

# CBD DOC 2.9 Migration Guide

## Welcome

Welcome to CBDDoc version 2.9, our most substantial product release to date. To ensure a smooth transition to the new version, we are providing this migration guide to help you familiarize yourself with CBDDoc version 2.9.

This document is organized into the following sections:

- What is CBDDoc version 2.9?
- Changes to end user functionality and new features
- Installation requirements
- Frequently asked questions regarding CBDDoc version 2.9

## What is CBDDoc version 2.9?

CBD has empowered CBDDoc with the latest .NET technologies. Now you can have the best of both worlds; the most mature and robust document management solution available to agents today and the benefits of revolutionary .NET technology. Not only does the new .NET implementation dramatically increase performance, but also the use of Web services allows for the addition of features previously unavailable to CBDDoc users.

The first deliverables using this technology are the [CBDDoc Indexing Engine](#) and the [CBDDoc Cabinet Explorer](#); these are the primary new components of CBDDoc 2.9.

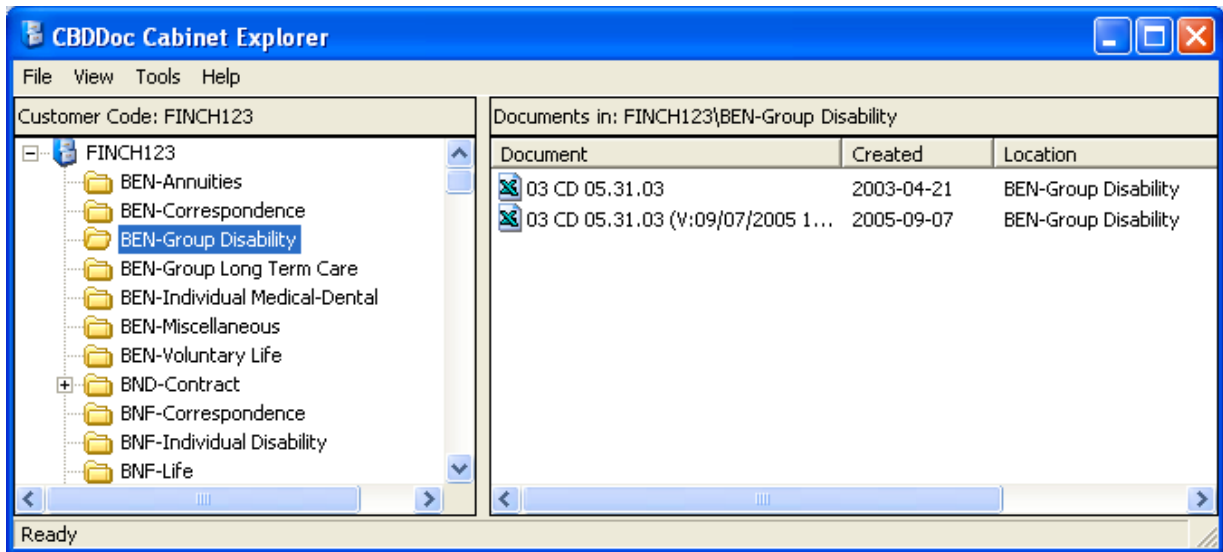
The **CBDDoc Indexing Engine** creates server side indexes, which dramatically reduce document retrieval times. With previous versions of CBDDoc, document retrieval times were tied directly to number of documents per client. Therefore, users servicing client codes with a large number of documents could experience lengthy document retrieval periods.

The **CBDDoc Cabinet Explorer** is the new .NET CBDDoc client. Since the CBDDoc Cabinet Explorer only interacts with the server side indexes, presentation of the cabinet contents is nearly instantaneous. This client application provides immediate access to view and search for documents.

## Changes to end user functionality and new features

Version 2.9 was architected to provide end users with the advantages of dramatically faster document retrieval times without the inconvenience of retraining. Since the **CBDDoc Cabinet Explorer** is visually identical to the CBDDoc Document Explorer most users will only notice substantial performance improvements as a result of the upgrade.

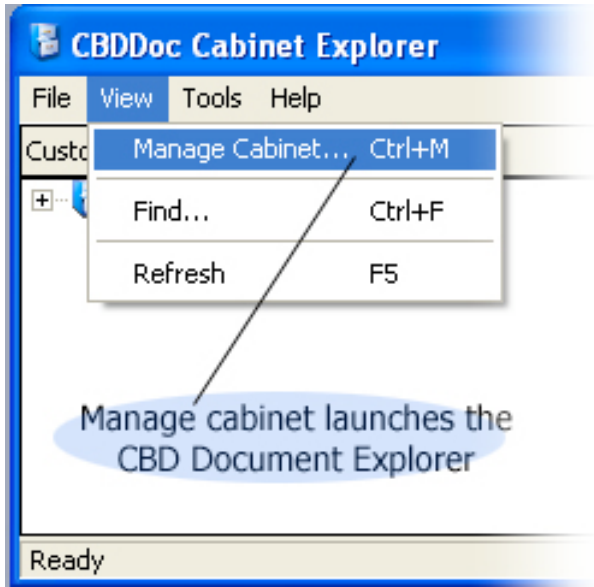
CBDDoc Document queries initiated from either the agency management system or the system tray control (“the little man”) now opens the CBDDoc Cabinet Explorer.



This new application provides the following functions to end-users:

- Open document(s)
- E-Mail document(s)
- Search documents
- Send to clipboard
  - All localized extensions that are installed on the system are available as clipboard options

The CBDDoc Cabinet Explorer does not provide the ability to modify documents; however these features are available by selecting the new “Manage Cabinet” function from either the View or right-click menus. This command launches the **CBDDoc Document Explorer**, which provides administrative functions such as rename, move, delete, etc.



All document security is still enforced through the CBDDoc and Domino.Doc APIs. The **CBDDoc Document Explorer** provides rename, delete, version, and move capabilities. Just as before, users are required to have sufficient rights to perform these operations.

The 2.9 version of the CBDDoc Document Explorer retains the same functionality as earlier versions of the product.

Existing CBDDoc version 2.8 MR1 profiling and saving functions are unaffected by the upgrade to version 2.9.

## Installation requirements for existing users

Installation is now greatly simplified; all client software can be deployed via login script or group policy. Upgrade tasks are performed in the following order.

- Step 1: Check prerequisites
  - Existing systems should be running CBDDoc version 2.8 MR1 (if not, there is a single-click upgrade available at: <http://www.cbdi.com/cbddoc/cbddoc280mre.asp>)
  - Client machines require .NET Framework version 1.1.
- Step 2: Schedule creation of server-side indexes
  - A CBD support member will initialize the server-side indexes used by version 2.9 client software. This is a one-time event, once initialized CBDDoc server indexes are automatically managed by the system. Depending on the size of your library(s) this could be an overnight process or an unattended weekend process.
  - Contact Lori Canada at CBD for migration scheduling
- Step 3: Upgrade the client software
  - The client software can be deployed via login script, MSI or manually. Below is a complete listing of files added or modified on the client pc's:

**C:\Program Files\CBDDoc**

Cbdadm.exe  
Cbdadm.exe.config  
Cbddocex.exe  
Cbdadm\_e.exe  
Interop.VBA.dll  
Interop.DominoDoc.dll

## Frequently asked questions regarding CBDDoc version 2.9



Q: What is the primary advantage of version 2.9?

A: Speed. Document retrieval times for all users are dramatically faster.

Q: Can I test version 2.9 without upgrading all my machines?

A: Yes. In the absence of a 2.9 client, the CBDDoc server behaves exactly as it would in a 2.8 environment. Once migration steps 1 and 2 are performed, you can install the 2.9 client on as many (or as few) machines as you'd like for testing.

Q: Our server is already slow and a few years old, do I need a new server to take advantage of this upgrade?

A: No, this upgrade will improve performance and actually decrease server resource utilization. Evaluate server performance after the upgrade.

Q: Do I need to upgrade my dedicated scanning machines?

A: Not required but allowed. The upgrade is only recommended for machines that frequently retrieve documents from a CBDDoc library.

Q: Are there any users that I shouldn't upgrade?

A: No, all users who retrieve documents from CBDDoc will receive benefits from faster document retrieval and server resource utilization will decrease with each client machine converted from 2.8 to 2.9.

Q: What are the retraining ramifications?

A: Minimal, only users who perform administrative tasks such as move, rename, and delete will notice the subtle differences between the new **CBDDoc Cabinet Explorer** and the **CBDDoc Document Explorer**. In order to perform these functions users will need to use the new "Manage Cabinet" function.

Q: Does the new CBDDoc Cabinet Explorer support my existing extensions?

A: Yes, the CBDDoc Cabinet Explorer supports the Document Clipboard, which in turn provides access to all existing extensions.