

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-4.0.2-appliance.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".

000	Create Virtual Machine	
8	Name and operating system	
	Please choose a descriptive name for the new virtual machin select the type of operating system you intend to install on name you choose will be used throughout VirtualBox to ide machine.	ne and it. The ntify this
	Name: OTRS Appliance	
	Version: Linux 2.6	÷
	Hide Description Co Pack	Continuo

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".



🧼 🎲 🤿	4	😥 Details 🛛 🔟 Snapshots (
00	Create Virtual Hard Drive	
	Hard drive file type	
	Please choose the type of file that you wo virtual hard drive. If you do not need to u software you can leave this setting unchat VDI (VirtualBox Disk Image) VMDK (Virtual Machine Disk) VHD (Virtual Hard Disk) HDD (Parallels Hard Disk) QED (QEMU enhanced disk) QCOW (QEMU Copy-On-Write)	ould like to use for the new use it with other virtualization inged.
	Hide Descript	tion Go Back Continue
_	Nesteu raying, PAF/NX	

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".



	Oracle VM VirtualBo	x Manager
2. 2. 2 - V	~	🔅 Details 🔟 Snapshots
● ○ ○	Create Virtual Hard	d Drive
	File location and size	
	Please type the name of the new or click on the folder icon to se OTRS Appliance Select the size of the virtual have limit on the amount of file data store on the hard drive.	w virtual hard drive file into the box below elect a different folder to create the file in. where the state of the state
		Go Back Create
	PAE/NX	ayiny,

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.



New Se	ttings Start I	Discard	Appliance – Netw	vork			
General	System Displa	ay Storage	Audio Networ	rk Ports	Shared Folders		-
C Er	Adapte nable Network A Attached to: Name: Advanced	apter Bridged Ad en1: WLAN	ter 2 Adapter apter + (AirPort)	3 Adaş	oter 4	÷	Appliance
(?)				ſ	Cancel	ОК	, 8,00 CB)

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.



Ceneral System Display Storag	Audio Network Ports Shared Folders	
Storage Tree Controller: IDE Controller: SATA OTRS Appliance.vdi	Attributes CD/DVD Drive: IDE Secondary = Live CD/DVD Information Type: Size: Location:	Appliance Choose a virtual CD/DVD disk file Host Drive 'HL-DT-ST DVDRW CS23N' 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.i otrs-3.3.0.beta3.D131001.147_amd64.B14.i otrs-3.3.0.beta3.D130930.145_amd64.B12.i
 (?) 	Attached To: Cancel	Remove disk from virtual drive



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.



	Please select a language:
	de deutsch english
	<u>< 0</u> K >
-	

3. Harddisk selection

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

Please select a hard	disk for installa	ation:	
sda 81	92MB (VBOX_HARDD IS	SK)	
L			
	<u>< 0</u> K >		
	<u>< 0</u> K >		

4. Harddisk deletion

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



WARNING !!! All data on the selcted harddisk will be deleted. Is this OK?
<pre></pre>

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.

P:	ease enter a new	ı system passwor	rd:	
	··^			
	<uk< td=""><td>> </td><td><cancel></cancel></td><td></td></uk<>	> 	<cancel></cancel>	

7. Network interface selection

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



Pleas	e select a network inter	face for configuration:	
	ethO unconfigured (Inte + Add new virtual in	<u>l Corporation 82540EM Giga)</u> terface	
	<0k>	<cancel></cancel>	

8. Network interface mode

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

Please select a mode for th	│ Mode │ he network interface:	
static Con <mark>dhcp Con</mark> unconfigured Disa	figure a static ip address figure as DHCP client able this interface	
<0k>	<cancel></cancel>	

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.



		[Bootmode]
Please use the web interface http://SERVER-IP/otrs/index Default User: root@localhos	e: pl t Pass: root	The Appliance is currently running in harddisk mode.
[Interfaces]		
eth0 dhcp UP	192.168.178.27 In	tel Corporation 82540EM Gi

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.

OTRS A	onliance - Storage	Details Snapshots
Image: System Display Storage Storage Tree Image: Storage Storage Image: Storage Tree Image: Storage Image: Storage Image: Storage Image: Storage Tree Image: Storage Image: Storage Image: Storage Image: Storage Tree Image: Storage Image: Storage Image: Storage Image: Storage Image: Storage Image: Storage Image: Storage Image: Storage	Audio Network Ports Shared Folders Attributes CD/DVD Drive: IDE Secondary ‡ Live CD/DVD Information Type: Image Size: 291,93 MB Location: /Users/udo/Downl Attached To: OTRS Appliance	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_amd64.816.iso otrs-3.3.0.beta3.D131001.147_amd64.814.iso otrs-3.3.0.beta3.D130930.145_amd64.812.iso Remove disk from virtual drive
? N	Cancel Cancel	



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.

● ○ ○ 🔆 Login - OTRS 4 ×		κ ²
← → C 🗋 192.168.178.27/otrs/index.pl		🌣 💽 🥯 🔜 =
	Welcome to OTRS 4	
	* Username: root@localhost	
	* Password: **** Login	
	Lost your 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".

ashboard Customens Tickets	Statistics Admin Q				
Agent Management		Customer Management		Email Settings	
Agents Create and manage agents. Agents <> Groups Link agents to groups. Agents <> Roles Link agents to roles.	Create and manage groups. Roles Create and manage roles. Polies - Create and manage roles. Polies - Create and Link roles to groups.	Customer User Create and manage outsomer users. Customer User <> Groups Link customer user to groups.	Customen Create and manage customers. Customer User <> Services Link customer user to services.	PostNeaser Nai Accounts Manage PCP3 or IMAP accounts to fetch email form. Email Addresses Set sender email addresses for this system. PGP Keys Manage PCP keys for email encryption.	PostMaster Filters Filter incoming emails. SMMEC_contractes Manage SMMME certificates for email encryption.
Queue Settings		Ticket Settings		System Administration	Online Admin Manual
Course Creates and manage quotes. Templates <> Course Link templates to quotes. Atto Responses <> Course Link quotes to auto response. Attachments <> Templates. Signatures Creates and manage signatures.	Terrational Create and manage templates. Auto Responses Create and manage responses that are entorematically set Create analyse attachments. Salvastore Create and manage salutations.	Agency outfloations that are sent to agents. Types Crustes and manage ticket types. States Crustes and manage ticket states. Services Crustes and manage services. Crustes and manage Services Level Agreements (Crustes and manage Service Level Agreements (Crustes)	Nortications (Sent) Create and manage work based notifications. Access Control Lats (ACL) Configure and manage ACLs. Prototee Create and manage toket priorities. Dynamic Fields Create and manage dynamic fields.	Control/part Managa tasks/security 2013 Baueaes Soutcom** Optional Soutcom** Soutcom** Adm Notifications to users. System Lag House Som configure processes. System Carl Soutcom** Configure Processes. Web Contain and manage web services. Contain and manage web services.	System Registration Manage system registration. Service Center Manage OTHIS Group services. Sector Management Manage existing sessions. Performance Log Ware parformance benchmark results. SOL Box Soc. Box Soc. Box Execute SOL statements. Performance Logical and seated your system with software parsages.
		Powwee Appliance	i by OTRS 4 by pascom.net		

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

● ● ● ● ★ OTRS Appliance Manager - ×		R
← → C 🗋 192.168.178.42/otrs/i	ndex.pl?Action=AdminOTRSApplianceManager	☆ 🏘 🤷 🖪 =
Oashboard Customers Tickets Statist	cs Admin Q	
OTRS Appliance Manager		
Hint	Update	
Here you can manage your OTRS appliance. You can update your system, reboot or	Your system is already up to date. There are no updates available.	
shutdown.	Reboot	
	Here you can reboot your UTHS applance.	
	Shutdown	
	Here you can shutdown your OTRS appliance.	
	Revenued by OTRB 4 Applancie by pasconnat	



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.

Please u http://S Default	ise the w ERVER–IP User: ro	⊔eb interf Votrs∕ind ot@localh	ace: lex.pl lost Pass: ro	pot		The Appliance is currently running in harddisk mode.
[Interfac	:es]					
eth0	dhcp		192.168.	178.27 Ir	ntel C	orporation 82540EM Gig

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.



<mark>1 Logou</mark> 2 Confi 3 Shutd 4 Open 5 Set s 6 Confi 7 Chang 8 Creat	gure network Dwn Shell gstem password gure timezone e system language e backup
<0k>	<cancel></cancel>

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.



re	boot	
ha	lt	
<0k>	<cancel></cancel>	

5. Open Shell

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

6 Cor 7 Cha 8 Cre	ange system lan ate backup	nguage	
<0k>		<cancel></cancel>	

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

Do you u /BACKUP/	ant to create full a backu appliance.iso?	ip to	
	KYes>	<no></no>	
		9 0 Ø P I	🗅 🛄 🔗 🗗 Left ೫