OTRS
Open Technology
Real Services

Documentation

OTRS Appliance Installation Guide

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OTRS Appliance Installation Guide

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Preface

The document at hand describes the installation and administration of the OTRS appliance. The OTRS appliance can be downloaded as an ISO image and provides a quick and easy way to set up an OTRS system, including all necessary components (operating system, database, webserver, etc.)

This guide describes the installation and administration of the OTRS appliance based on the virtualization software "Oracle VM VirtualBox". The appliance can also be used with virtualization software solutions provided by other vendors, or it can be installed on native hardware. To do so, the downloaded ISO file needs to be burned on a CD-ROM.

We welcome your feedback as a critical contribution to the best possible quality of the following chapters and of the product itself. Please tell us if you miss information, find it difficult to understand certain aspects or the way they are presented, have suggestions or any other comments. Any feedback submitted at *http://otrs.com* is highly appreciated.

OTRS AG

((enjoy))

Chapter 1. Downloading required software

1. OTRS Appliance

First you need to download the latest version of the OTRS appliance:

http://ftp.otrs.org/pub/otrs/

The required ISO file has the following name scheme:

otrs-3.3.0.beta4-appliance-1.0.0.beta1.iso

2. Oracle VM VirtualBox

This guide describes the installation based on the virtualization software "Oracle VM VirtualBox" which you need to install first.

If you did not do this until now, you can download the software here for free: https://www.virtualbox.org/

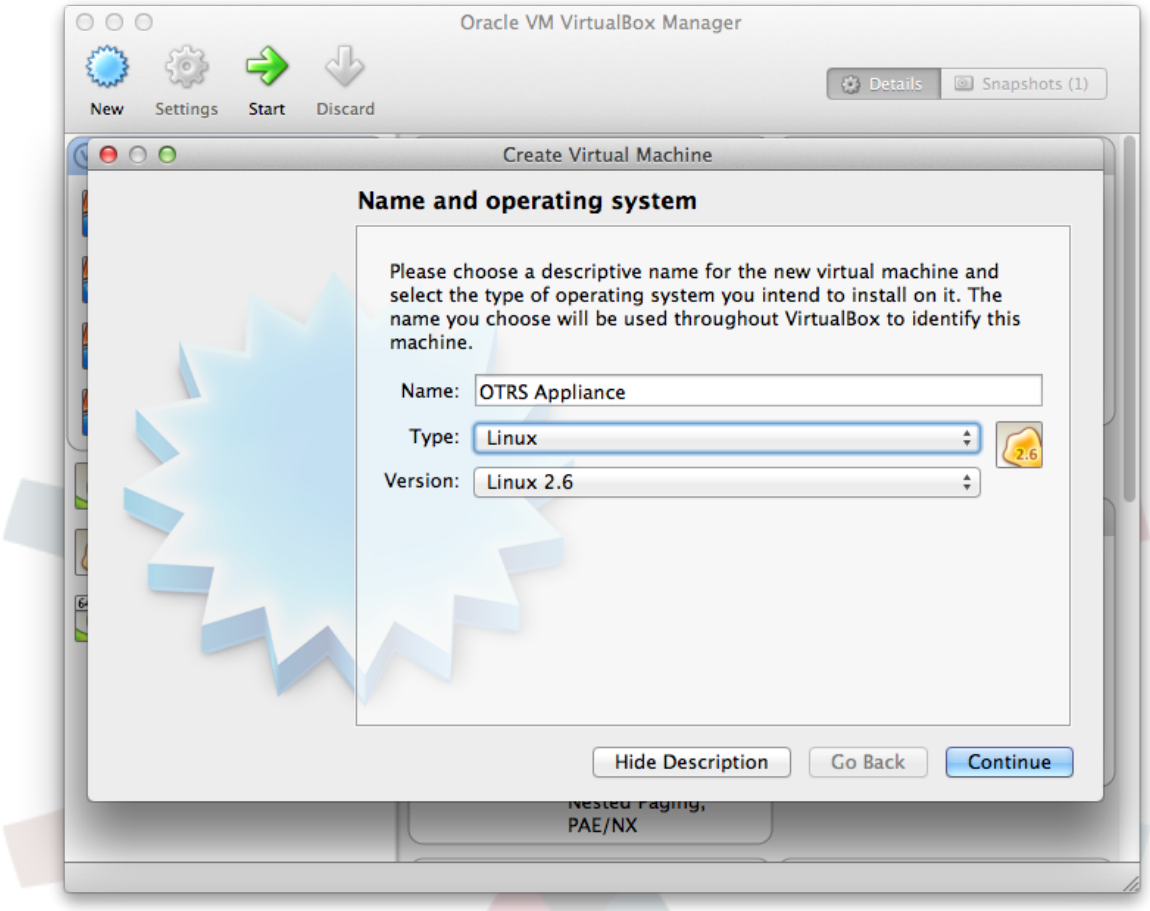
3. Installation on native hardware

You can install the OTRS appliance on native hardware too. You need to download the ISO file, burn it to a CD-ROM, and boot your system from CD.

Chapter 2. Creating a new virtual machine

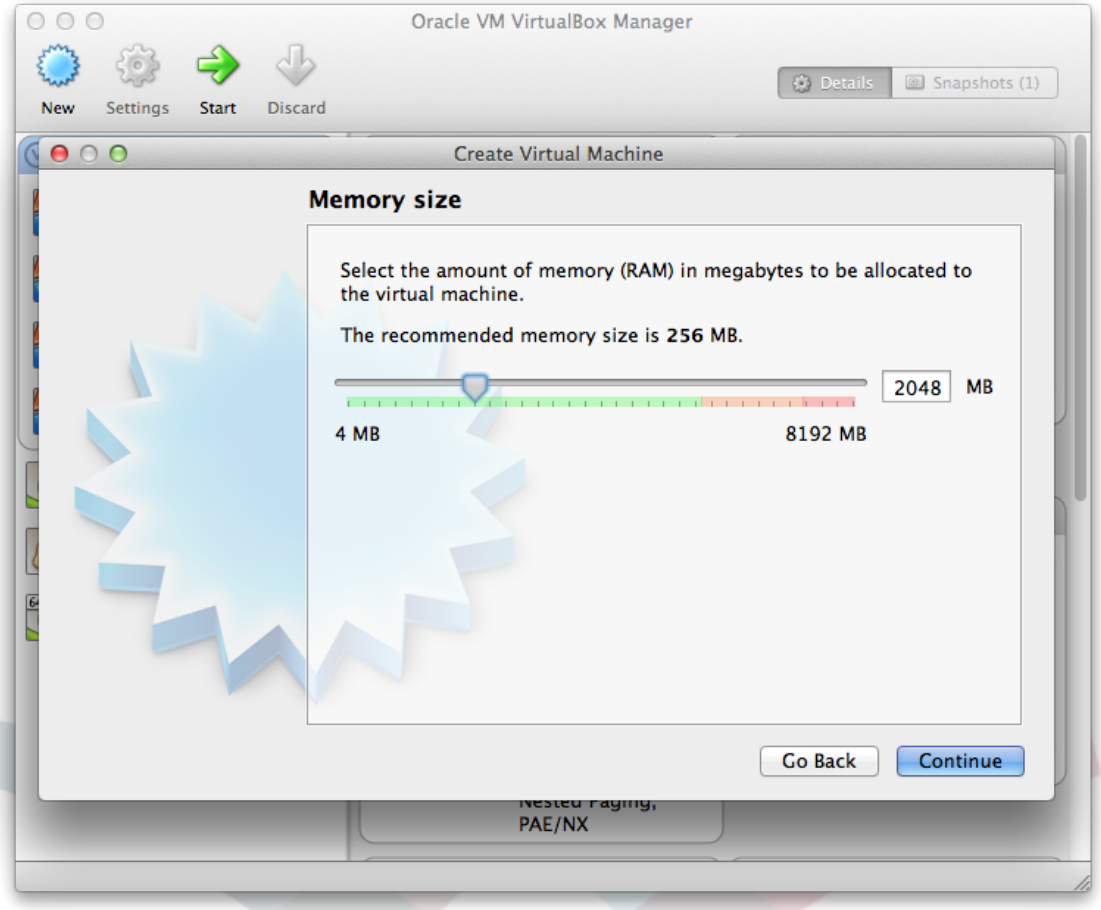
1. Name and operation system

Open your "Oracle VM VirtalBox" software and click on the "New" icon. Enter a name for the new machine, e.g. "OTRS Appliance" and select "Linux" as type and "Linux 2.6" as version. Then click on "Continue".



2. Memory size

Select the memory size for the virtual machine, recommended are at least 2048 MB.

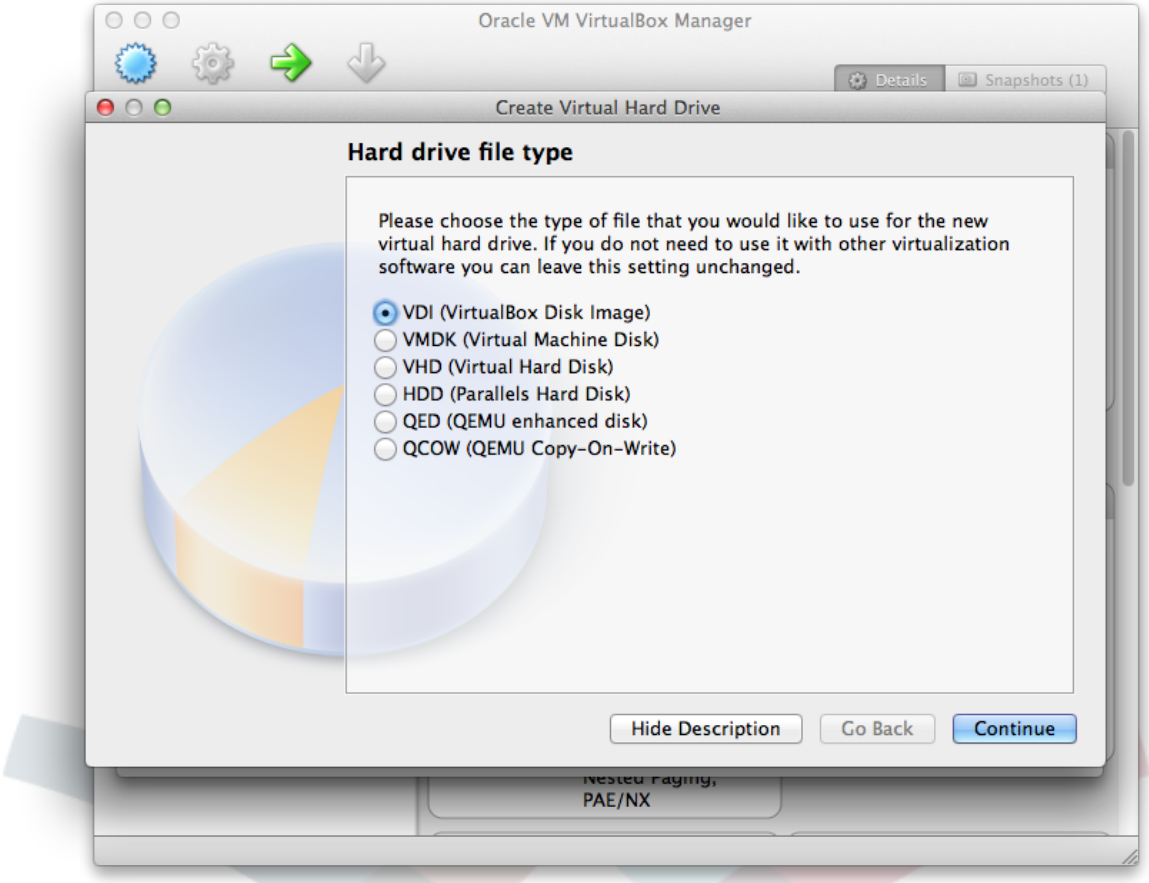


3. Hard drive

Select "Create a virtual hard drive now" and click on "Create".

4. Hard drive file type

Select the type of the new virtual hard drive as "VDI (VirtualBox Disk Image)" and click on "Continue".

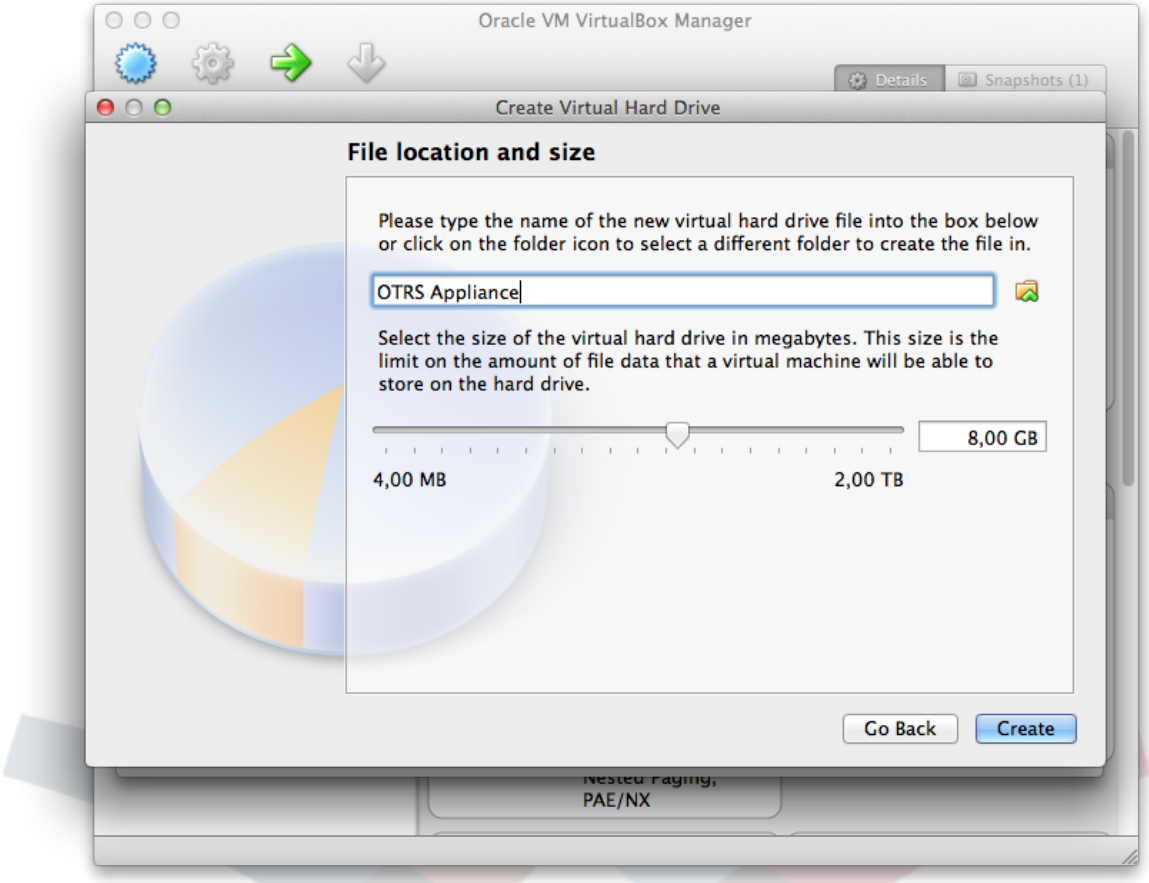


5. Storage on physical hard drive

Select "Dynamically allocated" for "Storage on physical hard drive" and click on "Continue".

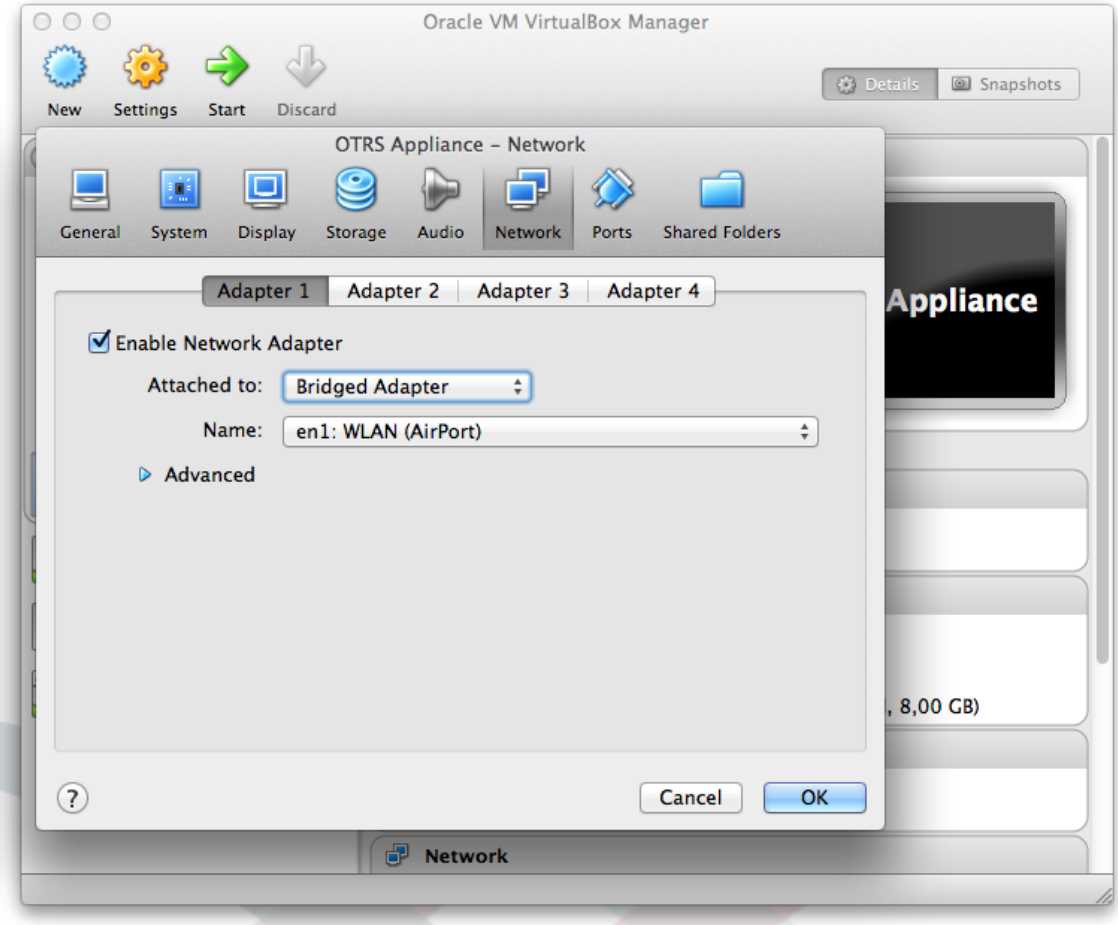
6. File location and size

Select a filename like "OTRS Appliance" and choose a size of at least 40 GB. Then click on "Create".



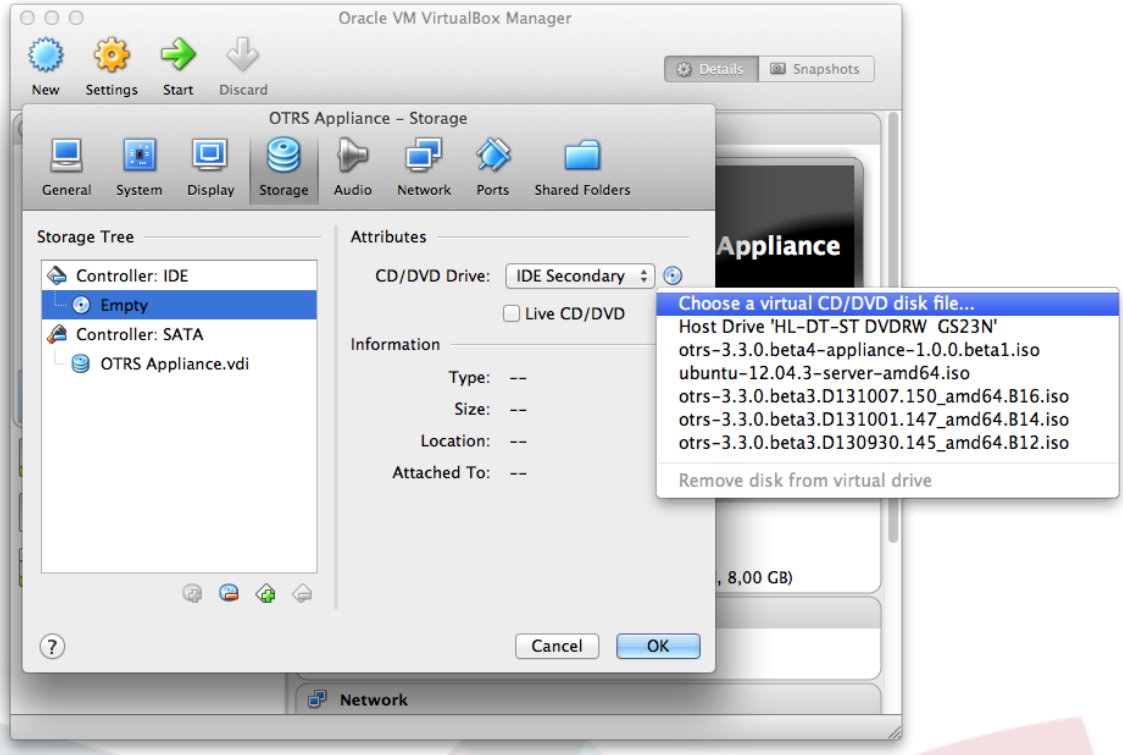
7. Network

The new virtual machine has been created now and can be found in the list of virtual machines in the left sidebar. Now click on the newly created machine, and then click on the "Settings" icon in the top menu bar. Then click on "Network" and then on "Adapter 1". Choose "Bridged Adapter" for "Attached to". This enables your OTRS system to be reached from the network for incoming connections.



8. Storage

Click on the "Storage" icon and on the CD symbol close to "Controller: IDE". Then click on the small CD symbol in the "Attributes" section, and the select "Choose a virtual CD/DVD disk file...". Select the previously downloaded OTRS appliance ISO file and click on "Ok". The setup of the new virtual machine is now completed.


Oracle VM VirtualBox Manager
New
Settings
Start
Discard
Details
Snapshots
OTRS Appliance - Storage
General
System
Display
Storage
Audio
Network
Ports
Shared Folders
Storage Tree
Controller: IDE
Empty
Controller: SATA
OTRS Appliance.vdi
Attributes
CD/DVD Drive:
IDE Secondary
Live CD/DVD
Information
Type: --
Size: --
Location: --
Attached To: --
Choose a virtual CD/DVD disk file...
Host Drive 'HL-DT-ST DVDRW GS23N'
otrs-3.3.0.beta4-appliance-1.0.0.beta1.iso
ubuntu-12.04.3-server-amd64.iso
otrs-3.3.0.beta3.D131007.150_amd64.B16.iso
otrs-3.3.0.beta3.D131001.147_amd64.B14.iso
otrs-3.3.0.beta3.D130930.145_amd64.B12.iso
Remove disk from virtual drive
Appliance
, 8,00 GB)
Cancel
OK
Network

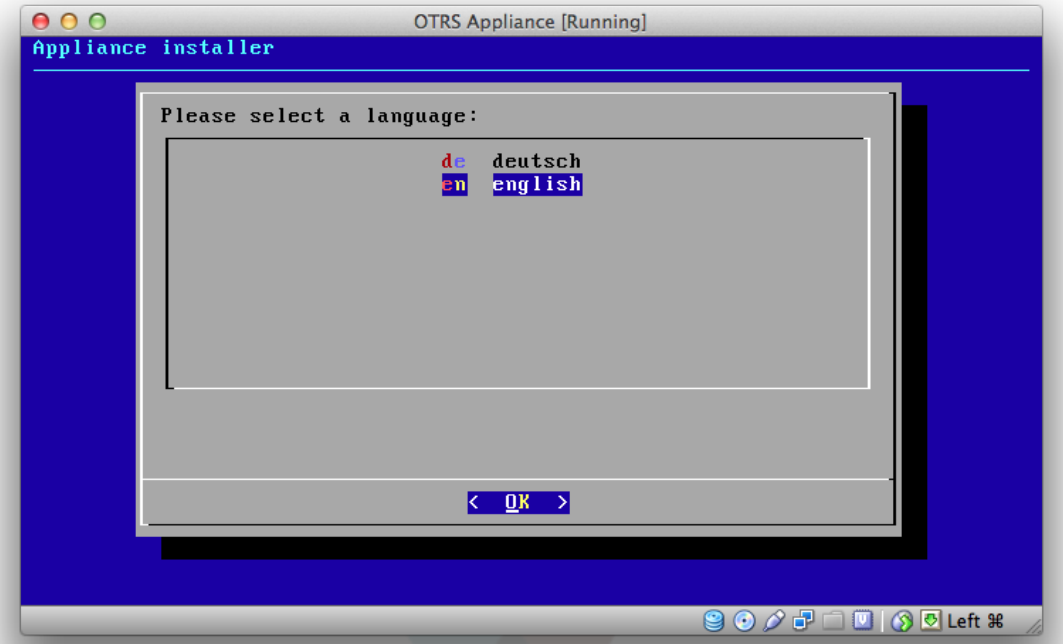
Chapter 3. Installation of the OTRS appliance software

1. Starting the virtual machine

Start the virtual machine by clicking on "Start". The machine will boot up and shows an info screen. After the few seconds the boot process will continue.

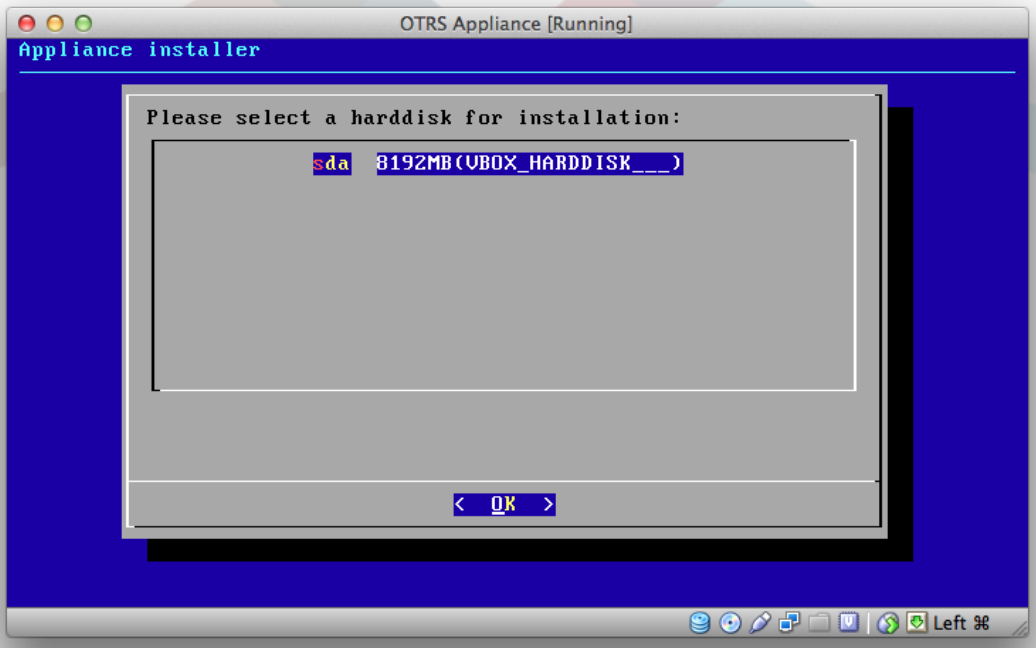
2. Language selection

Select a language. You can choose between English and German.



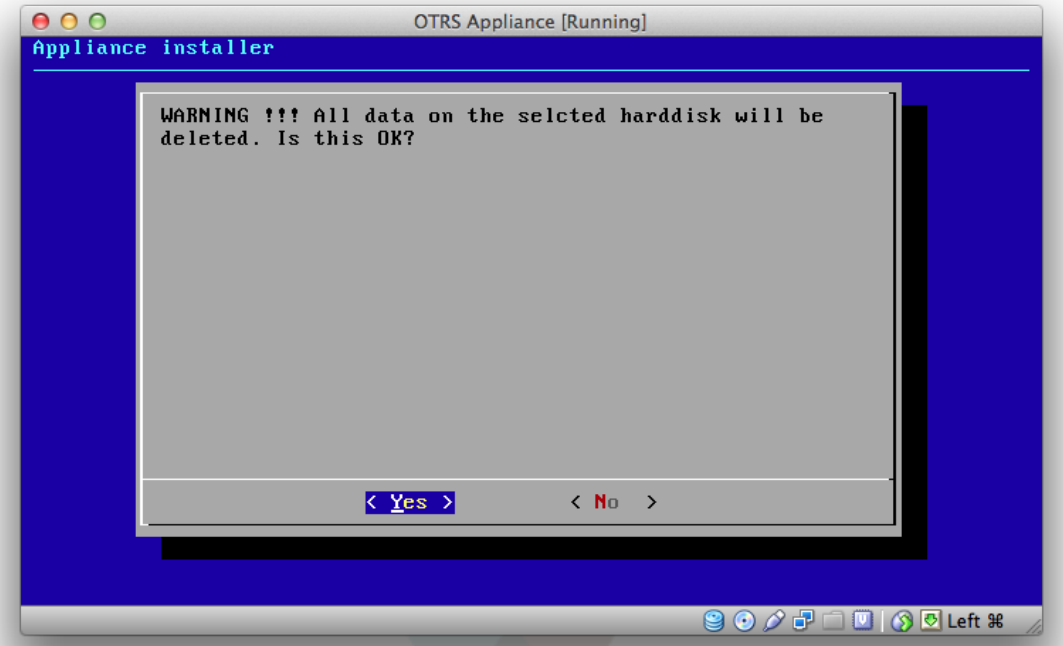
3. Harddisk selection

Select the suggested hard disk and confirm with the "Enter" key.



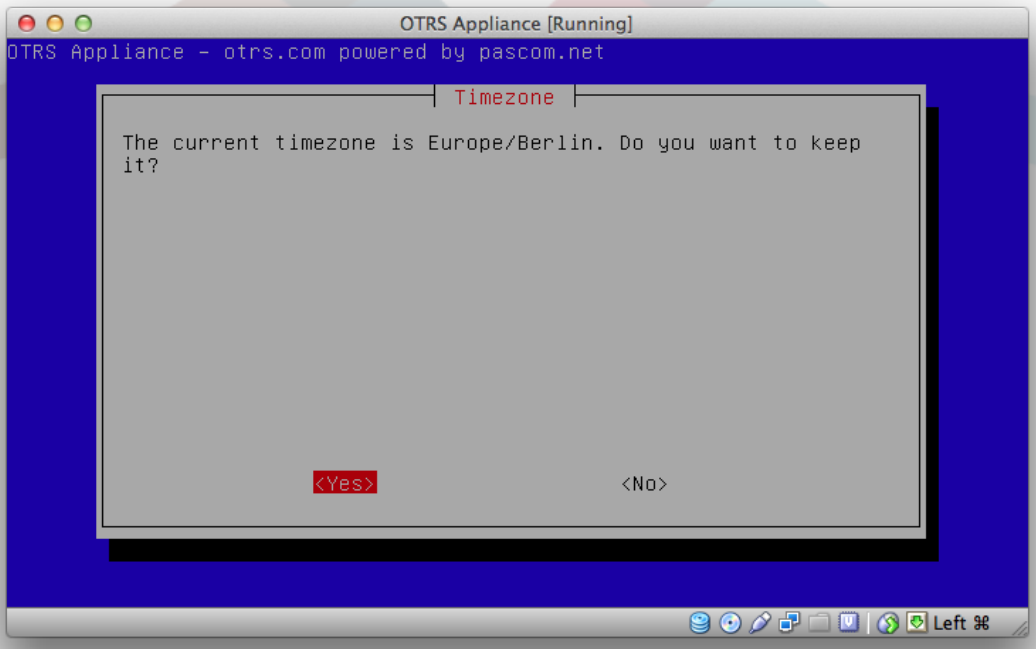
4. Harddisk deletion

The warning message refers to the virtual hard disk of the virtual machine. Select "Yes" and confirm with the "Enter" key.



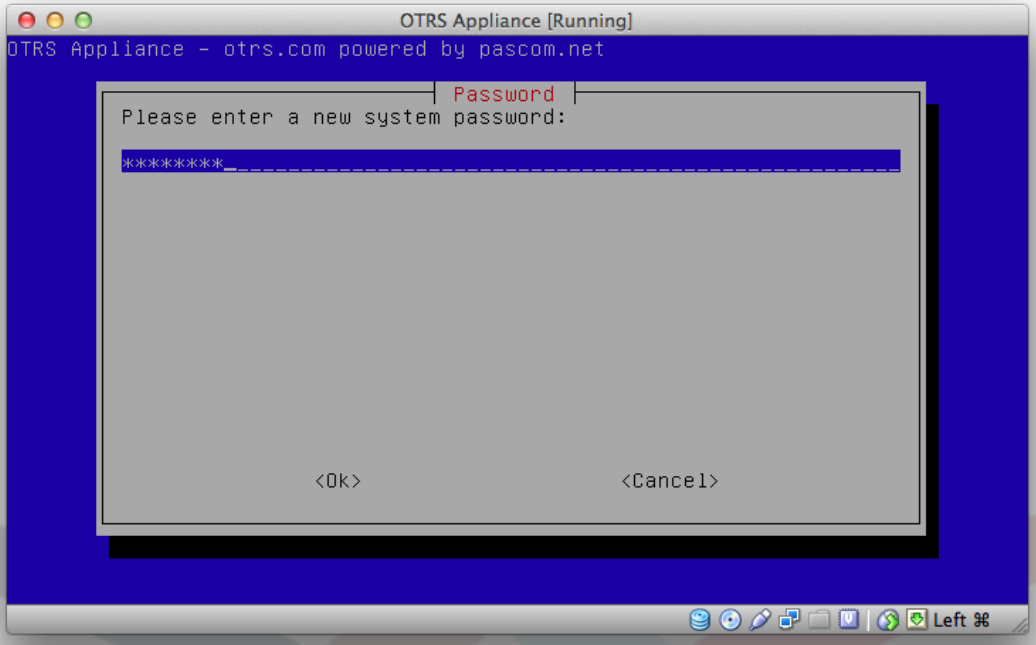
5. Timezone selection

Select the desired time zone and confirm with the "Enter" key.



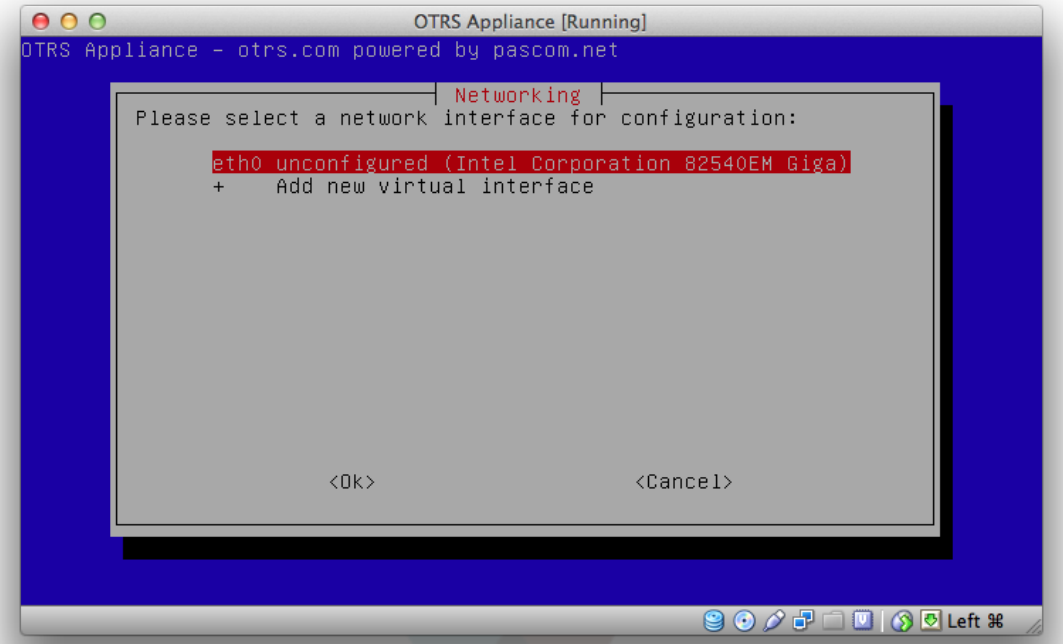
6. Password selection

Select a system password for your OTRS appliance. The password must contain at least 8 characters. After the password has been entered, it has to be confirmed again in a second step.



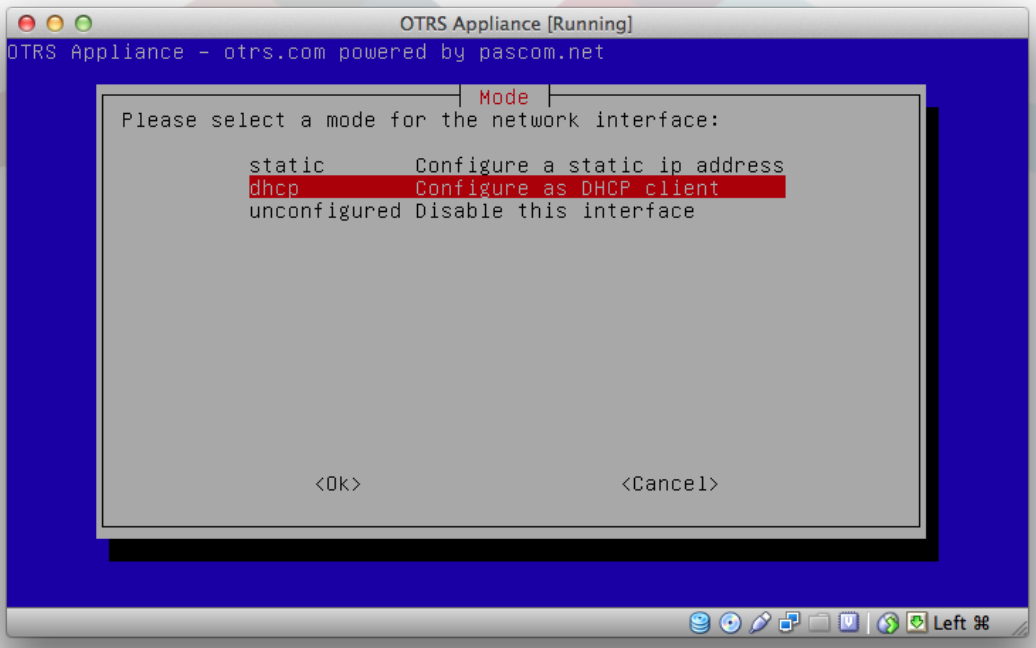
7. Network interface selection

Select the suggested network interface "eth0 unconfigured" and confirm with the "Enter" key.



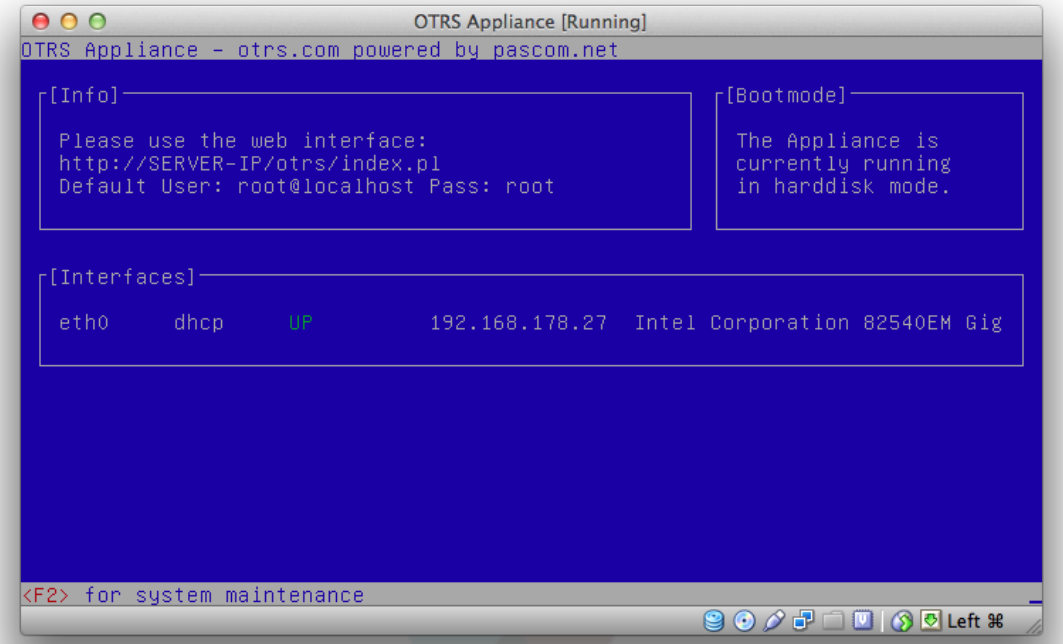
8. Network interface mode

Select a mode for the network interface, e.g. DHCP or configure a static IP address.



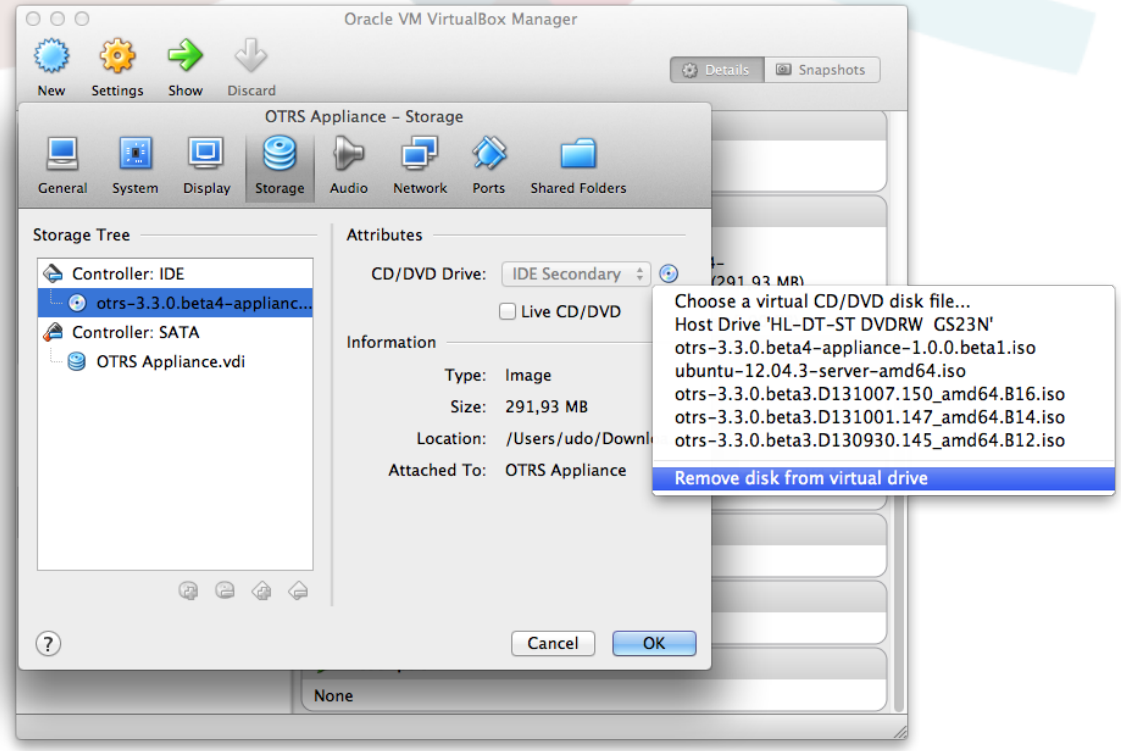
9. Installation completed

The installation is completed now and an information screen will be shown, displaying information about the IP address and how to log in to the system.



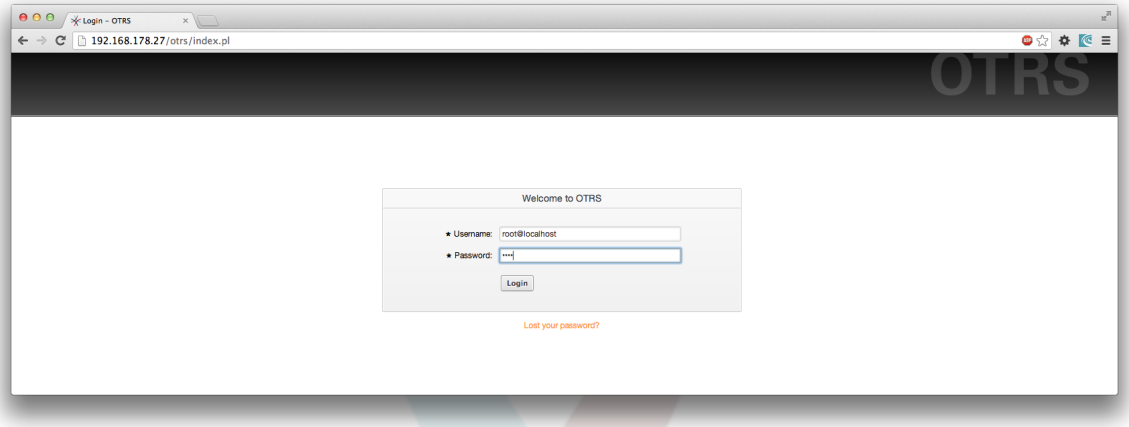
10. Remove CD-ROM

In the VirtualBox software, click on the "Settings" icon, then on the "Storage" icon, and after that on the small CD icon on the left sidebar, close to "Controller: IDE". Then click on the small CD icon on the right side, close to "Attributes", and select "Remove disk from virtual drive". This step is necessary so that the next time the virtual machine is booting, it will boot from the hard disk instead from the CD.



11. Log in

Now open a web browser and type in the IP address which was shown on the information screen after completing the installation, the IP address needs to be followed by /otrs/index.pl, e.g. http://192.168.178.23/otrs/index.pl. Use "root@localhost" as user name and "root" as password.

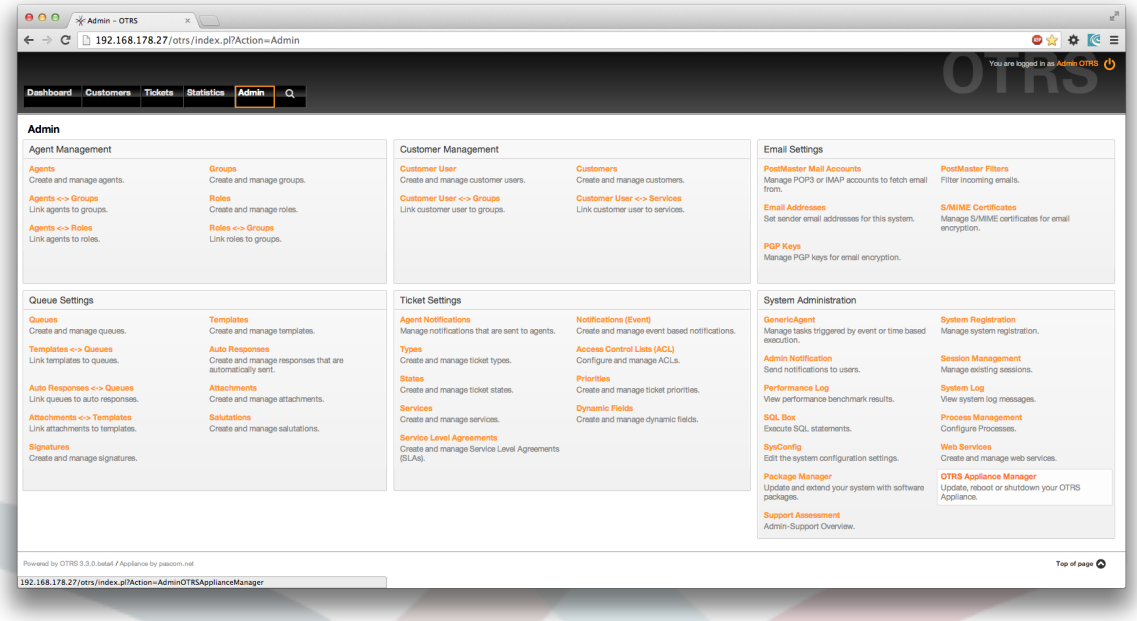


The installation is now completed, and you can work with your OTRS system now.

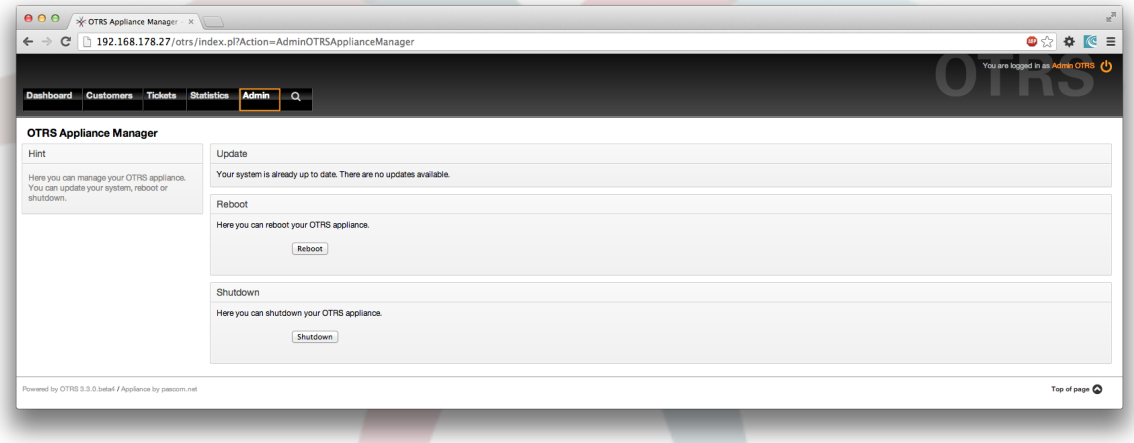
Chapter 4. OTRS Appliance Management

1. Admin area "OTRS Appliance Manager"

In order to update the OTRS appliance, or to reboot or shut down the system, there is an admin area "OTRS Appliance Manager".



In this area you will be notified about available updates for your system, and you can reboot or shut down your system.



2. Update

The OTRS Appliance Manager will show you if updates are available for your system. In this case an appropriate message will be shown, as well as an update button. After clicking the button, the system will be updated automatically.

3. Reboot

To reboot the system just click on the "Reboot" button. The system will not be available for a few minutes during the reboot. Please remove any CD from the CD drive of your system before!

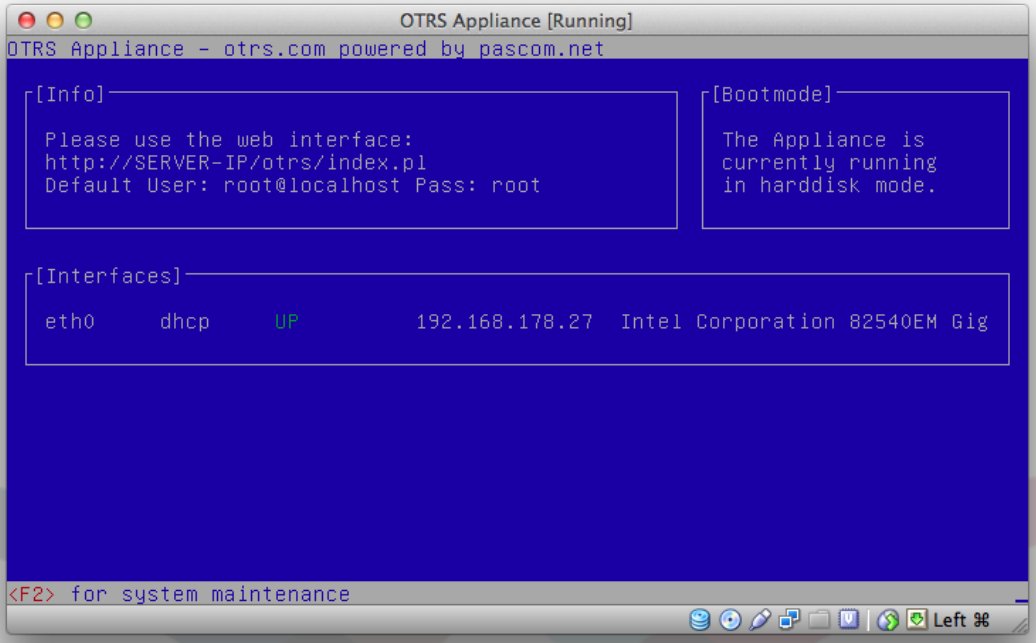
4. Shutdown

To shut down the system just click on the "Shutdown" button. Please remove any CD from the CD drive of your system before!

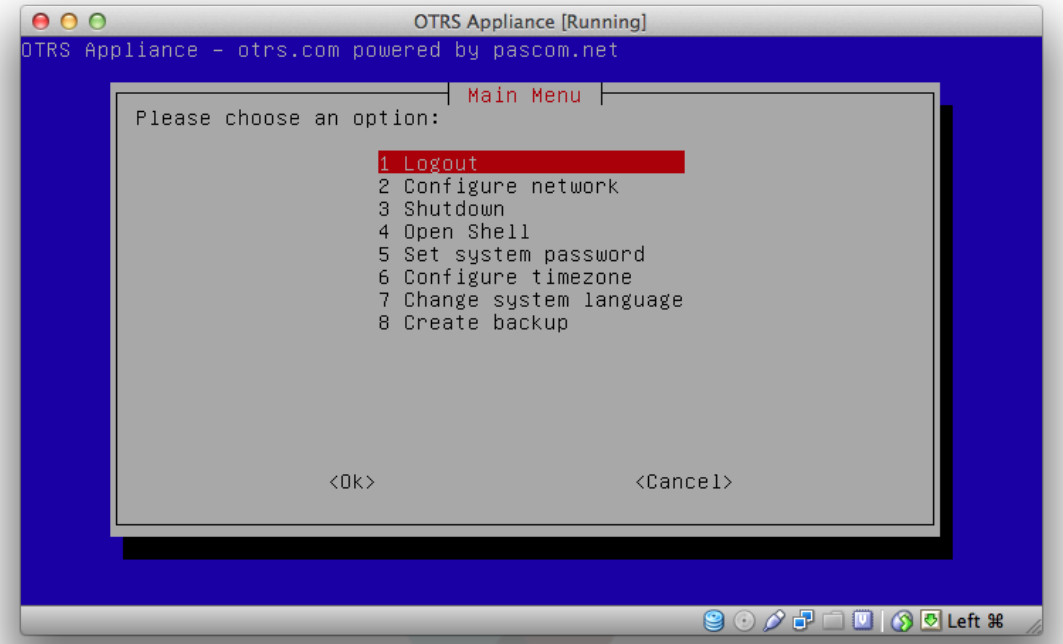
Chapter 5. System maintenance

1. Main menu

Open the system maintenance main menu by pressing the F2 key in the information screen. You need to enter your system password here.



In the main menu you have the following 8 possibilities: Logout, Configure network, Shutdown, Open Shell, Set system password, Configure time zone, Change system language, Create backup.



2. Logout

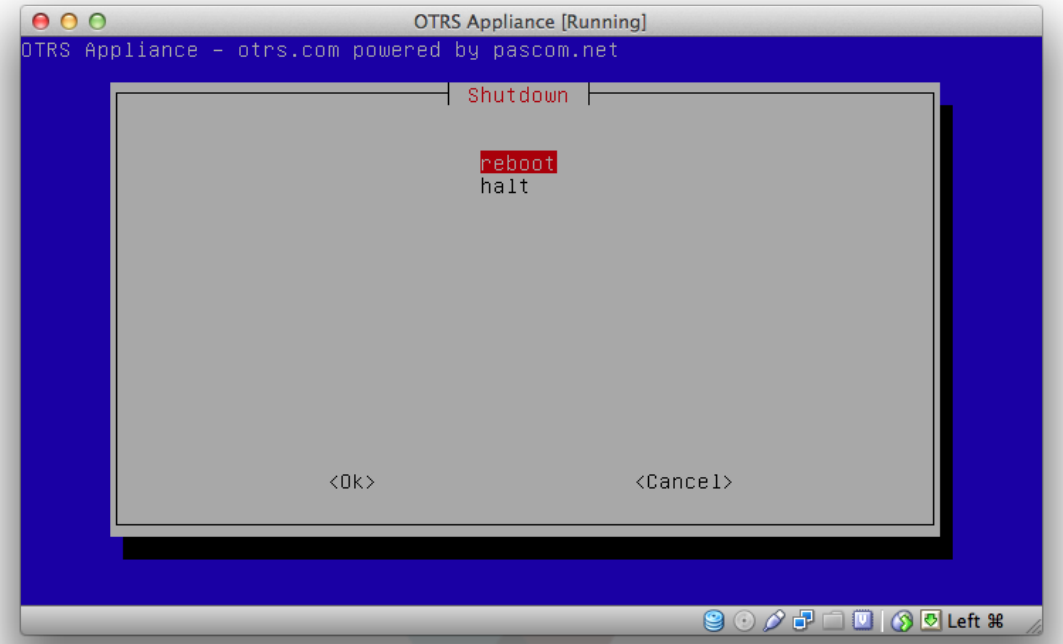
To exit from the system maintenance main menu you need to choose "Logout" and confirm with "Ok".

3. Configure network

Here you can configure the network interface or add additional network interfaces.

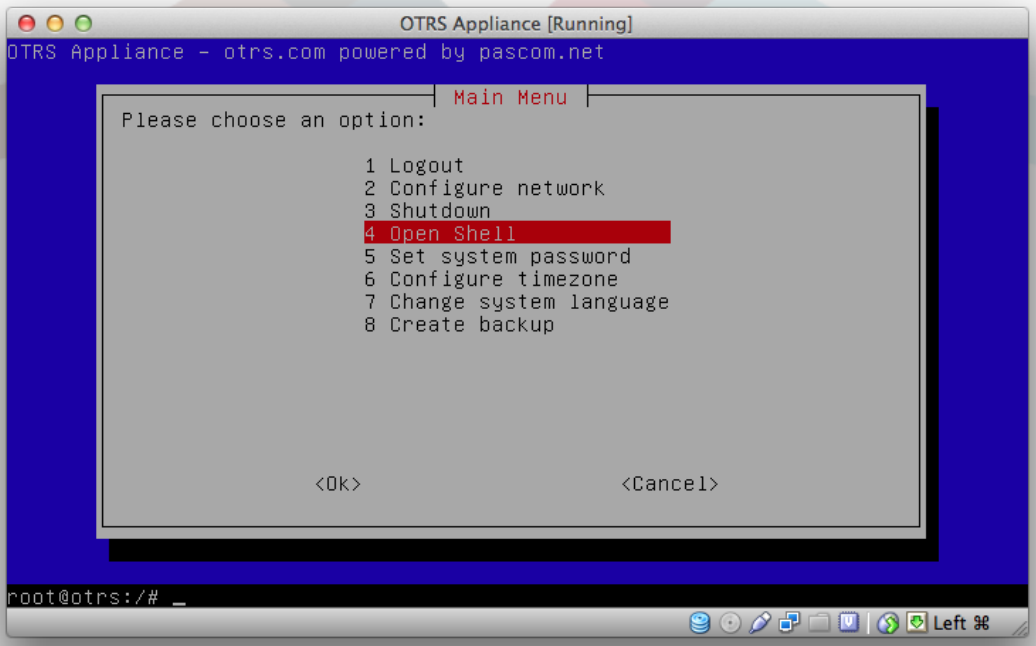
4. Shutdown

Here you can reboot or shutdown your system.



5. Open Shell

Here you can open a linux shell to get direct access to the appliance.



6. Set system password

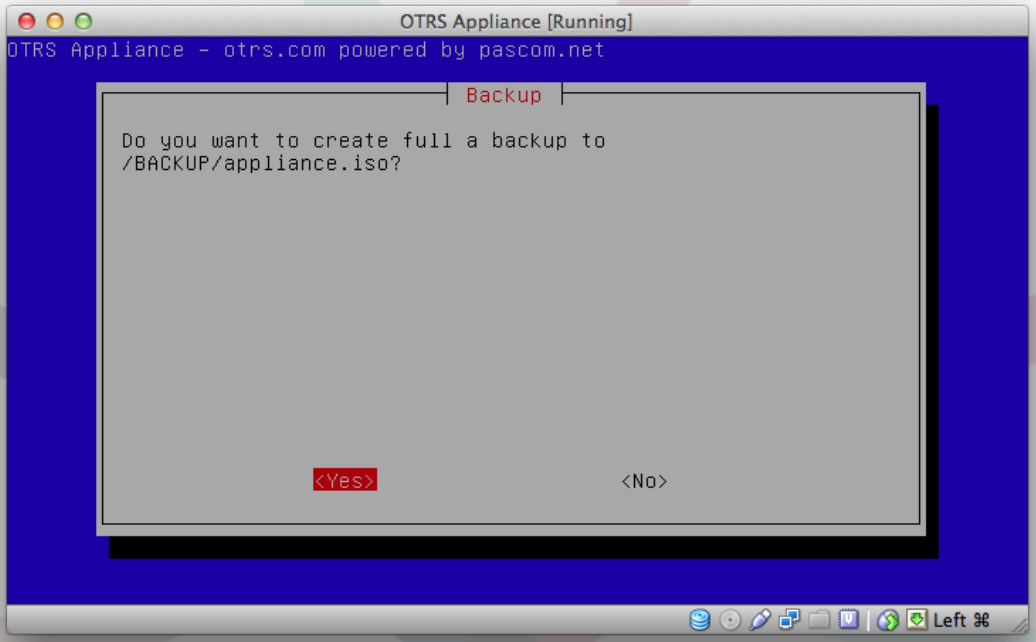
Here you can change the system password that has been set during the installation.

7. Configure timezone

Here you can change the timezone of your system.

8. Change system language

Here you can change the system language. You have the choice between English and German.

9. Create backup

You can create a full backup of your system. The backup will be stored as an ISO image in the file system of the appliance in /BACKUP/appliance.iso