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Venio Client Installation SOP (Checklist)

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Venio Systems - On-Premises Installation Prerequisite Checklist

This document outlines the prerequisites and configuration steps for a standard on-premises installation of Venio Systems. Following this checklist will ensure a smooth and successful deployment.

1.0 System Architecture & Hardware Requirements

First, provision all required servers or virtual machines according to the minimum specifications below.

Server Role	CPU (Cores)	Memory (RAM)	Required Drive(s)
Console Server \ Search Server	8 - 16	16 - 32 GB	**C:** 250 GB (OS), **D:** 300GB (Venio Temp \ Index)
Image\ Export Server	8 - 16	16 - 32 GB	**C:** 250 GB (OS), **D:** 300 GB (Venio Temp)
Ingestion \ Import Server	8 - 16	16 - 32 GB	**C:** 250 GB (OS), **D:** 300 GB (Venio Temp)
OCR Server	8 - 16	16 GB - 32GB	**C:** 250 GB (OS), **D:** 300 GB (Venio Temp)
Web Server	8 - 16	16 - 32 GB	**C:** 250 GB (OS & IIS)
SQL Server	16 - 64	64 - 512 GB	**C:** 250 GB (OS), **D:** 500 GB (Logs), **E:** 500 GB (Data)
File Server	*Varies*	*Varies*	**C:** (OS), **Data Drive(s):** Sized for Project, Source, & Export data

2.0 Universal Prerequisites (All Venio Servers)

Complete these steps on **every** server that will be part of the Venio environment.

2.1 Service Account & Security

- [ ] Create an Active Directory user account to act as the Venio Service Account (e.g., `svc_venio`).
- [ ] Make the Venio Service Account a member of the local administrators group on all Venio servers.
- [ ] Make the Venio Service Account a member of the local remote desktop users group on all Venio servers.
- [ ] Grant the Venio Service Account "Log on as a service" rights on all Venio servers.

2.2 Operating System & Frameworks

- [ ] Install Microsoft Windows Server (2016, 2019, or newer).
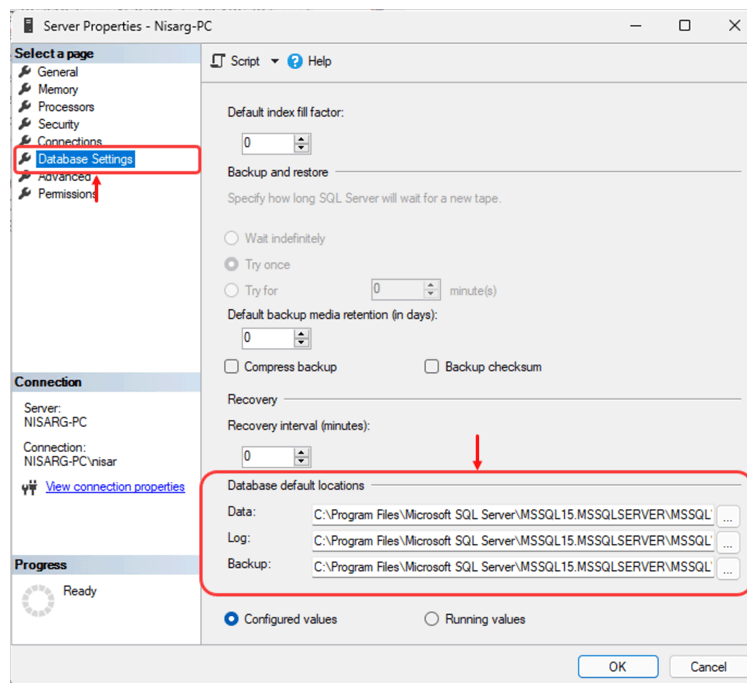
2.3 Antivirus & Firewall

- [ ] **Antivirus:** Disable AV or create exceptions for the following paths on all servers:
  - `C:\Venio\Temp` (or custom temp folder location)
  - `C:\Program Files\Venio`
  - `C:\Program Files (x86)\Venio`
  - All Project, Source, and Export network shares.
- [ ] **Firewall:** Disable the firewall between Venio servers or create rules to allow traffic as defined in the **Network Firewall Configuration** table (Section 7.0).

3.0 Component Installation & Configuration

Important: All installations and configurations must be performed while logged in as the Venio Service Account.

3.1 SQL Server

- [ ] Install SQL Server (Standard or Enterprise 2016, 2019, or 2022). During installation, you are responsible for setting default folders for database files (.mdf), log files (.ldf), and backups.
- [ ] Install SQL Server Management Studio (SSMS).
- [ ] Set Server Authentication to **SQL Server and Windows Authentication Mode**.
- [ ] Create a dedicated SQL user account with `SysAdmin` privileges for Venio.
- [ ] Set the Database default locations to the correct drives.

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NOTE: You must restart the SQL Server service to apply the changes otherwise the old values will still be used. Also, if you go back into SSMS after making the changes but did not restart SQL Server the old values will still show in the GUI. When the changes are made they are written to the registry and SQL Server will read the new values from the registry the next time it is started.

- [ ] Attach the VenioNSRL database (do not change the database name).
- [ ] Ensure the SQL Agent service is running and set to start automatically.
- [ ] Ensure the service account running the SQL Agent service has full access to the location you will be storing the SQL backups.
- [ ] Configure `xp_cmdshell` as per Venio documentation.
- [ ] Configure SQL memory and query settings:
  - [ ] Set Maximum Server Memory.
  - [ ] Set Cost Threshold for Parallelism between 25 and 50.
  - [ ] Set Max Degree of Parallelism (refer to best practices).
- [ ] Set Login Auditing to "Both failed and successful logins".
- [ ] Create SQL maintenance jobs:
  - [ ] Rebuild Index jobs (monthly).
  - [ ] Update Statistics jobs (weekly).
  - [ ] You are responsible for setting up and maintaining your own SQL database backup settings, including schedules (e.g., Full weekly, Differential daily, Logs quarter-hourly) and locations.

3.2 Processing Server(s)

- [ ] Install Microsoft Office 2016 or Microsoft 365 (64-bit required) under the Venio Service Account profile
- [ ] Open and configure Outlook, Word, Excel, and PowerPoint under the Venio Service Account profile.
- [ ] Install Lotus Notes Client (8.5.3 or 9.0.1) under the Venio Service Account profile.
- [ ] Open and configure the Lotus Notes client under the Venio Service Account profile.
- [ ] Install Adobe Reader DC (2019 or later)under the Venio Service Account profile
- [ ] Open Adobe Reader under the Venio Service Account profile to accept the license agreement and set it as the default PDF handler.
- [ ] (Optional) Install Mount Image Pro under the Venio Service Account profile

3.3 Web Server

- [ ] Install Internet Information Services (IIS).
- [ ] Install Microsoft .NET Framework 4.7.2.
- [ ] Install all versions of Microsoft Visual C++ Redistributable. https://learn.microsoft.com/en-us/cpp/windows/latest-supported-vc-redist
- [ ] From "Turn Windows features on or off," enable the following IIS features:
  - IIS 6 Management Compatibility
  - IIS Management Console
  - IIS Management Scripts and Tools
  - IIS Management Service
  - Under Application Development: .NET Extensibility 4.x (or newer)
- [ ] Ensure whichever account is running the 'Web Export Service' has full access to whichever folder is configured by the web, ondemandapi, and export service as the TEMP folder

- [ ] Ensure whichever account is running the 'Web Export Service' is the same account utilized as the identity for the application pool
- [ ] Ensure that the web server where the temp folder is created grants **full access** permissions to both the **user groups** and **IIS users**.

3.4 File Server

- [ ] Create network share (e.g., `\\fileserver\Venio` ,
- [ ] Grant the Venio Service Account **FULL_ACCESS (READ/WRITE/EXECUTE)** permissions to share.
- [ ] Gather SMTP server details (e.g., O365, G Suite, SendGrid) and credentials for an email account to be used for system notifications.

4.0 Acquiring Venio Software

- [ ] Log in to the **Venio Systems Client Portal** with your provided credentials.
- [ ] Download the following packages:
  - Venio Systems Installation Package
  - Venio System Prerequisites Software (Adobe Reader, Lotus Notes)
  - VenioNSRL Database
  - (Optional) Sample Data & User Guides

6.0 Network Firewall Configuration Summary

Server Role	Protocol	Port(s)	Purpose
All Servers	TCP	3389	Remote Desktop Protocol (RDP)
All Servers	ICMP	Echo Request	Ping (for connectivity testing)
SQL Server	TCP	1433	SQL Server Communication
Web Server	TCP	80 & 443	HTTP / HTTPS Web Access
Search Server	TCP	8090	Venio Search Service
Processing Server	TCP	10101-10105	Venio Service Communication
File Server	TCP	445	SMB File Sharing
File Server	TCP	139	NetBIOS Session Service
File Server	UDP	137, 138	NetBIOS Name/Datagram Service

Venio Environment Post-Deployment/Upgrade Configuration Guide

This guide provides step-by-step instructions for configuring key settings in a Venio environment after a new deployment or version upgrade. It is designed for both end users (e.g., clients managing their own setups) and Venio support staff. Configurations involve SQL updates to the database (typically VenioPCD), so ensure you have appropriate database access and backup the database before making changes.

Important Notes:

- Replace placeholders like venio.acme.com with your actual domain (e.g., the hosted URL provided by Venio or your organization).
- All SQL queries assume execution in the VenioPCD database. Use a tool like SQL Server Management Studio (SSMS) to run them.
- Test changes in a non-production environment first.

Configure Distributed Service

- [ ] Ensure ScanPST is enabled.

Configure Control Settings

- [ ] Update the tbl_pj_ControlSetting table to set the base URLs for web access, API, and help resources. These ensure proper connectivity to Venio services.

Example Values

Key	Value
WEB_BASE_URL	https://venio.acme.com/VenioWeb
VOD_API_URL	https://venio.acme.com/VenioOnDemandAPI/vod/services
VOD_HELP_URL	https://veniosystems.zendesk.com

SQL Queries to Update

Run these queries to insert or update the values. If the keys already exist, the UPDATE will modify them; otherwise, use INSERT.

```
-- Update or insert WEB_BASE_URL
IF EXISTS (SELECT 1 FROM tbl_pj_ControlSetting WHERE [key] = 'WEB_BASE_URL')
UPDATE tbl_pj_ControlSetting SET value = 'https://venio.acme.com/VenioWeb' WHERE [key] = 'WEB_BASE_URL';
```

```
ELSE
INSERT INTO tbl_pj_ControlSetting ([key], value) VALUES ('WEB_BASE_URL', 'https://venio.acme.com/VenioWel
-- Update or insert VOD_API_URL
IF EXISTS (SELECT 1 FROM tbl_pj_ControlSetting WHERE [key] = 'VOD_API_URL')
UPDATE tbl_pj_ControlSetting SET value = 'https://venio.acme.com/VenioOnDemandAPI/vod/services' WHERE [ke
ELSE
INSERT INTO tbl_pj_ControlSetting ([key], value) VALUES ('VOD_API_URL', 'https://venio.acme.com/VenioOnD
-- Update or insert VOD_HELP_URL
IF EXISTS (SELECT 1 FROM tbl_pj_ControlSetting WHERE [key] = 'VOD_HELP_URL')
UPDATE tbl_pj_ControlSetting SET value = 'https://veniosystems.zendesk.com' WHERE [key] = 'VOD_HELP_URL'
ELSE
INSERT INTO tbl_pj_ControlSetting ([key], value) VALUES ('VOD_HELP_URL', 'https://veniosystems.zendesk.cc
-- Verification Query:
SELECT [key], value FROM tbl_pj_ControlSetting WHERE [key] IN ('WEB_BASE_URL', 'VOD_API_URL', 'VOD_HELP_
```

Enable Default Features

Enable key features by setting their values to 1 in tbl_pj_ControlSetting. This activates functionalities like Excel viewer, clustering, and more.

SQL Queries to Enable Features

```
UPDATE tbl_pj_ControlSetting SET value = '1' WHERE [key] = 'SHOW_EXCEL_VIEWER_TAB';
UPDATE tbl_pj_ControlSetting SET value = '1' WHERE [key] = 'ENABLE_CLUSTERING';
UPDATE tbl_pj_ControlSetting SET value = '1' WHERE [key] = 'ENABLE_CONCEPT_SEARCH';
UPDATE tbl_pj_ControlSetting SET value = '1' WHERE [key] = 'ENABLE_PDF_IMAGING';
UPDATE tbl_pj_ControlSetting SET value = '1' WHERE [key] = 'ENABLE_CONNECTOR';
```

Verification Query:

```
SELECT [key], value FROM tbl_pj_ControlSetting
WHERE [key] IN ('SHOW_EXCEL_VIEWER_TAB', 'ENABLE_CLUSTERING', 'ENABLE_CONCEPT_SEARCH', 'ENABLE_PDF_IMAGII
```

Optional: Configure Root URL Redirect via IIS Manager.

If you prefer users to access the Venio web interface without appending /VenioWeb to the base URL (e.g., directly via https://venio.acme.com/), set up a URL rewrite rule in IIS to redirect the root path to /VenioWeb. This is an optional convenience step and requires administrative access to IIS.

Follow these steps in IIS Manager:

1. Open IIS Manager and select your site in the Connections pane.
2. In the Features View, double-click URL Rewrite. (If not visible, install the module.
https://www.iis.net/downloads/microsoft/url-rewrite
3. In the Actions pane, click Add Rule(s)....
4. Select Blank rule under Inbound rules and click OK.
5. Configure the rule with the following settings:
Name: Enter a descriptive name, e.g., "**Redirect Root to VenioWeb**".
Requested URL: Set to "**Matches the Pattern**".
Using: Select "**Regular Expressions**".
Pattern: **^$**
Ignore case: Checked (default).
Conditions: Leave empty (no additional conditions needed).
Server Variables: Leave empty.
Action:
Action Type: Select "**Redirect**".
Redirect URL: Enter **/VenioWeb** (relative path with leading slash).
Append query string: Checked.
Redirect type: Select "**Permanent (301)**" for production (SEO-friendly) or "Found (302)" for testing.
6. Click Apply in the Actions pane to save the rule.
7. Restart the site or IIS if necessary (via Actions > Restart).

After this configuration, accessing the root URL will automatically redirect to /VenioWeb. Ensure this does not conflict with other site rules or applications.

If issues arise, contact Venio support with details of your environment and changes made.

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