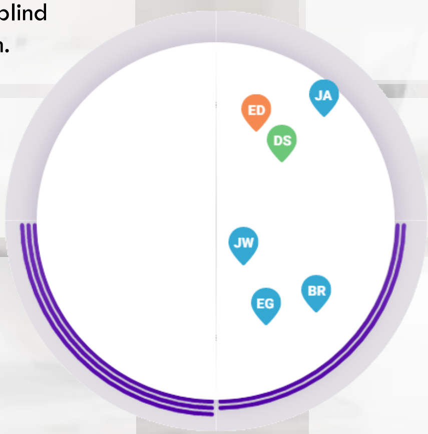
PART 1 – ANALYSE THE TEAM

Pathfinding

1 INDIVIDUAL WORK STYLES
Deeper self-awareness of individual strengths, potential blind spots, and areas of synergy and conflict within your team.

2 TEAM TYPE
Understanding your team's makeup, including strengths, potential blind spots, gaps, and trouble areas.

3 TAKEAWAYS - ACTION
Science-backed recommendations to create an action plan to build a more collaborative team.



PART 2 – DESIGN FOR STRATEGIC ACTION

Executing

OBJECTIVES 1
Determine strategic priorities to unlock insights about your Team Type in the context of your work objectives.

TEAM TYPE + OBJECTIVES 2
See yourself, your team, and your strategy in one place to identify alignment and gaps to drive results.

TAKEAWAYS – ACTION 3
A clear path forward, based on scientifically-backed recommendations, to begin building and aligning teams that deliver results for your business.

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SHORTCUTS to send BAs and/or CAs or Create a New Job.

HIRE 1/2

HIRE

Run a job analysis (PI JA) and assess people with PI BA and PI CA to match the person to the requirements of the job.

CONTENT

1. Create a New Job
2. Set a Job Target

- Assess Candidates
- Review Candidates
- Interview Candidates
- Onbard New Employee

FIRST STEP

Watch this 6-minute video about the HIRE discipline

WATCH HIRE DEMO

1 CREATE A NEW JOB - Your go-to place when a hiring process begins

Enter the name of the position you are hiring for. Include a job description if you like. Next, you will be able to choose the closest benchmark occupation for the job. This will give you an idea about what other companies typically look for when hiring for this position. If none are suitable select ‘no close match’.

2 SET A JOB TARGET – Determine the ideal profile and cognitive capacity for the job

Choose one of the three options below to set your job target.

‘GUIDED JOB TARGETING PROCESS’ – gather stakeholders on site and complete the PI JA on the screen.

‘SEND TO STAKEHOLDERS’ – Send email to stakeholder(s) to give input. Note that invitations are sent in your login language. The completion language can be changed subsequently by the stakeholder(s).

‘SKIP AND SET TARGET MANUALLY’ – drag and drop the factors along the continuums and set the cognitive target manually.

IMPORTANT: REACH CONSENSUS BEFORE YOU MOVE ON

It is important to create consensus amongst stakeholders before you create the final job target. To start this process, click ‘SET JOB TARGET’.

The system will show you the combined behavioral target and cognitive target of the position. If you have multiple inputs, the result is an average of the stakeholders’ input. You can define and adjust the behavioral and cognitive targets by dragging manually, and you can select the weighting between the two. When you are ready, select ‘ACCEPT JOB TARGET’. Print the Job Report from the tab above the behavioral target.

If you need to change a job target, you can administer stakeholder input from ‘Modify Target’ and ‘Manage Stakeholder Input’

HIRE 2/2

HIRE

Run a job analysis (PI JA) and assess people with PI BA and PI CA to match the person to the requirements of the job.

CONTENT

3 ASSESS CANDIDATES – Issue assessment invitations to PI BA and/or PI CA

Invite by Email | Bulk Send by CSV | Invite by Link | Checklist | Add by Score ID

INVITE BY EMAIL

Type email or name of the recipient and click 'Add New Person'. Select the 'type' (candidate/ employee) and folder and link to a job target. Add more people to send multiple invitations in one go.

BULK SEND BY CSV

Create a lot of people and send assessments to them from 'Bulk Send by CSV'. Download and fill in a csv template, allowing you to send assessments to everyone in one go instead of individually.

INVITE BY LINK

Generate a unique link (URL) that candidates use to register their name and email and take a PI BA. You can also choose to have a link to a PI CA sent to them by email subsequently.

CHECKLIST

Download a paper version of the PI BA for a candidate to fill in by hand, after which you can upload the answers. This is only recommended when the candidate has no access to a computer.

ADD BY SCORE ID

If a person has a PI BA result that is not in your system, enter the unique behavioral score ID and regenerate the person's profile. The 10-digit code is shown under the synthesis graph.

4 REVIEW CANDIDATES – Compare candidates to the job target and view match scores

Select the job title from the list on the dashboard or find it by using the search field. The job target you set earlier is shown along with the list with candidates. Tick-mark one of the candidates to view their profile compared to the target. You can click on the heart icon to mark a candidate as a favorite for the job. 'Other Matches for This Job' displays other matching people in the account not linked to this position.

MATCH SCORES. The software presents a behavioral match score, a cognitive match score, and an overall match score for each of the candidates. The scores range from 1 to 10 where 10 is a perfect match.

5 INTERVIEW CANDIDATES – Create interview guide(s)

When you have decided which candidates to interview, go to their person page by clicking their name or searching for them.

Generate the interview guide and prepare your interview. Watch this video about the 'Person Page' to explore a person.

6 ONBOARD NEW EMPLOYEES – Prepare the onboarding kit

Search for the person you are onboarding. Select language and choose relevant report(s) to include. Send the reports to the Manager. Consider the employee's profile when you create the onboarding program.

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INSPIRE

INSPIRE

Work with the existing workforce to motivate, engage, develop and retain employees and managers.

CONTENT

FIRST STEP

Watch this 7-minute video about the INSPIRE discipline

WATCH INSPIRE DEMO

1 PEOPLE – Generate reports for existing employees to create self awareness and improve working relationships

UNDERSTAND A PERSON

Click on the name of the employee you want to work with. This takes you to the person page. Create a report by clicking on the desired report to the left. Use the Person Report and the Behavioral Report to work with increasing self awareness and the Personal Development Chart and the Coaching Guides to work with development.

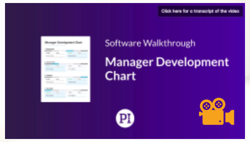
RELATIONSHIP GUIDE

In the left-hand menu, select another person to generate a relationship guide. This compares two people and presents the strengths and caution areas of their relationship along with tips to collaborate more effectively.

2 MANAGERS – Generate reports for managers to increase their self awareness and provide tools for them to work with their employees

MANAGER DEVELOPMENT CHART

Click on the report and add the person(s) to generate the report(s). You use the Manager Development Chart to work with increasing self awareness as a people manager.



MANAGEMENT STRATEGY GUIDE

Use the Management Strategy Guide to provide the manager with a tangible guide to manage an employee.

COACHING GUIDE

Use the Coaching Guide to provide the manager with developmental questions / reflections when comparing an employee's behavioral profile to the job target of their current role.

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DIAGNOSE

DIAGNOSE

Measure engagement and analyse the results to prescribe the remedy. Make strategic changes to boost performance.

CONTENT

1 Employee Experience

FIRST STEP

Watch this 6-minute video about the DIAGNOSE discipline

WATCH DIAGNOSE DEMO

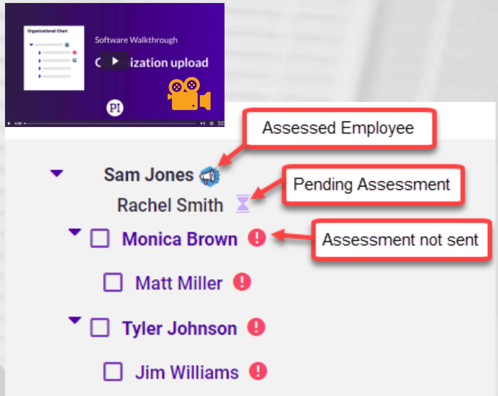
In PI LEARN you can access a resource center for working with engagement.

1 ACTION CENTER - Upload organisational data and administer the PI Employee Experience Survey (PI XP)

PRE-SURVEY

UPLOAD YOUR ORGANISATIONAL DATA
Download the CSV template to enter your people data. Choose the folder to store BA's in and click 'Upload'.

YOUR ORG STRUCTURE
Upon successful upload, you will find an overview of your organisational hierarchy. Icons next to each individual show whether they have done the BA and if so, what their reference profile is. Select the individuals who have not been assessed and send out an invitation to take the PI Behavioral Assessment in one go.



With the structure in place, next PREVIEW your Employee Experience Survey and an example report.

SCHEDULE a release date for your survey. Make sure to leave room for the readiness emails.

SEND READINESS EMAILS to managers and employees 1-2 weeks prior to the survey.

DURING SURVEY

SCHEDULE REHEARSAL MEETING with your consultant, MONITOR SURVEY participation and CLOSE YOUR SURVEY

POST SURVEY

Upon closing the survey, the results are available for download. A range of steps should now be initiated, and we advise you to consult your PI consultant for advice.

1) Review results
2) Schedule a session with your consultant
3) Run executive debrief presentation
4) Debrief managers and share team reports
5) Schedule 'Take Action on Engagement' workshop
6) Communicate results to the organisation
7) Make action plans and execute on them
8) Reflect & adjust

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LEARN

LEARN

CONTENT

- Support Centre
- Ebooks
- Courses
- Certifications
- Webinars

The LEARN platform is a resource to explore information on various topics and find follow-up material to continue your education of PI. You can attend courses and complete certifications – all available to you at no added cost.

LOGIN

You use the link from the top menu in PI Software to enter LEARN. Your login credentials are the same as to the PI Software platform.

WE RECOMMEND VISITING

GENERAL

- What is PI?
- How Does PI Work?
- Predictive Index Overview
- Using Assessments
- The Four Factors
- Factor Combinations

DIAGNOSE

- THE DIAGNOSE SOLUTION
- Support Centre

DESIGN

- THE DESIGN SOLUTION
- Support Centre

SEARCH

Use the search bar located in the top right corner to search for key words.

BROWSE BY TOPIC

- Behavioral Assessments
- Business Strategy
- Company Culture
- Diversity & Inclusion
- Employee Engagement
- Hiring
- Leadership
- Organization Design
- People Management
- Talent Optimization
- Teamwork

- Conflict Resolution Guide
- Management Strategy Guide
- Reference Profiles Power Up
- Assessing Your Organisation
- Onboarding New Employees with PI
- THE INSPIRE SOLUTION

INSPIRE

- Preparing to do a Readback
- Insights into a Readback
- Interview Questions Guide
- Interviewing with PI
- Match scores
- Aligning the Job stakeholders
- Creating Jobs and Job Targets
- THE HIRE SOLUTION

HIRE

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ACCOUNT OWNER

VITAL STEPS FOR ACCOUNT OWNERS

IF YOU ARE THE OWNER OF YOUR ACCOUNT, COMPLETE THESE STEPS

1

SET UP A FOLDER STRUCTURE

Your account comes with a root folder (company name) and folders for Candidates, Employees and Positions. You can add new folders to create a structure that matches your organisation. Click the video to see how.

2

ADD NEW USERS TO YOUR ACCOUNT

Grant access to those who will be working with PI. Read about the different user roles here, and create new users easily in the software. Read the document below to create new users properly.

3

SET UP AUTOMATIC ANONYMISATION

To stay GDPR compliant, set up a process to anonymise candidate data in your account. Include a consent message to refer to your privacy policy.

Contact us for help or read the document below.

4

ALLOW US TO VIEW YOUR DATA

The third-party access functionality lets your PI Consultant access data in your account which allows us to assist you better when you need to discuss profiles or come across issues. Granting us third-party access is GDPR compliant.

5

WHEN YOU NEED HELP

We can assist you faster than PI's customer service team 99% of the time, so reach out to your PI consultant if you need help or have issues in the software. Login to LEARN to find your PI consultant or reach out to info@humanostics.com

NEED HELP ?

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