

Getting Started With BackBox Evaluation Guide: On-Premises Deployment





BackBox is an automation platform used to automate backups, perform restores, and execute tasks across the network. Features include password changes,					/	/
consistent device upgrades, proactive device condition checks, alerts, and notifications.				/		
					/	
BackBox installation is supported on common virtualization products such as VMware. Hyper-V, and Xenserver. It can also be installed on a bare metal server.						/
This document outlines the process for an administrator to deploy the Backbox					/	
Vii tuai appilarice.						
To successfully install the BackBox platform, you will need to:						
 Download the appropriate image for your Hypervisor and understand the sizing requirements. (Installation of BackBox OS will take less than 20 minutes) 						
 Create a new Virtual Machine (VM), either: a. VMware ESXi (OVA) 						
b. Hyper-V (VHDX)						
3 . Run the First Time Wizard						
4. Verify the installation						
5. Add a Device and Run a Backup						
					/	
Section 1 download the appropriate image				/		/
Prerequisites:						
Administrative access to the target Hypervisor.						/
Virtual Machine sizing information can be found <u>HERE.</u>						
Download the appropriate image for your Hypervisor.						
OVA formatted images as well as VHDX based disks are available from BackBox with the						
links below.						
 OVA (ESXi, XenServer, Nutanix, etc) click <u>HERE.</u> VHDX (Hyper-V) click <u>HERE</u> 					/	
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Section 2	CREATE A NEW VIRTUAL	MACHINE VM				/	/
2a. VMware	ESXi (OVA)						
						/	
Deployment for \	/Mware ESXi:						/
This document will de imported through the	ploy through the VSphere interfa VCenter console.	ice. The provided OVA can also be				/	
_							/
1 Navigate to the	ESXi VSphere Console						
2 Select the optio	n to Create/Register VM						/
William Ware ESXi	🗇 🗇 esxi-01						/
Host	Get vCenter Server 1 1 Create/Register VM	🐻 Shut down 🕵 Reboot 🧲 Refresh 🏟 Actions					
Monitor	esxi-01 Version: 7.0 Upd	ate 3				/	/
ED Virtual Machines El Storage Q Networking	State: Normal Uptime: 19.03 d	(not connected to any vCenter Server) ays			/		
						/	
3 Select Deploy a	virtual machine from an OVF or O	VA file.					/
🔁 New virtual machine						/	
 1 Select creation type 2 Select OVE and VMDK files 	Select creation type						
3 Select storage 4 License agreements	How would you like to create a Virtual Machine?	This option suides you through the process of grapting o					
5 Deployment options 6 Additional settings	Create a new virtual machine Deploy a virtual machine from an OVF or OVA file	virtual machine from an OVF and VMDK files.					
7 Ready to complete	Register an existing virtual machine						
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vm ware [*]						/	
		Back Next Finish Cancel					/

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Name the virtual machine, and select or drop the OVA file into the field provided.



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Select the appropriate storage location for the virtual machine.

Provide the section of the section o	0.05					
 1 Select creation type 2 Select OVF and VMDK files 3 Select storage 4 License agreements 5 Deployment options 6 Additional settings 7 Ready to complete 	Select storage Select the storage type and datastore Standard Persistent Memory Select a datastore for the virtual machine's c	onfiguration files	s and all of its' v	irtual disks.		
	Name ~	Capacity 🗸	Free ~	Type ~	Thin pro 🗸	Access ~
	esxi-01-ds1	1.82 TB	1.36 TB	VMFS6	Supported	Single
	esxi-01-sata	110.25 GB	29.7 GB	VMFS6	Supported	Single
	ISOs	4.32 TB	4.27 TB	NFS	Supported	Single
	NFS	4.59 TB	4.34 TB	NFS	Supported	Single
						4 items
vm ware [.]						
			Ba	ck Ne	xt Finis	h Cancel

Set the initial default NIC's network mapping. Additional network interfaces can be attached post-deployment.

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7 Ensure that ye	ou have the appropri	ate Disk	provisio	oning setting selected.		_				
New virtual machine - BackBo	x v7.00.05									
1 Select creation type 2 Select OVF and VMDK files	Deployment options Select deployment options									
4 Deployment options									_	
5 Ready to complete	Network mappings	VMs	VMs	~						/
	Disk provisioning	🖲 Th	in O Thick							
	Power on automatically									
				,						/
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vmware										
				Back Next Finish Cancel						
The default vi and 120GB of	rtual CPUs assigned Disk.	will be 4	cores w	vith a single socket, 8 GB of RAM,					/	/
New virtual machine - BackBo	x v7.00.05									
1 Select creation type 2 Select OVF and VMDK files	Ready to complete Review your settings selection b	efore finishing th	ie wizard					/		/
3 Select storage 4 Deployment options	Product		7 00 05							
5 Ready to complete	VM Name	BackB	30X V7 00 05							
	Files	backb	ox70005-disk	:1.vmdk						/
	Datastore	NFS								
	Provisioning type	Thin								
	Network mappings	VMs:	VMs							
	Guest OS Name	Unkno	own							1
	Do not refresh vo	ur browser while	e this VM is be	eina deploved						
	• Bo not remeaning									
vm ware [®]									/	
				Back Next Finish Cancel						/

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The import can be monitored within Monitor > Tasks. This may take several minutes depending on the internal network speed, and usage of the target virtual host.

esxi-01 - Monit	tor					
Performance	Hardware	Events	Tasks	Logs	Notifications	
C Refresh	🛟 Actions					
Task			~	Result 🔺		~
Import VApp						○
Upload disk - b	ackbox70005-dis	k1.vmdk (1 o	f 1)			\otimes
Create VM				🕑 Compl	eted successfully	
install Date				Complete	eted successfully	
install Date				🔮 Compl	eted successfully	

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Once the deployment has completed, start the VM and navigate to the IP address shown on the Virtual host to proceed.

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2b. Microsoft Hyper-V (VHDX) Prerequisites for Hyper-V: Requirements for Microsoft Hyper-V on Windows Server can be found HERE. Requirements for Microsoft Hyper-V on Windows 10 / Windows 11 can be found HERE. Deployment for Hyper-V: Create a new Virtual Machine (VM) for Hyper-V. Open the Hyper-V Manager. Right-click the server you wish to deploy on, select New > Virtual Machine. Hyper-V Manager Action View Help File 🗢 🔿 🙋 🖬 🚺 📻 Hyper-V Manager Virtual Machines Quick Create... ອາປ e. . . New Σ Virtual Machine... Hard Disk... Import Virtual Machine... Floppy Disk... Hyper-V Settings... Virtual Switch Manager... Virtual SAN Manager... Edit Disk... Inspect Disk... Stop Service Remove Server Refresh View > Help



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Set a name for	the virtual machine, and confirm the location to store the virtual				
3 machine.					
📒 New Virtual Machine Wiza	rd X				
Specify Nam	e and Location				/
Before You Begin Specify Name and Location	Choose a name and location for this virtual machine. The name is displayed in Hyper-V Manager. We recommend that you use a name that helps you easily identify this virtual machine, such as the name of the quest operating system or workload.				/
Specify Generation Assign Memory	Name: BackBox v7.00.05				
onfigure Networking onnect Virtual Hard Disk	You can create a folder or use an existing folder to store the virtual machine. If you don't select a folder, the virtual machine is stored in the default folder configured for this server.				
Installation Options	Store the virtual machine in a different location				
ummary	Location: C: \VMs \ Browse If you plan to take checkpoints of this virtual machine, select a location that has enough free				
	space. Checkpoints include virtual machine data and may require a large amount of space.				
	< Previous Next > Finish Cancel				/
Soloct Conorati	ion 1 for the Virtual Machine Constation Nate: Setting the Virtual Machin				
generation to C	Generation 2 will result in a failure to boot the BackBox appliance.				/
New Virtual Machine Wiza	ard X				
Specify Gen	eration				
Before You Begin Specify Name and Location	Choose the generation of this virtual machine.				
Specify Generation Assign Memory	This virtual machine generation supports 32-bit and 64-bit guest operating systems and provides virtual hardware which has been available in all previous versions of Hyper-V.				/
Configure Networking Connect Virtual Hard Disk	Generation 2 This virtual machine generation provides support for newer virtualization features, has UEFI-based formulate and requires a supported 64 bit quest operating sustem				
Installation Options Summary	▲ Once a virtual machine has been created, you cannot change its generation.				/
, ,					
	More about virtual machine generation support				
	< Previous Next > Finish Cancel				



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5 Assign the amou environment.	Int of memory to the Virtual Machine that is required for your				/	
Reference the B	ackBox Sizing Guide for additional information on requirements and			/		
Note: Dynamic	Memory is recommended to be disabled. Enabling Dynamic Memory					
could result in p	erformance degradation of the host as BackBox starts Automations.					
🖳 New Virtual Machine Wiza	d ×				/	
X Accian Mom						
Assign Mente	n y					
Before You Begin Specify Name and Location	Specify the amount of memory to allocate to this virtual machine. You can specify an amount from 32 MB through 251658240 MB. To improve performance, specify more than the minimum amount					/
Specify Generation	recommended for the operating system.					
Assign Memory	Use Dynamic Memory for this virtual machine.					/
Configure Networking Connect Virtual Hard Disk Installation Options	When you decide how much memory to assign to a virtual machine, consider how you intend to use the virtual machine and the operating system that it will run.					
Summary						/
						/
	< Previous Next > Finish Cancel					/

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6 Configure netwo	orking as re	equired by yo	ur environme	ent.		
🖳 New Virtual Machine Wizar	d					×
💴 Configure Ne	tworking					
Before You Begin Specify Name and Location	Each new virt virtual switch,	ual machine includes , or it can remain dis	s a network adapter. connected.	. You can configure	e the network adap	ter to use a
Specify Generation	Connection:	Default Switch			~	
Assign Memory						
Configure Networking						
Connect Virtual Hard Disk						
Installation Options						
Summary						
			< Previous	Next >	Finish	Cancel

In the Virtual Disk selection menu, either Use an Existing Virtual Disk, pointing to the downloaded VHDX, or choose the option to Attach a Virtual Disk later.



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8 Review the sum	mary and select Finish to generate the Virtual Machine.	
New Virtual Machine Wiza	rd the New Virtual Machine Wizard	×
Before You Begin Specify Name and Location Specify Generation Assign Memory Configure Networking Connect Virtual Hard Disk Summary	You have successfully completed the New Virtual Machine Wizard. You are about to create the following virtual machine. Description: Name: BackBox v7.00.05 Generation: Generation 1 Memory: 8192 MB Network: Default Switch Hard Disk: None To create the virtual machine and close the wizard, click Finish.	
	< Previous Next > Finish Cancel	

By default, the Virtual Machine will have a single CPU core. It is highly recommended at this point to increase the number of Virtual CPUs based on your environments needs.

Reference the **<u>BackBox Sizing Guide</u>** for requirements and recommendations.

Modifying Virtual Machine Configuration: Virtual CPU



To assign additional virtual CPUs or to attach a disk to the Virtual Machine, right-click the newly created Virtual Machine, and select **Settings**.

Note: If the Virtual Machine has been started, it must be placed in a stopped state before any changes can be made to the Virtual Machine configuration.

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Virtual Machines				
Name	State		CPU Usage	
Back Box v7.00.05	Off	Conn	ect	
		Settin	gs	
		Start		
		Check	kpoint	
		Move		
Checkpoints		Expor	t	
		Renar	ne	
		Delete	e na	
		Help		

2 Highlight the Processor field on the right to modify the number of Virtual CPUs. Modify this value to match the needs of the environment.

Reference the **BackBox Sizing Guide** for requirements and recommendations.

📸 Settings f	for BackBox v7.00.05 on DAL	E-VM-BB								—		×
BackBox v	7.00.05	~ <	▶	G								
A Hardwa	are	^ C	Pro	cessor -								_
F Add BIO Boo Secu Key	Hardware S vt from CD u rity y Storage Drive disabled	Ye th N	ou can ne phy umber	n modify t vsical com of virtua	he number o puter. You o I processors	of virtual p can also m	orocessors odify othe	based or r resourc	n the numb æ control s	er of pro ettings.	cessors o	'n
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	DVD Drive None		Virtu	al machin	e limit (perce	entage):		100]			
SCS	I Controller		Perce	ent of tot	al system re	sources:		50				
🛨 🖣 Netv Def	work Adapter Fault Switch		Relat	tive weigł	nt:			100]			
CON Nor	11 ne		Δ	Hyper-V	is not config	jured to ei	nable proc	essor res	ource cont	rols.		
CON Nor	1 2 ne		Lean	n more ab	oout Hyper-\	V processo	or configur	ation opt	ions.			
Disk Nor	ette Drive ne											
🛠 Manag	ement	_										
I Nam Bac	e kBox v7.00.05											
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Sma C:\	r t Paging File Location VMs\BackBox v7.00.05											
Res	omatic Start Action start if previously running	~										
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Modifying Virtual Machine Configuration:

Virtual Disk



To attach a virtual disk if one was not selected during the Virtual Machine generation, select the IDE Controller 0 selection.

2	Choose H	Hard drive	e and t	hen clic	k Add.



3

Browse to the location of the downloaded VHDX, and select $\ensuremath{\mathsf{OK}}$.

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ckBox v7.00.05	✓ < ► [C				
Hardware	A Hard D	Drive			
Add Hardware BIOS Boot from CD	You can ch operating virtual mac	ange how this virtual ha system is installed on this hine from starting.	rd disk is attache s disk, changing t	ed to the virtual ma the attachment mig	achine. If an ght prevent the
Security Key Storage Drive disabled	Controller:		Locat	ion:	
Memory 8192 MB	IDE Contr	oller 0	∨ 0 (in	use)	
Processor 4 Virtual processors	You can by editir	compact, convert, expa ng the associated file. Sp	nd, merge, reco ecify the full pat	nnect or <mark>s</mark> hrink a v h to the file.	virtual hard disk
IDE Controller 0	Virtu	ual hard disk:			
Hard Drive backbox70005.vhdx	C:\	VMs\BackBox v7.00.05\b	ackbox70005.vł	ndx	
IDE Controller 1	O Phy	New	Edit	Inspect	Browse
SCSI Controller Network Adapter Default Switch	0	If the physical hard disl	k you want to us	e is not listed, mak	ke sure that the
		disk is offline. Use Disk	Management on	the physical comp	uter to manage
COM 1 None		physical hard disks.			ater to manage
COM 1 None COM 2 None	To remove	physical hard disks. the virtual hard disk, clic	k Remove. This	disconnects the di	sk but does not
COM 1 None COM 2 None Diskette Drive None	To remove delete the	physical hard disks. the virtual hard disk, did associated file.	k Remove. This	disconnects the di	sk but does not Remove
COM 1 None COM 2 None Diskette Drive None None None None None None None Non	To remove delete the	physical hard disks. the virtual hard disk, did associated file.	:k Remove. This	disconnects the di	sk but does not Remove
COM 1 None COM 2 None Diskette Drive None Management X Name BackBax v7 00 05	To remove delete the	physical hard disks. the virtual hard disk, dic associated file.	ck Remove. This	disconnects the di	sk but does not Remove
COM 1 None COM 2 None Diskette Drive None Management Name BackBox v7.00.05 Integration Services Some services offered	To remove delete the	physical hard disks. the virtual hard disk, dic associated file.	ck Remove. This	disconnects the di	sk but does not
 	To remove delete the	physical hard disks. the virtual hard disk, dia associated file.	d: Remove. This	disconnects the di	sk but does not

Once configured, select **OK** on the Virtual Machine settings to apply the changes.

Start the VM and navigate to the IP address shown on the Virtual host to proceed.

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Section 3 | RUN THE FIRST TIME WIZARD



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In your web browser, enter the IP address or host name assigned to the BackBox Server: https://IPAddress. The Login screen is displayed:



Enter the default BackBox Username and Password.

- a. Username: admin
- b. Password: password

Note: You will have the opportunity to change this password in the first-time wizard.

Once you log in you will see the End User License Agreement.

- a. You can choose to enable telemetry or check the box to opt out.
- b. Please Read, scroll down, and then click on Agree and Continue..

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You will need to select the Installation Type. This is where you choose between Management (main unit) or Agent (dependent unit). Agent units are only able to accept commands from a Management unit, so be sure you already have a Management unit before choosing Agent.



BACKBOX First Time Configuration Wizard	
Installation Type	
Choose the installation type. Choose 'Backup Agent' only in case of installing a remote distributed server. Management Console Backup Agent	
BACK NEXT	

It is best practice to change the default passwords to comply with your internal password requirements. The default credentials are listed below.

a. Default BackBox Web GUI Access:

- User: **admin**
- Password: **password**
- b. Default Backbox CLI Access:
 - User: root
 - Password: HayaldaB@gan7







BACKBOX I First Time Configuration Wizard
Configure License IP Address
Loses the IP address to be associated with the license file.
172.31.252.175
2001:db8:0:2:2472:ebff:fedc:5b46
1680::2472:ebff:fedc:5b46

Verify the BackBox IP matches the IP address you will use for configuring the license.

BACKBOX | First Time Configuration Wizard Create Demo License O Upload License File Company Name: Demo_License Expiration: 28/02/2023 Maintenance: 28/02/2023 Backups: Expiration: Simple Devices: 10000 Complex Devices: 10000 IntelliChecks: Expiration: 28/02/2023 Simple Devices: 10000 Complex Devices: 10000 28/02/2023 Expiration: Devices: 10000



Configuring an NTP server is best practice, but you could opt for manual settings if you do not have NTP.



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Enter your SMTP information using an identifying email address.

(e.g., backbox@<companydomain.com>) **Note:** this is optional and can be configured later as needed.

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Confi	gure SN	MTP Se	erver				
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Sender's emai	il address	r server that	will be used to send e-ma	ii alerts			
sender@d	lomain.com						
SMTP server							
1.2.3.4							
SMTP port							
25							
			BACK	NEXT			
EULA			DATE AND TIME LICENSE II	LICENSE FILE	SMTP SERVER	RETENTION	FINISH

Configure your global retention or choose a retention policy. The default is 30 backups but can be modified to fit the company policy. This can also be changed once the product is deployed.

BACKB	X First Time Configuration Wizard	
Configure R	etention	
Choose the amount of ba	kups that you want to keep for each device	
Backup retention :	<u>30 Backups ▼</u>	
	BACK NEXT	
EULA INSTALLATION	ADMIN DATE AND TIME LICENSE IP LICENSE FILE SMTP SERVER RETENTION	FIN





Click Download to save the BackBox unique encryption key and store it in a safe place.





Click the 'Finish!' button to apply your updates.

BACKBOX | First Time Configuration Wizard

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Section 4 | VERIFY THE INSTALLATION

To ensure the installation was successful:



Ensure you can login with updated credentials.



Add a Device and Run a backup on a device to validate functionality.

Section 5 | add a device and run a backup

How to add a New Device in BackBox and run your first backup:

1 On the Devices screen, click the Add button. The New Device Configuration dialog box appears. Add the device name, the device IP address (and if you have created them, add the Group, Agent, and/ or Site you wish to assign to the device), if not then then leave Group and Agent blank and the Site set to Global, then click **Next**.

ew Device Configuration/Details	
Device Name *	
Choose a device name	•
Name is required	
Device IP *	
Enter an IP address	
lite *	
Global	•
Group	
None	•
Agent	•
NEXT	
•	
STEP 1 STEP 2 STEP	3 STEP 4

ew Device Cor	nfiguration/	Backup Type	
Vendor *			-
Product *			-
Version *			•
Backup Type *			-
	N	EXT	
•			

Complete the Vendor, Product, Version, and Backup Type fields, and click **Next.**





Getting Started With BackBox Evaluation Guide: On-Premises Deployment

The third dialog box appears. Complete the Authentication (Use Custom=profile specific, Username, Password, (Enable Password if applicable for your device) and Port fields and click **Next.**

The fourth dialog box appears. Optionally, check Enable IntelliChecks and/or Enable Access to turn on that functionality for the device.

w Device Confi	guration/Dyr	amic Fields		×
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ort*				
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Cluster Node IP			*	
	N	EXT		
CTED 1	ETED 2	CTED 7	STED (

Enable IntelliChee	cks		
Collect			
Enable access			
Backup Retention	n	Backups	
(Leave unchecked	d for global	Settings)	
Size Deviation Pe	rcentage		
(Leave unchecked	d for global	Settings)	

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If you want to create local retention settings for the device, click the Backup Retention field.

Note: Leave unchecked to apply Global retention settings. If you turn on Backup Retention, two additional fields are displayed: one for the number of days those backups are retained, and one for choosing backups or setting retention policy. Indicate the number of backups to be retained or select Retention Policy and click the Edit button to set a new retention policy. Size deviation – override global settings for size deviation verification.

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Click Add Device, or optionally Save & Run Device, if you want to save the Device Configuration and run a Backup right away.

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CONGRATULATIONS! You have your first device connected to BackBox!

Additional BackBox Evaluation Training Guides:

- Creating Schedules, Running a Backup Job and Restore to a Previous Backup
- Create Authentication Templates, Users, Roles, Notifications and Alerting
- Compliance Assurance and Remediation with IntelliChecks
- Tasks and Automation
- BackBox Reports



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For additional information on features and functionality of BackBox visit the BackBox Help Center: support.backbox.com

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