

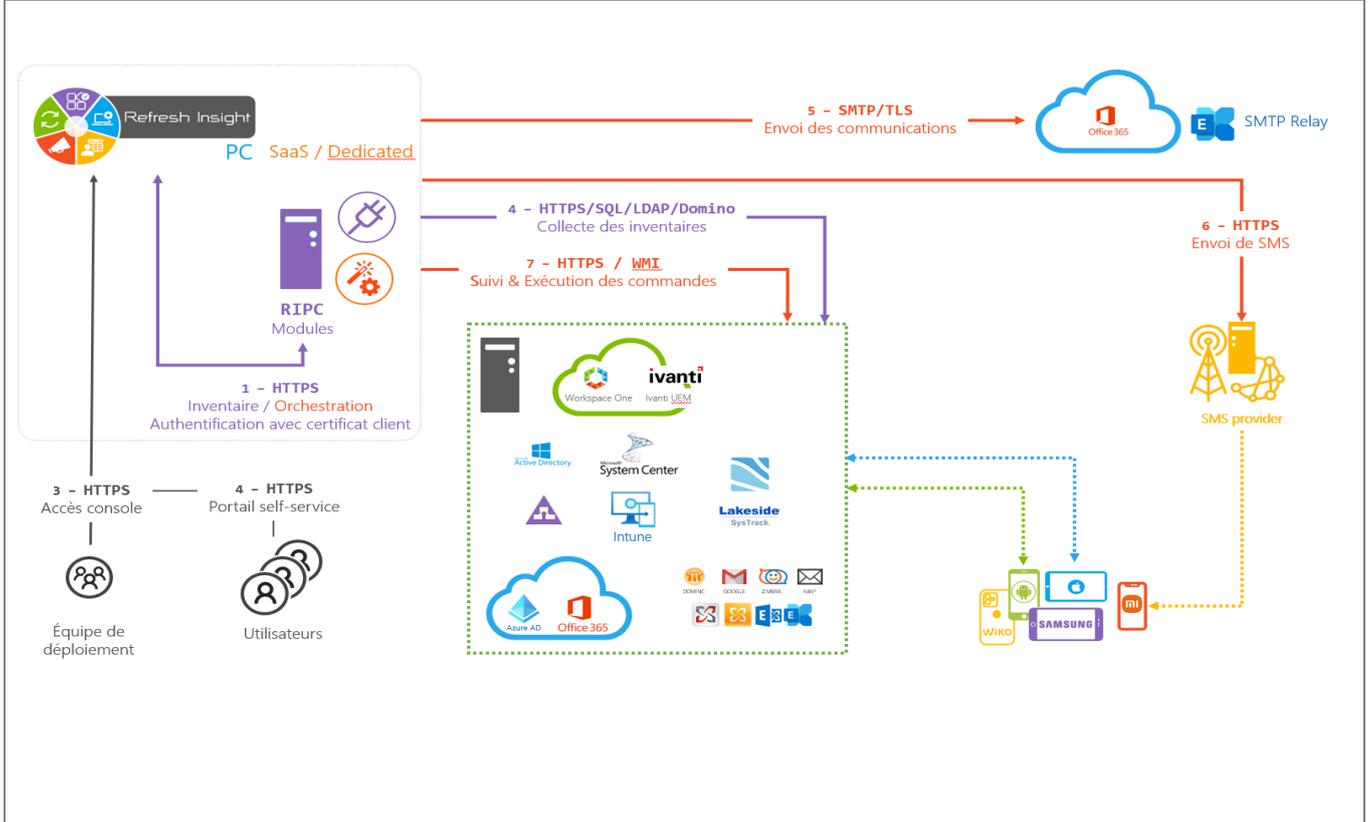
REFRESH INSIGHT PC

Deliver an end-to-end experience for PC lifecycle management and MDM migration
Refresh IT Solutions - Product Datasheet

Since Windows 10, the rhythm of Windows upgrades delivered by Microsoft accelerates. The challenge for companies is to make available the new feature releases of Windows to a larger number of users, a growing number of **PC or tablets**, while controlling the successive **waves of upgrades** to Windows and the **application life cycle**. In addition, companies are increasing their adoption of Microsoft Intune for device management and are looking for ways to rapidly migrate devices from their legacy MDM to Intune while providing the best end user experience.

It is to meet these challenges and leveraging our 16+ years' experience of large scale deployment projects as well as Microsoft recommended methodology that we created **Refresh Insight PC**. This software delivers a complete experience for deployment teams, end users and businesses to successfully transition to the Microsoft Modern Platform and roll out continuous waves of upgrades as well as hardware refresh. **Refresh Insight PC** includes a dynamically updated **knowledge base** providing an analysis of the eligibility of the assets (hardware and applications), a **self-service portal**, a **communication plan** to users, an execution of the migration leveraging the existing technical

Architecture



Features

Import collected data

Connectors

- Microsoft SCCM 2012R2 SP2 or higher, totally or filtered on collections (displayed collections can be filtered on the interface)
- No requirement
- Snow inventory software import (only in completion mode)
- Lakeside Systrack inventory by Web Services
- Excel file (.xlsx)
- Powershell
- Any SQL Server sources (need to configure the mapping between RIPC repository and sources)
- Intune
- Direct directory synchronization for users
- Active Directory (properties of user and computer objects) - only associated with SCCM retrieval
- Distinct RIPC repositories for devices, users and groups
- Lakeside Systrack inventory by Web Services
- **Workspace One**
- **Ivanti UEM**

Configuration

- Add custom properties to synchronize for the current customer (types supported: string, date, boolean, timespan, integer, float, list of objects)

Offline mode

- Import data collected from a PC/Server without connection to RIPC server

Customer

Personal settings

- Individual settings persisted in database

Customer management

- Create new customers
- Generate setup of Refresh Insight PC Synchronization Module (to synchronize SCCM, MAP, Systrack, Snow or Excel sources)

Rights management

- Service Account
- Grant operators to locations
- Grant privileges based on SSO groups (only available if not enable for Self service pages)
- Possibility to disable the operator count

Dashboard

Connection to the dashboard

- Integration with Azure Active Directory for authentication and roles management (only available if not enable for Self service pages)

Devices dashboard

- Rollout status (Distribution of devices in 5 phases : Assess, Decide, Batch & Schedule, Process, Drive)
- List of actions to take to move forward
- SAC and LTSC release mode (choose target version of Windows)

License Management

- Discovered devices
- Manage partners

Charts

- View operating system distribution per RIPC phases
- View top 20 of relevant products/versions installed
- View top 20 of products/versions to install (based on remediation rules)
- View similarities (group of devices with same applications to reinstall)

Devices overview

- View devices grouped by locations
- View relevant products/versions installed on devices
- View eligible processes for a device
- Short device inventory (model, RAM, Operating system, disks...)
- Export full device inventory in PDF format

Filter

- Filter by device name
- Filter by location

KDB Management

- Manage your own KDB

Products/Versions

- View list of products/versions
- Filter by Product/Version/Vendor/Type
- Duplicate a product/version
- View product/version details
- Create a new product/version
- Change Release date / End of support date
- Change compliancy of a product/version for each build of Windows 10
- Manage compliancy level (To Test, Adopted, Compatible, Not compliant)
- Set relevant product/version
- Delete a product/version
- Update product/version information with Excel file
- View signatures associated to a product/version
- Create dependencies between product/version
- Assign package to a product/version
- Import packages with Excel file
- Set the date for availability of a package

Signatures

- View unknown signatures for the current customer
- Ignore list of unknown signatures
- View list of signatures

- Filter by signatures
- Associate a signature to a product/version
- Add a new signature
- Delete a signature
- Import/Export signatures

Product owners

- Create/Modify/Delete products owner
- Communicate web portal URL to products owners
- Delegate rights to products owners to set tests status
- Delegate rights to products owners to set product compliancy for each build of Windows 10
- Delegate rights to products owners to set remediation rules
- Delegate rights to products owners to set packaging
- Securisation of AppOwner portal via Azure AD SSO (only available if not enable for Dashboard)
- Manage AppOwner users with Excel files (Import/Export)

Reporting

Management

- Users can subscribe to reports generated periodically

Assess

- Global Eligibility report (Excel)
- Eligibilities report (Excel)

Decide

- Packaging priority (Excel)
- Persona Eligibility Report (Excel)
- Remediations (Excel)
- History of actions made on softwares (Excel)

Batch & Schedule

- Quotas on slots (Excel)

Process

- Rollout forecast (Excel)
- Rollout status for last 24h (Excel)
- Local IT rollout forecast (Excel)
- Existing operations (Excel)

Drive

- Successful operations (Excel)

Assess

- Exclude devices from the scope
- Export devices in Excel file
- Delete devices
- View all devices synchronized in Refresh Insight PC
- Compute eligibility on selected workstation(s) in mass actions
- Columns in the panel are sortable by step and selection
- PowerShell Synchronization Module

Decide

Filters

- Create filters
- Filter on inventory data
- Filter on installed products/versions
- Filter on products/versions to remediate

Persona

- Create persona to identify population based on filters, or on Active Directory groups
- Add mandatory applications for personas
- Allow self-service applications for personas

Process

- Duplicate a process template (based on Windows Upgrade or Replacement templates)
- Associate communication plans and processes
- Associate surveys and processes
- Associate existing SCCM OSD tasks sequence or PowerShell script
- Set the list of personas granted to use a process
- Create eligibility filters
- Change the timeline of the communication workflow
- Add/Remove certain kind of scenario in a process thanks to the timeline
- Create a template process thanks to an existing one

Communication plan

- Duplicate communication plan

Remediation

Remediation of products/versions

- Define a remediation rule for a product (or product/version) and locations
- Remove a remediation rule
- Ignore product/versions massively
- Assign package to a product/version
- View the list of packages available in Refresh Insight PC
- Filter on application compliancy (compliant, upgrade needed, not compliant, unknown)
- Filter on packaging status (No package, not ready, ready)
- Filter on remediation rule (product, version, location, target)
- Export remediations (Remediation report in Excel format)

Communication

Massive communication

- Send emails to users (adoption communication, connection to self-service...)
- Send SMS to users (adoption communication, connection to self-service...)
- Communicate in user language
- Insertion of dynamic information in the communication
- Edit communication plan from Microsoft Word (Refresh Insight PC Word add-in)
- Track emails sending
- Send Meeting Requests with migration date on communication messages

Self-service

- Display communication according to the communication plan

Self-service

Self-service web portal

- Select the device to upgrade
- Select the process according to personas and eligibility of the device
- Schedule the upgrade according to the capacity planning
- Select list of self-service applications to install after the upgrade
- Reply to the questionnaire
- Validate to start the process
- Bypass useless pages (selection of devices or process if only one available)
- Possibility to refuse migration if allowed on process configuration
- Adding ability for users to choose their migration site
- Create the option for a user to change locations during rescheduling
- Customize Self-service pages with customer CSS and logo

Self-service update

- Reschedule the upgrade according to the capacity planning

Batch & Schedule

Capacity planning

- Specify daily quota per process / location
- Specify daily quota per slot
- Import/Export quota from Excel file
- See quotas in calendar

Order

- Send an email to the primary user of a device to schedule the migration according to the capacity planning
- Choose local IT for operation
- Schedule the migration date from Refresh Insight PC administration console

Process

Forecasting

- Planning of scheduled migrations for next weeks

Communication

- Send email at any moment of the process (T-Minus)
- Insert dynamic information in emails
- Send user acceptance at the end of the migration

Monitoring

- Monitoring processed in real time
- Drive and track status of SCCM OSD & packages deployment
- Drive and track status of PowerShell scripts execution
- Drive and track status of Intune scripts execution
- Drive and track status of Ivanti UEM scripts execution
- Drive and track status of Workspace One scripts execution
- Identify software installation as blocking to stop process if failed, based on Persona
- Comment process execution (single or mass update)
- Delete process (single or mass update)
- Reschedule/Stop a process (single or mass update)
- Manage OSD time-out by Process

Orchestration Module

- Execution of the module without interactive Windows session
- PowerShell connector to connect any compatible sources type (integration needed)
- Intune Orchestration
- Create option for admin to be able to (bulk) change locations while rescheduling

Survey

Administration

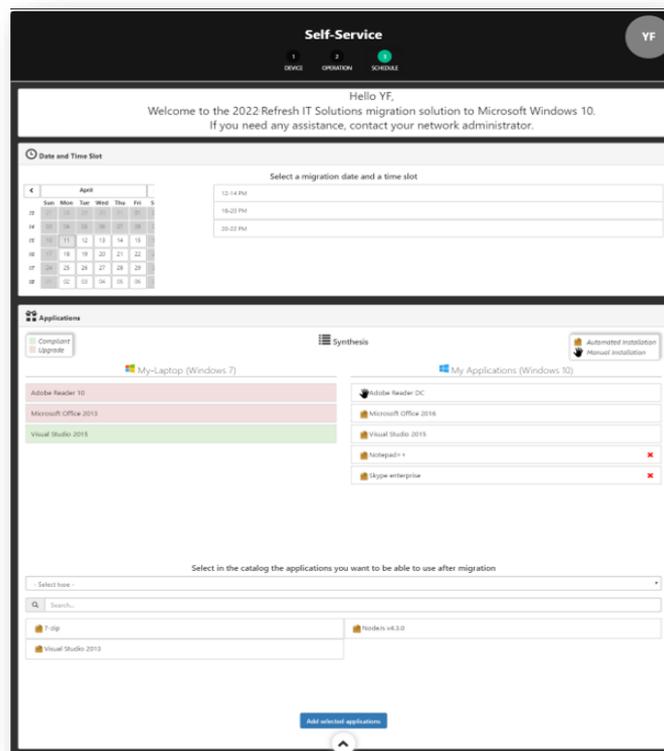
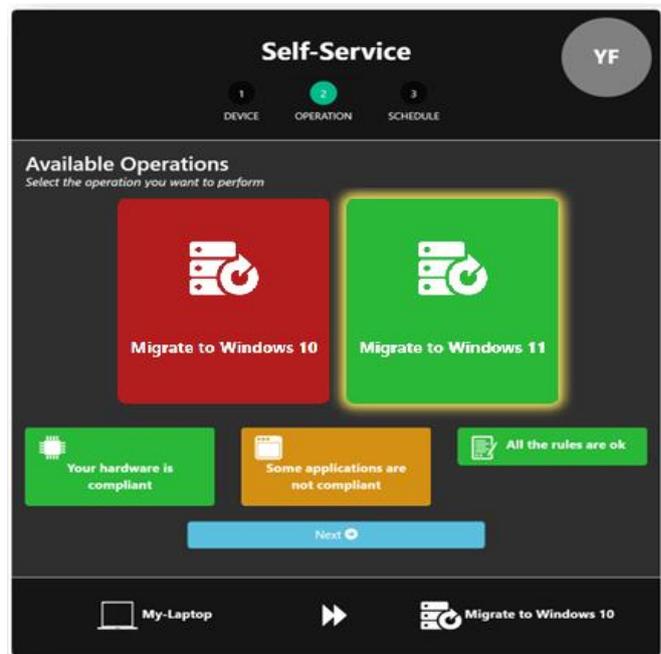
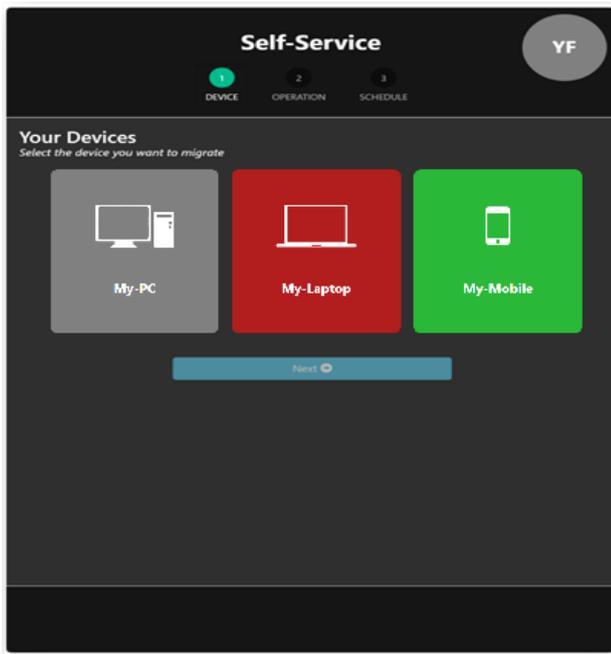
- Create/modify/remove surveys
- Add/modify/remove yes/no questions
- Set Mandatory / optional questions
- Add/modify/remove comments
- Export questionnaires in Excel format

Self-service

- Display questions associated to the selected process
- Send surveys answers and information in a user acceptance sheet

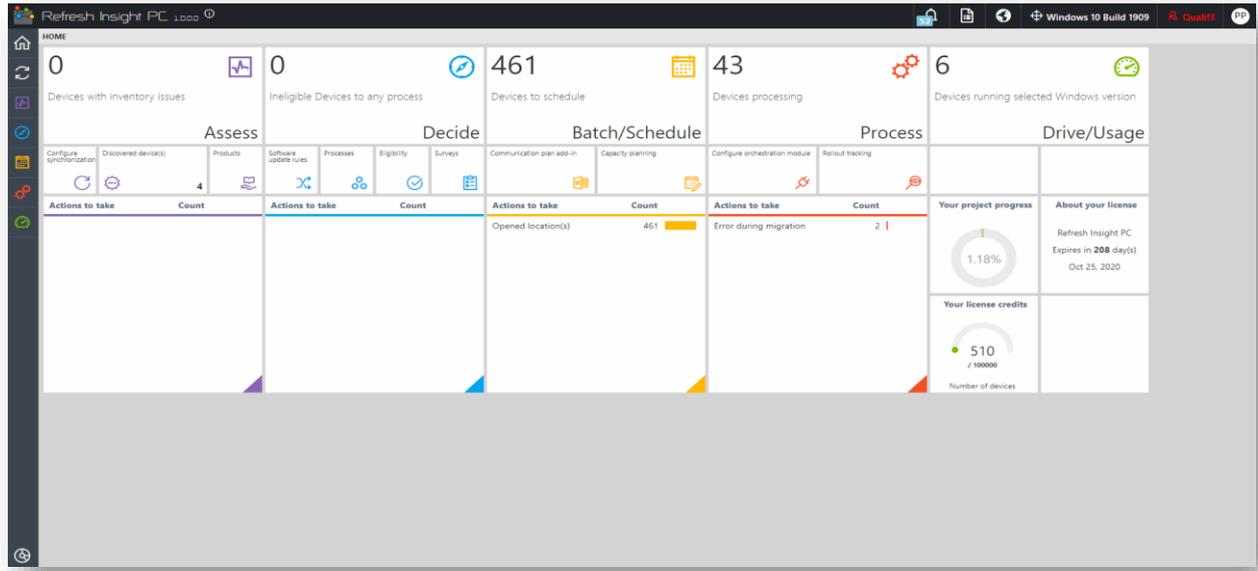
Self-service portal

- Select target device
- Select eligible process
- Schedule and validate

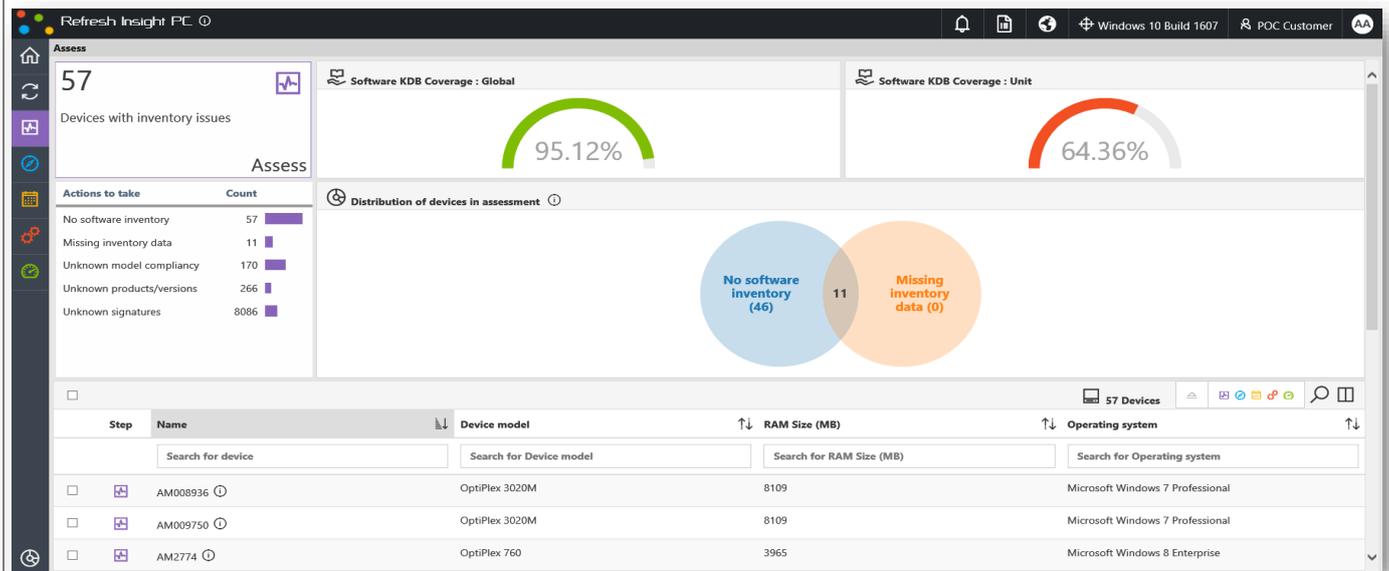


Administration console

Dashboard



Assess



Administration console

Decide

- View eligibility rules not met

Refresh Insight PC 1.000

36 Ineligible Devices to any process

Processes: 2 U1903

Personas: All

Decide

Actions to take: Products/Versions not compliant (3)

Personas Ineligibility Chart: No Device found

Eligibility rules not respected:

- Application eligibilities
- Hardware eligibilities: Hardware not compliant with W10 (Windows 10 Build 1903) (3)
- Business eligibilities: Process in progress (36)

Decide - Remediation

- Define remediation rules for a product or a specific product/version

Refresh Insight PC

Update remediation

Product: 1Password

Version: 1.0

Location: All locations

Target: 1Password 4.6

Change Cancel

Product	Version	Location	Target
360 Total Security	6.6	*	360 Total Security 8.8
360 Total Security	7.2	*	360 Total Security 8.8
4K Video Downloader	3.5	*	4K Video Downloader 4.1
4K Video Downloader	3.6	*	4K Video Downloader 4.1
7-Zip	*	*	7-Zip 16.04
7-Zip	4.43	*	7-Zip 16.04

Administration console

Decide - Eligibility rules

■ Create your own eligibility rules

Refresh Insight PC

Decide > Filters

Personas

- All
- Scanned by Windows Upgrade Analytics Agent
- Windows 7 Devices

Application eligibilities

- Applications not compliant
- Applications with unknown compliances
- Insufficient KDB coverage
- Packages are not ready

Business eligibilities

- No email address for primary user
- Process in progress for another target
- Ready to upgrade in UA

Hardware eligibilities

- Hardware not compliant with W10

Decide - Process creation

■ Design your process based on templates on the shelves

Refresh Insight PC

Decide > Processes

Number of processes : 2

Templates

- Windows Upgrade
- Windows Upgrade UA

Communication plan

- Communication plan for Windows Upgrade 0
- Communication plan for Windows Upgrade 1

Processes

- 533 Windows Upgrade
 - Personas
 - Windows 7 Devices
 - Add an existing persona
 - Application eligibilities
 - Insufficient KDB coverage
 - Packages are not ready
 - Add an existing application eligibility
 - Hardware eligibilities
 - Hardware not compliant with W10
- 0 Windows Upgrade UA

- Change the timeline of communication workflow

Time line designer

Move scenario on the timeline to change the T-minus of allowed steps then save your changes. 'O' is a date relative to the order date. 'D' is a date relative to the migration date.

N Migration scenario, used as a reference

Date Pivot

N The relative date cannot be changed

Date Fixed

N Date can be changed, click on the scenario

Date Enabled

N Drag left or right to change the relative date

Date Moving

Save Cancel

- Change e-mail content from Microsoft Word

Connect Save SaveAs Custom Fields

Connection Actions

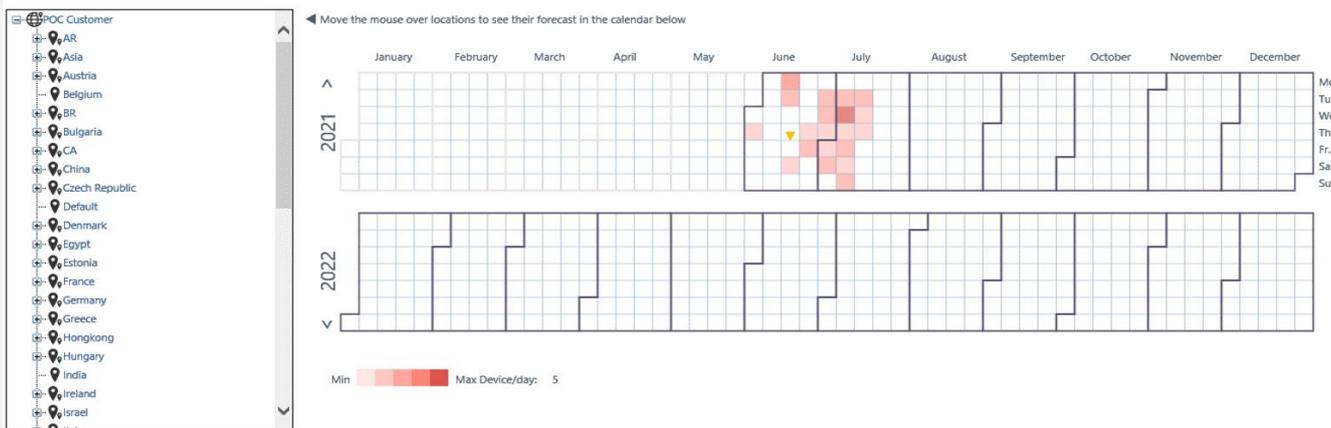
Communication plans

- Communication plan for Windows Upgrade 1
- EN
- E-mail
- Responsible user
- COM_SELFSERVICE_CONNECTION

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- Preview of scheduled migration for coming weeks

Forecast planning



- Configure the capacity planning according to locations constraints

Refresh Insight PC admin

Locations and Capacity planning management

Process: Windows Upgrade

Location

Opening dates: from 10/1/2021 to 12/31/2022

Language: EN

Timezone: (UTC) Dublin, Edinburgh, Lisbon, London

Quotas

September		October 2021				November	
Mon	Tue	Wed	Thu	Fri	Sat	Sun	
26 0/m	27 0/m	28 0/m	29 0/m	30 0/m	1 0/0	2 0/0	
3 0/m	4 0/m	5 0/m	6 0/m	7 0/m	8 0/0	9 0/0	
10 0/m	11 0/m	12 0/m	13 0/m	14 0/m	15 0/0	16 0/0	
17 0/m	18 0/m	19 0/m	20 0/m	21 0/m	22 0/0	23 0/0	
24 0/m	25 0/m	26 0/m	27 483/m	28 0/m	29 0/0	30 0/0	
31 0/m	1 0/m	2 0/m	3 0/m	4 0/m	5 0/0	6 0/0	

Quota

- Unspecified
- Unlimited number of operations
- Limited number of operations: 0
- Quota inherited by children locations

Dates

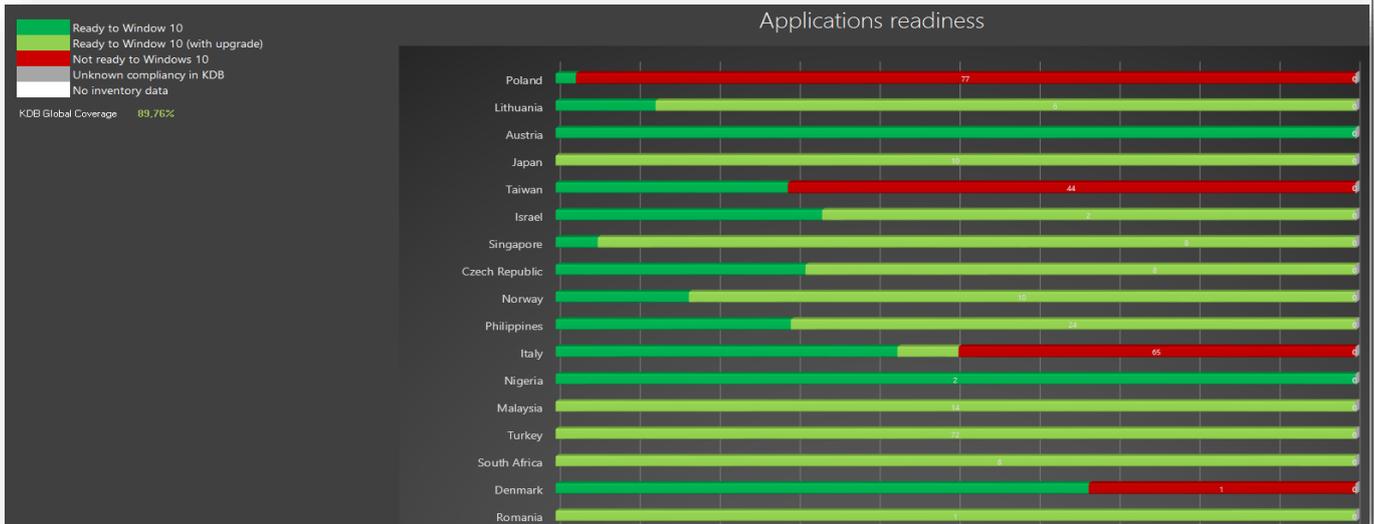
- One day of restriction
- Daily Limitation: Sun Mon Tue Wed Thu Fri Sat
begin on the 10/1/2021 until 12/31/2022
- Periodic limitation: begin on the [] each [] days until []
- Monthly limitation: 1 of the month until January 2021
 1 Sunday of the month until January 2021

Save

Report summary

- Application and hardware eligibility details for each device
- Synthesis per location

Device eligibility to Windows 10									
Device	KDB Coverage	Operating system	Location	RAM (GB)	Model			Unknown compliancy	Not compliant
BRU00A45	96.05%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✗	QuickTime 7.1 WinMerge 2.14	WMI Tools 150
BRU00A46	91.03%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✓		
BRU00A47	76.25%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✗	NI LabVIEW 2009 Simulation Senseless.TV Video Plugin 1.0	
BRU00A48	89.19%	Windows 7 Enterprise	DE/BERLIN01	8	HP ProBook 450 G2	✓	✗		
BRU0000E	90.00%	Windows 7 Enterprise	DE/BERLIN01	8	HP ProBook 450 G2	✓	✓		
BRU0020G	99.00%	Windows 7 Enterprise	DE/BERLIN01	8	HP ProBook 450 G2	✓	✓		
BRU00111	82.35%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✗		
BRU0010A	90.53%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✓		
BRU0099Y	94.87%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✓		
BRU00BBT	97.25%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6540	✓	✗		ABC Navigation 2.0
BRU00EE5	95.23%	Windows 7 Enterprise	DE/BERLIN01	8	HP ProBook 450 G2	✓	✗		ABC Navigation 2.0
BRU00YAV	94.20%	Windows 7 Enterprise	DE/BERLIN01	4	Latitude E6420	✓	✓		
BRU000DA	94.74%	Windows 7 Enterprise	DE/BERLIN01	4	Latitude E6420	✓	✓		
BRU000DB	96.16%	Windows 7 Enterprise	DE/BERLIN01	4	Latitude E6420	✓	✓		
BRU00AA1	90.91%	Windows 7 Enterprise	DE/BERLIN01	4	Latitude E6420	✓	✓		
BRU00AA2	93.02%	Windows 7 Enterprise	DE/BERLIN01	4	Latitude E6420	✓	✗		Scribble Papers 14.2
BRU00AA3	73.97%	Windows 7 Enterprise	DE/BERLIN01	8	Latitude E6450	✓	✗	Maxima 5.05.1 QuickTime 7.1 WinMerge 2.14	



Report summary

- Packaging priority
- Packaging coverage by location

Packaging priority



The ready date is based on availability date of the last package for that step. If no package has delivery date, the date is empty.

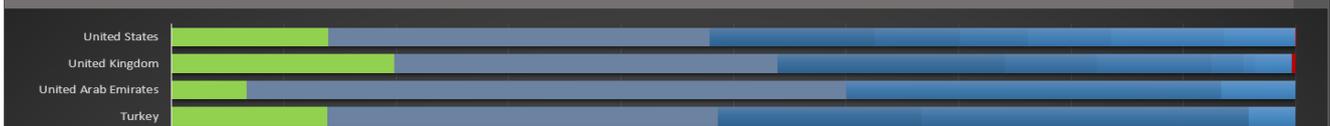
% of devices with 100% of packages needed to use the device in the target OS

Package	Step	Ready date	% of eligible devices
Ready devices	0		18,6%
Microsoft Office 2016	1		53,0%
Microsoft Silverlight 5.1	1		53,0%
Adobe Reader DC	1		53,0%
Google Chrome 51.0	1		53,0%
Java Runtime Environment 7.0 Update 85	2		67,1%
Java Runtime Environment 8.0 Update 51	2		67,1%
Adobe Shockwave Player 12.2	3		74,5%
WinZip 20.5	4		82,0%
Mozilla Firefox 43.0	5		88,9%
Pdf995 16.0	6		94,2%
PowerDVD 16.0	6		94,2%
VLC Media Player 2.2	7		99,9%
PdfEdit995	7		99,9%

Step details

Global coverage per step

■ Ready devices
 ■ Ready devices after packaging steps
 ■ Not ready devices



Report summary

- List of remediations for relevant product/version
- Number of products detected



Windows 10 remediations

Only products installed on devices in Assess or Decide step appear in this report.

1355 Relevant Products/Versions (434 distinct products)									
Product	Version	Licensed	Target Product	Target Version	Number of devices	Packaged	Packaging State		
.NET Memory Profiler	4.6	✔	.NET Memory Profiler	5.0	1				
1Password		✘	1Password	4.6	2				
1Password	1.0	✘	1Password	4.6	4				
1Password	4.6	✘	1Password	4.6	5				
2X Client		✔			1				
2X Client	10.1	✔			1				
2X Client	10.5	✔			28				
2X Client	11.0	✔			3				
2X Client	11.1	✔			28				
3Connect	3.0	✔			3				
4K Video Downloader	3.5	✘	4K Video Downloader	3.8	1				
7-Zip	15.05	✘	7-Zip	16.02	23				
7-Zip	15.06	✘	7-Zip	16.02	5				
7-Zip	4.43	✘	7-Zip	4.43	1				
7-Zip	4.44	✘	7-Zip	4.44	1				
7-Zip	4.65	✘	7-Zip	4.65	100				
7-Zip	9.17	✘	7-Zip	9.17	1				
7-Zip	9.19	✘	7-Zip	9.19	1				
7-Zip	9.20	✘	7-Zip	9.20	964				
7-Zip	9.21	✘	7-Zip	9.21	4				
7-Zip	9.22	✘	7-Zip	9.22	79				
7-Zip	9.35	✘	7-Zip	9.35	4				
7-Zip	9.3	✘	7-Zip	16.02	25				
7-Zip	9.38	✘	7-Zip	16.02	21				
7-Zip	9.2	✘	7-Zip	16.02	1				
A1 Sitemap Generator	6.0	✔	A1 Sitemap Generator	6.0	1				
ABBYY FineReader		✔	ABBYY FineReader	12.0	5				



Windows 10 remediations

Products	Total number of devices
.NET Memory Profiler	1
[mp3 - explorer]	43
1Password	11
2X Client	67
3Connect	3
4K Video Downloader	1
7-Zip	1230
A1 Sitemap Generator	1
ABBYY FineReader	12
Ableton Live	3
AbleWord	1
ACDSee	1
ACDSee Photo Manager	21
ACDSee Pro	6
Ace Video Converter	1
Acronis Backup Agent	4
Acronis True Image	1

Refresh Insight PC

Assess > KDB > Products Owners

Knowledge database (2021-04-25) Unknown signatures Packages Products Owners

6 Products Owners

Name	Email address	Number of products	Packages	Last communication date
Charlotte Makapo	Charlotte.Makapo@lab.com	0	<input type="checkbox"/>	
John Smith	John.Smith@lab.com	0	<input type="checkbox"/>	
Julie Thomas	Julie.Thomas@lab.com	0	<input type="checkbox"/>	
Karim Lizi	Karim.Lizi@lab.com	0	<input type="checkbox"/>	
Paul Yual	Paul.Yual@lab.com	1	<input checked="" type="checkbox"/>	
Riyan Scott	Riyan.Scott@lab.com	0	<input type="checkbox"/>	

Mode:

Product	Number of versions	Number of owners
CutePDF Writer	5	1

EN

Products Owners

Paul Yual

Select a target Windows version then select a product on which to define compliancies and remediations

Target: Windows 10 Build 1607

CutePDF Writer (5)

Validation state	Version	Compliance	Target
<input type="checkbox"/>	2.6	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	CutePDF Writer 3.1
<input checked="" type="checkbox"/>	2.7	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	CutePDF Writer 3.1
<input checked="" type="checkbox"/>	2.8	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	CutePDF Writer 3.1
<input type="checkbox"/>	2.9	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	CutePDF Writer 3.1
<input checked="" type="checkbox"/>	3.0	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	CutePDF Writer 3.0