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**

![Architecture Diagram](image-url)

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**Refresh Insight PC**

Deliver an end-to-end experience for PC lifecycle management and MDM migration

Refresh IT Solutions - Product Datasheet

Refresh Insight PC v4.1 | September 2022 | Copyright Refresh IT Solutions ©2022
# New features in Refresh Insight PC v4.1

## 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
- Workspace One
- Lakeside Systrack inventory by Web Services
- Ivanti UEM
- 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

### 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

## Features

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

### 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
- 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
### 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**

**Decide**

- View eligibility rules not met

**Decide - Remediation**

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

Decide - Eligibility rules

- Create your own eligibility rules

- Design your process based on templates on the shelves
Decide - 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.

Decide - Add-in for Word to change communication plan content

Change e-mail content from Microsoft Word
Schedule - Capacity planning

- Preview of scheduled migration for coming weeks

**Forecast planning**

Move the mouse over locations to see their forecast in the calendar below.

![Forecast planning diagram]

Schedule - Capacity planning

- Configure the capacity planning according to locations constraints

**Locations and Capacity planning management**

**Location**

- Opening dates: from 1/1/2021 to 31/10/2021
- Language: EN
- Timezone: Dublin, Edinburgh, Lisbon, London

**Quotas**

- Dates: One day of restriction, Daily Limitation, Periodic Limitation, Monthly Limitation
- Quota: Unspecified, Unlimited number of operations, Limited number of operations, Quota inherited by children locations

![Capacity planning management interface]
Report summary

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

### Device eligibility to Windows 10

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Operating system</th>
<th>Location</th>
<th>MAP (GB)</th>
<th>Model</th>
<th>Unknown compatability</th>
<th>Not compliant</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFL901</td>
<td>98.0%</td>
<td>Windows 10</td>
<td>DESER</td>
<td>59</td>
<td>Laptops990</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>SFL901</td>
<td>98.0%</td>
<td>Windows 10</td>
<td>DESER</td>
<td>59</td>
<td>Laptops990</td>
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<td>59</td>
<td>Laptops990</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### Applications readiness

- Ready to Windows 10
- Not ready to Windows 10
- Unknown compatibility to KB
- No inventory data

Countries: Belgium, Lithuania, Austria, Japan, Taiwan, India, Israel, Singapore, Czech Republic, Norway, Philippines, Italy, Nigeria, Malaysia, Turkey, South Africa, Denmark, Romania.
### 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.

<table>
<thead>
<tr>
<th>Package</th>
<th>Step</th>
<th>Ready date</th>
<th>% of eligible devices</th>
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<tbody>
<tr>
<td>Microsoft Office 2016</td>
<td>0</td>
<td></td>
<td>18.6%</td>
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<tr>
<td>Microsoft Silverlight 5.1</td>
<td>1</td>
<td></td>
<td>53.0%</td>
</tr>
<tr>
<td>Adobe Reader DC</td>
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<td></td>
<td>53.0%</td>
</tr>
<tr>
<td>Google Chrome 51.0</td>
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<td></td>
<td>53.0%</td>
</tr>
<tr>
<td>Java Runtime Environment 7.0 Update 85</td>
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<td></td>
<td>67.1%</td>
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<tr>
<td>Java Runtime Environment 8.0 Update 51</td>
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<td></td>
<td>67.1%</td>
</tr>
<tr>
<td>Adobe Shockwave Player 12.2</td>
<td>3</td>
<td></td>
<td>74.5%</td>
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<tr>
<td>WinZip 20.5</td>
<td>4</td>
<td></td>
<td>82.0%</td>
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<tr>
<td>Mozilla Firefox 43.0</td>
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<td></td>
<td>88.9%</td>
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<tr>
<td>Pdf995 16.0</td>
<td>6</td>
<td></td>
<td>94.2%</td>
</tr>
<tr>
<td>PowerDVD 16.0</td>
<td>6</td>
<td></td>
<td>94.2%</td>
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<tr>
<td>VLC Media Player 2.2</td>
<td>7</td>
<td></td>
<td>99.9%</td>
</tr>
<tr>
<td>PdfEdit995</td>
<td>7</td>
<td></td>
<td>99.9%</td>
</tr>
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</table>

### Step details

Global coverage per step

- **Ready devices**
- **Ready devices after packaging steps**
- **Not ready devices**

#### Coverage by location:

- **United States**
- **United Kingdom**
- **United Arab Emirates**
- **Turkey**
**Reports**

**Remediation report**

**Report summary**

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

**Windows 10 Remediations**

<table>
<thead>
<tr>
<th>Product</th>
<th>Version</th>
<th>License</th>
<th>Target Product</th>
<th>Target Version</th>
<th>Number of devices</th>
<th>Package</th>
<th>Packaging Status</th>
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<td>NET Memory Profiler</td>
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<td>v6</td>
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<td>Password</td>
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</tbody>
</table>

**Windows 10 Remediations**

<table>
<thead>
<tr>
<th>Products</th>
<th>Total number of devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Memory Profiler</td>
<td>1</td>
</tr>
<tr>
<td>[mp3 - explorer]</td>
<td>43</td>
</tr>
<tr>
<td>Password</td>
<td>11</td>
</tr>
<tr>
<td>2K Client</td>
<td>67</td>
</tr>
<tr>
<td>SConnect</td>
<td>3</td>
</tr>
<tr>
<td>2K Video Downloader</td>
<td>1</td>
</tr>
<tr>
<td>A1 Stremap Generator</td>
<td>1</td>
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<tr>
<td>ABBYY FineReader</td>
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</tr>
<tr>
<td>Ableton Live</td>
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<td>ACDSee</td>
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<tr>
<td>ACDSee Pro</td>
<td>6</td>
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<tr>
<td>Ice Video Converter</td>
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</tr>
<tr>
<td>Acronis Backup Agent</td>
<td>4</td>
</tr>
<tr>
<td>Acronis True Image</td>
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</table>
Products Owners web portal

Products Owners

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

Target: Windows 10 Build 1607

CutePDF Writer (5)

<table>
<thead>
<tr>
<th>Validation state</th>
<th>Version</th>
<th>Compliancy</th>
<th>Target</th>
</tr>
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<tbody>
<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
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