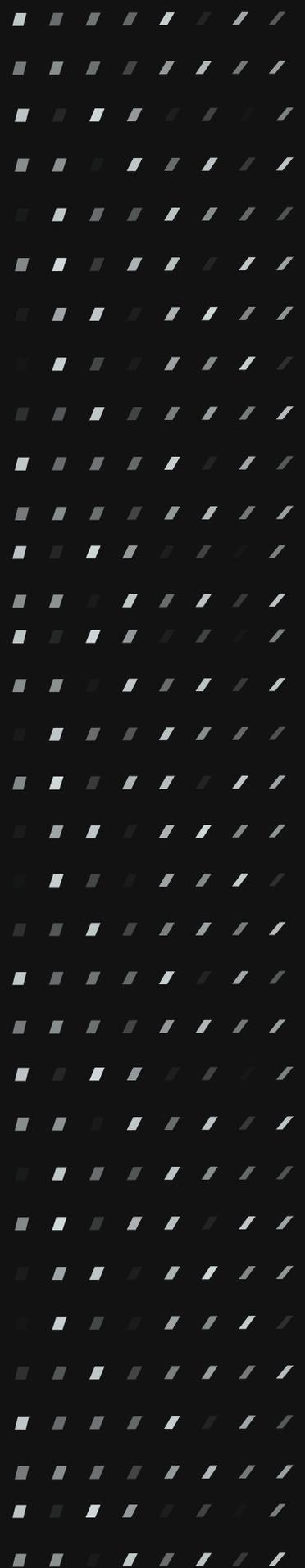


# Getting Started With BackBox Evaluation Guide: On-Premises Deployment

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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 virtual appliance.

### To successfully install the BackBox platform, you will need to:

1. Download the appropriate image for your Hypervisor and understand the sizing requirements. (Installation of BackBox OS will take less than 20 minutes)
2. 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 [HERE](#).**

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 [HERE](#).
- VHDX (Hyper-V) click [HERE](#).

## Section 2 | CREATE A NEW VIRTUAL MACHINE VM

### 2a. VMware ESXi (OVA)

Deployment for VMware ESXi:

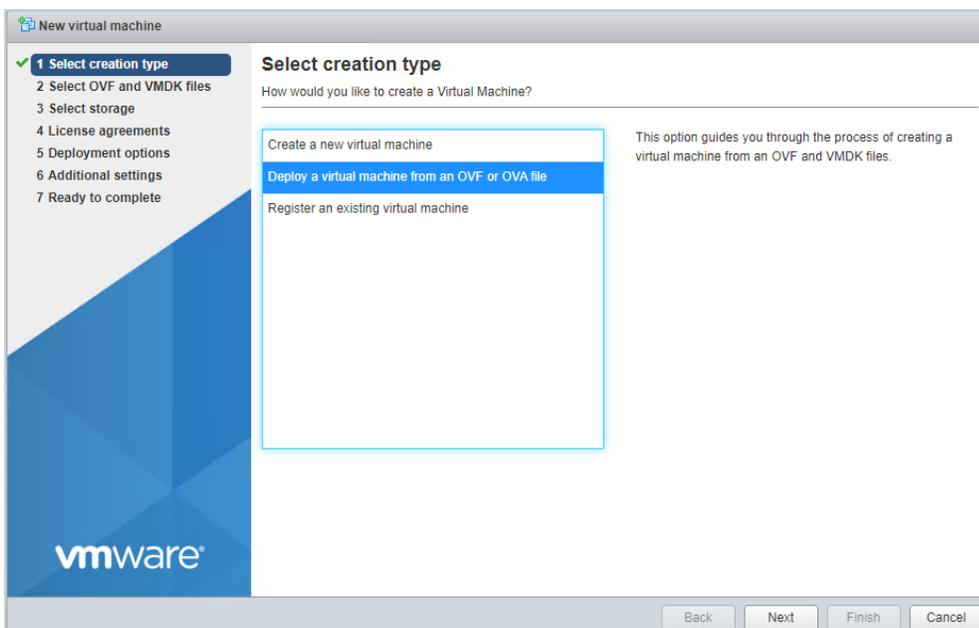
**This document will deploy through the vSphere interface. The provided OVA can also be imported through the vCenter console.**

**1** Navigate to the ESXi vSphere Console

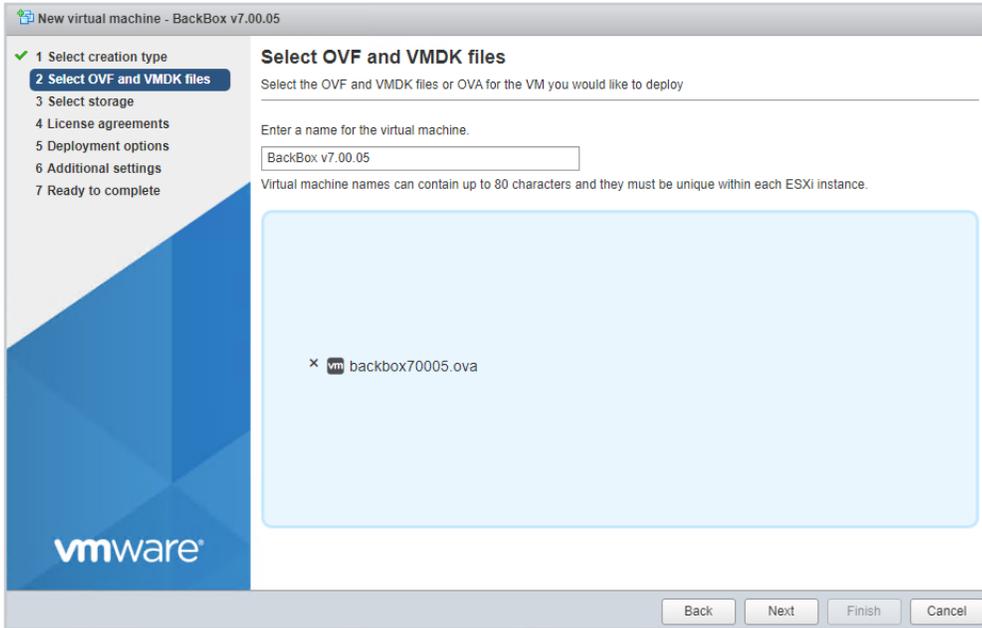
**2** Select the option to Create/Register VM.



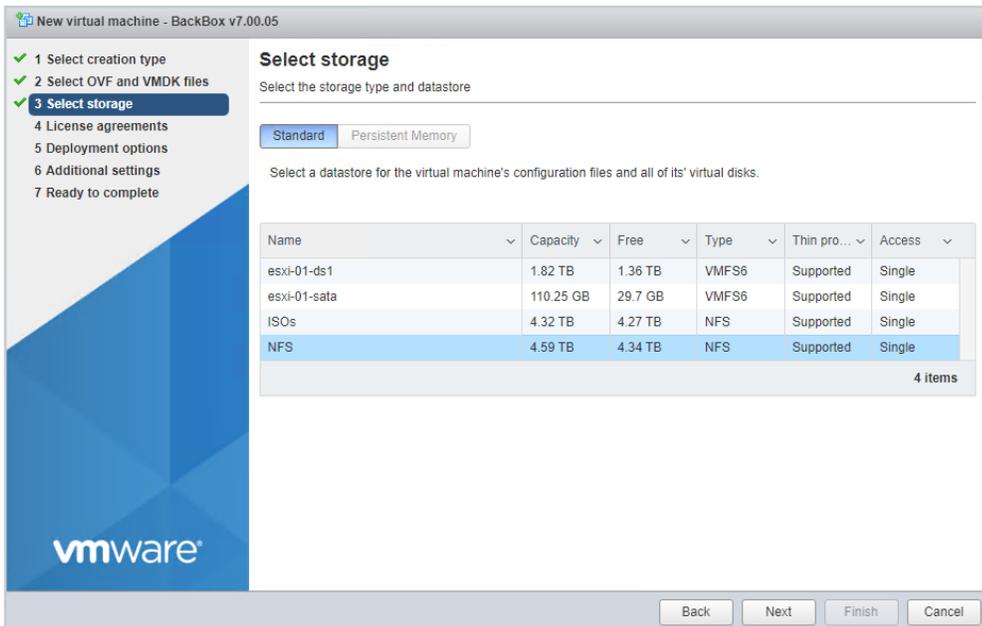
**3** Select Deploy a virtual machine from an OVF or OVA file.



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

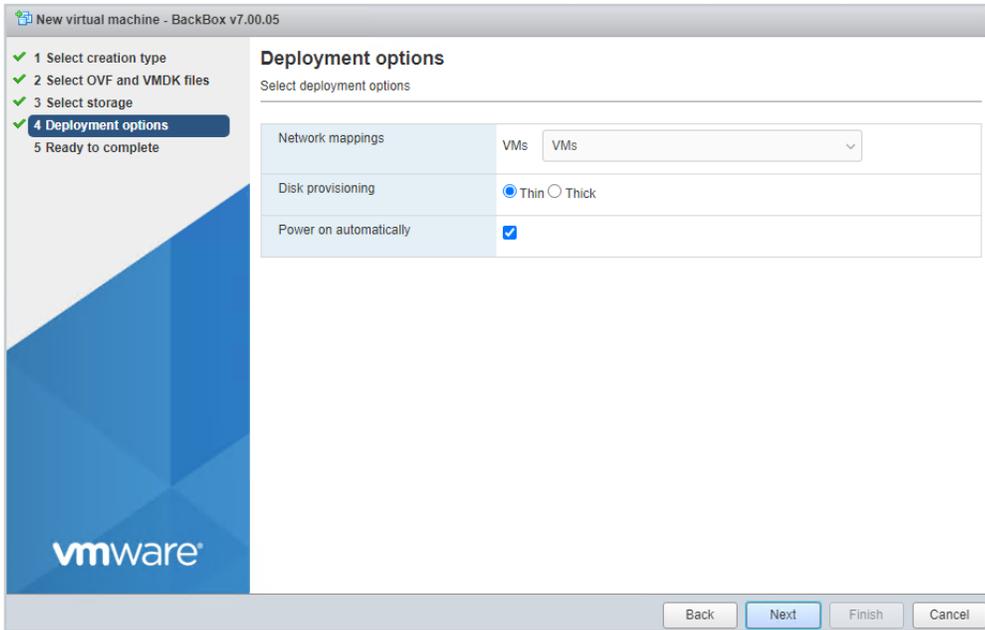


**5** Select the appropriate storage location for the virtual machine.



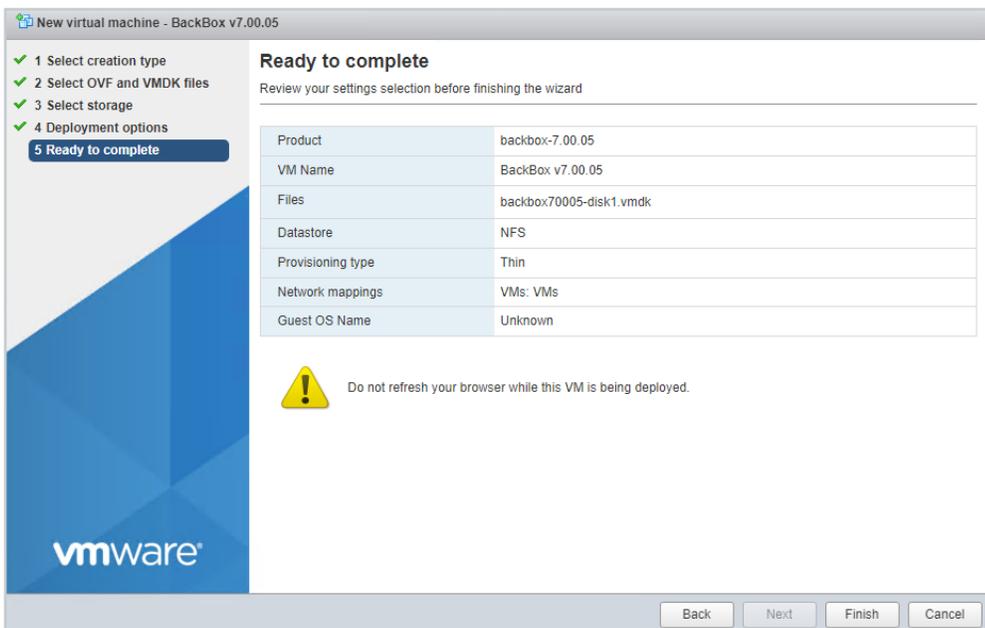
**6** Set the initial default NIC's network mapping. Additional network interfaces can be attached post-deployment.

**7** Ensure that you have the appropriate Disk provisioning setting selected.

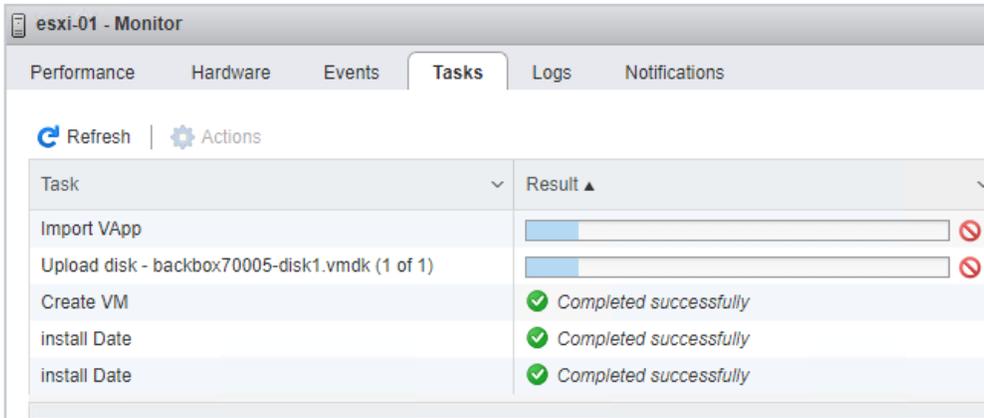


**8** Review and select Finish to deploy the OVA.

**9** The default virtual CPUs assigned will be 4 cores with a single socket, 8 GB of RAM, and 120GB of Disk.



**10** 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.



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

## 2b. Microsoft Hyper-V (VHDX)

Prerequisites for Hyper-V:

Requirements for Microsoft Hyper-V on Windows Server can be found [HERE](#).

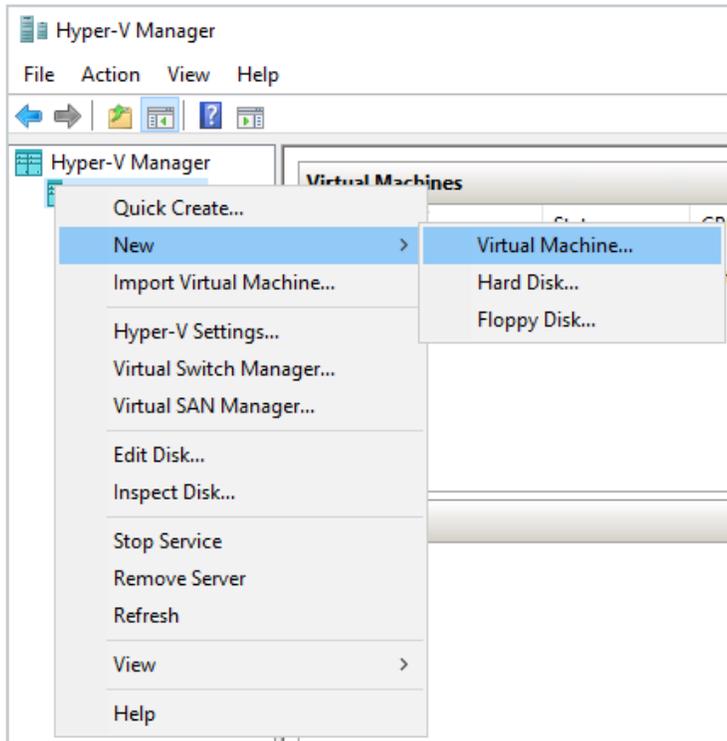
Requirements for Microsoft Hyper-V on Windows 10 / Windows 11 can be found [HERE](#).

Deployment for Hyper-V:

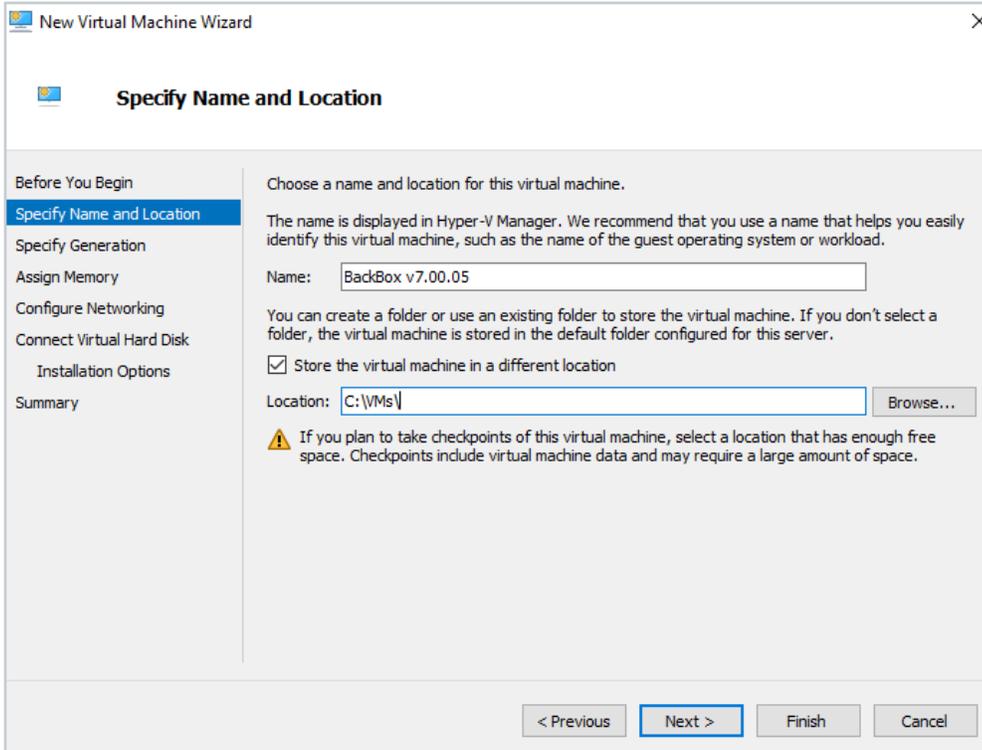
Create a new Virtual Machine (VM) for Hyper-V.

**1** Open the Hyper-V Manager.

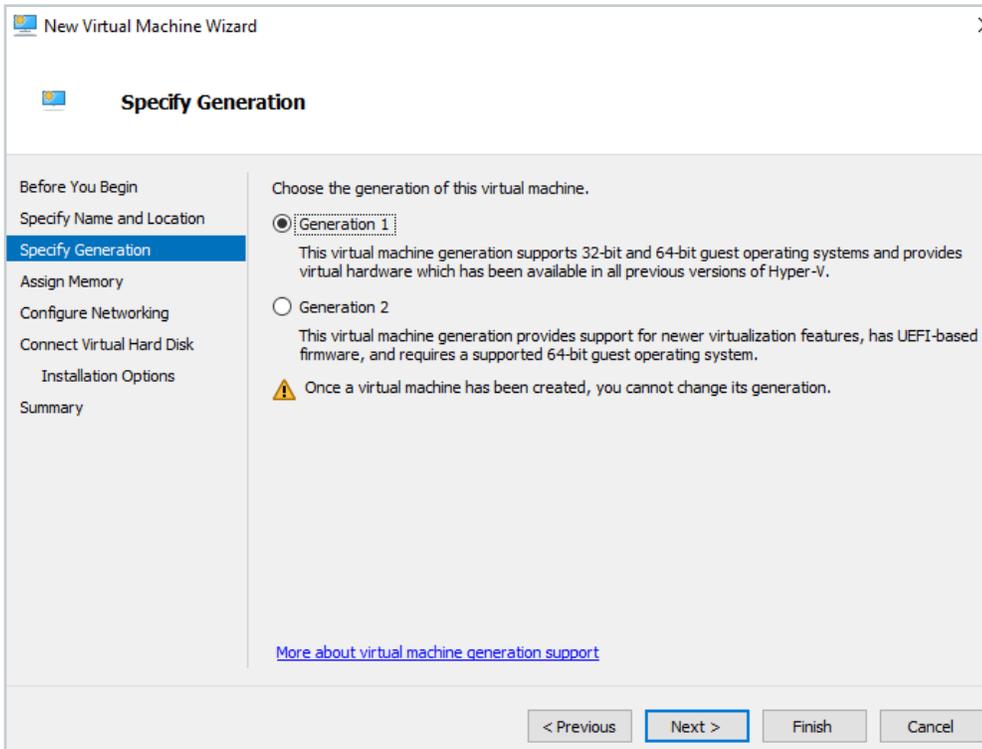
**2** Right-click the server you wish to deploy on, select New > Virtual Machine.



- 3 Set a name for the virtual machine, and confirm the location to store the virtual machine.



- 4 Select Generation 1 for the Virtual Machine Generation. **Note:** Setting the Virtual Machine generation to Generation 2 will result in a failure to boot the BackBox appliance.

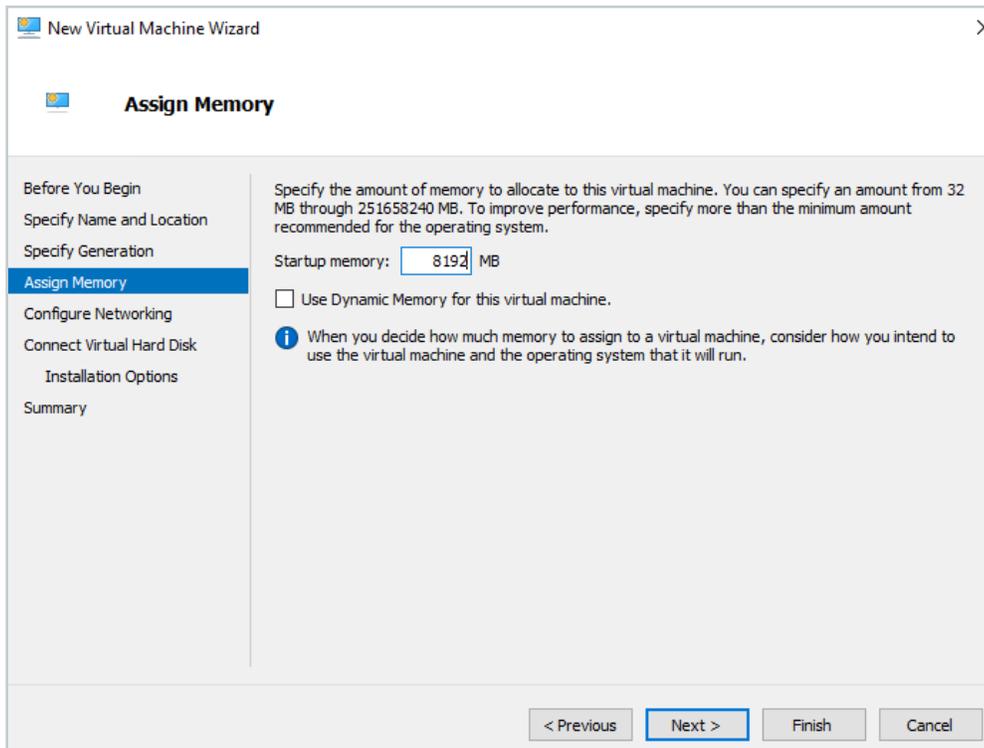


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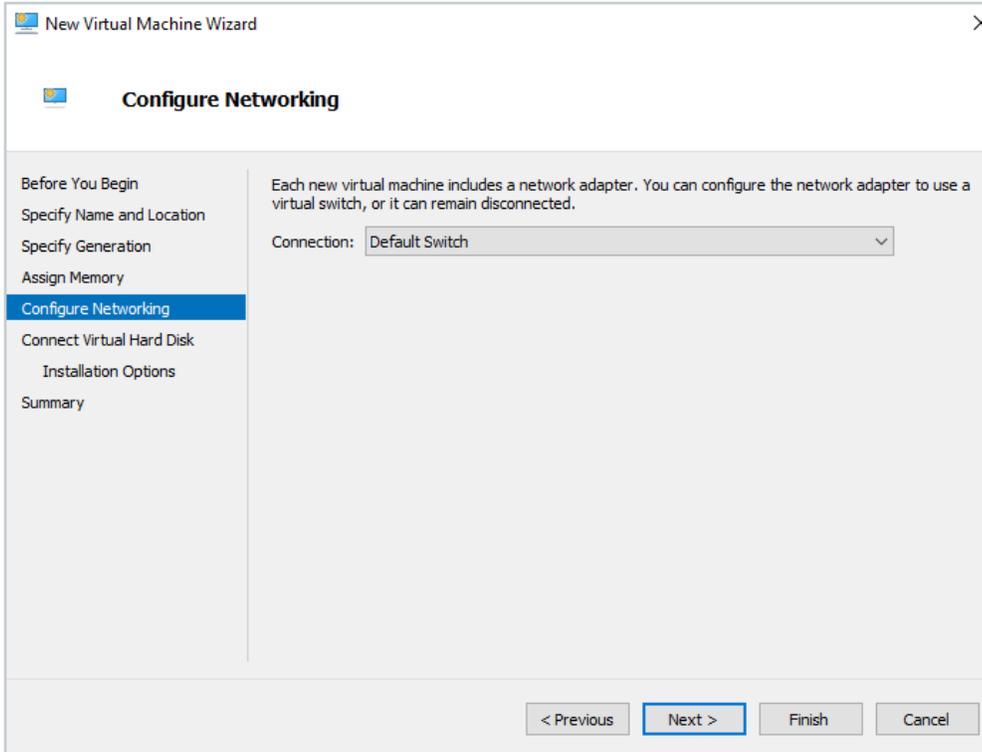
Assign the amount of memory to the Virtual Machine that is required for your environment.

Reference the [BackBox Sizing Guide](#) for additional information on requirements and recommendations for assigning Memory.

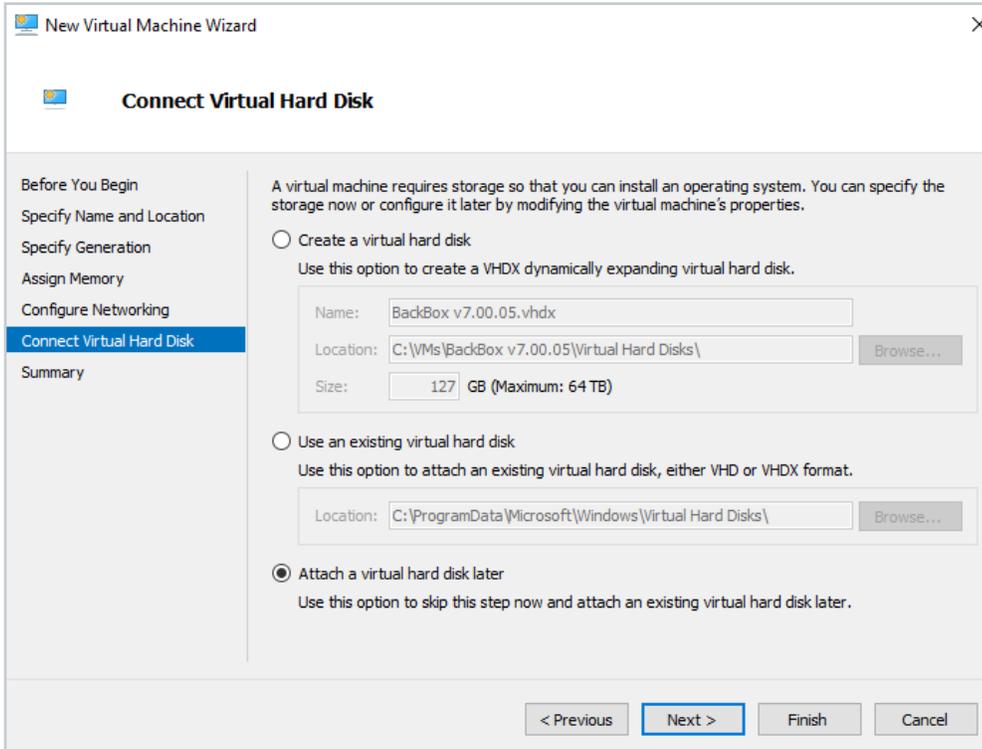
**Note:** Dynamic Memory is recommended to be disabled. Enabling Dynamic Memory could result in performance degradation of the host as BackBox starts Automations.



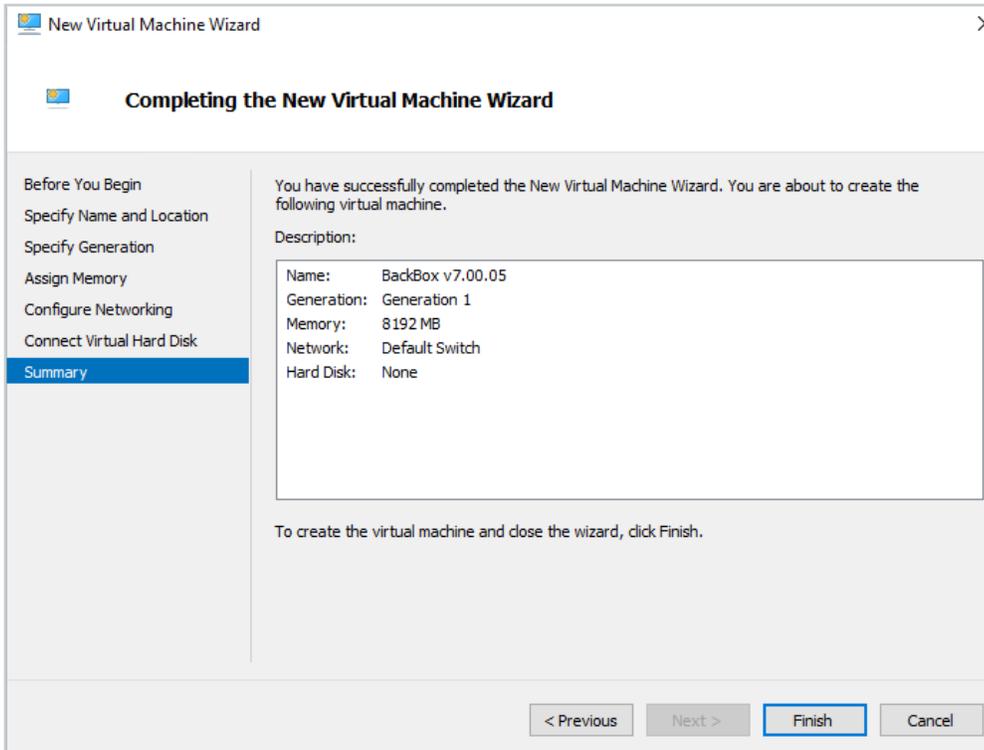
**6** Configure networking as required by your environment.



**7** 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.



**8** Review the summary and select Finish to generate the Virtual Machine.



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.

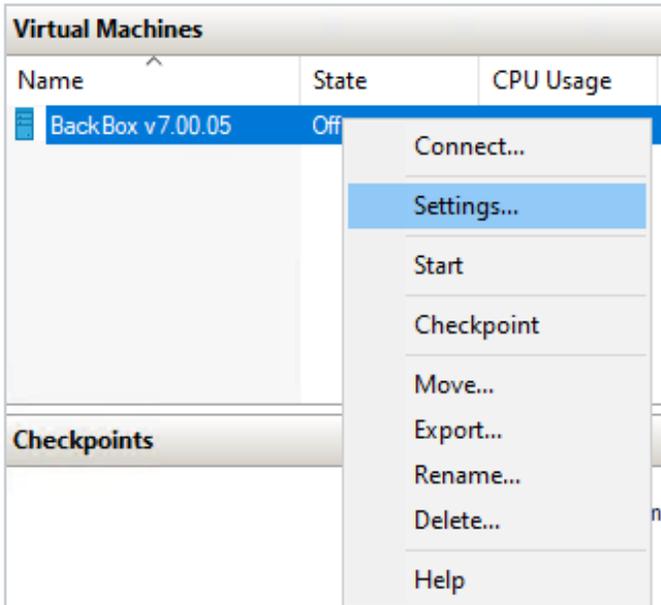
Reference the [BackBox Sizing Guide](#) for requirements and recommendations.

## Modifying Virtual Machine Configuration:

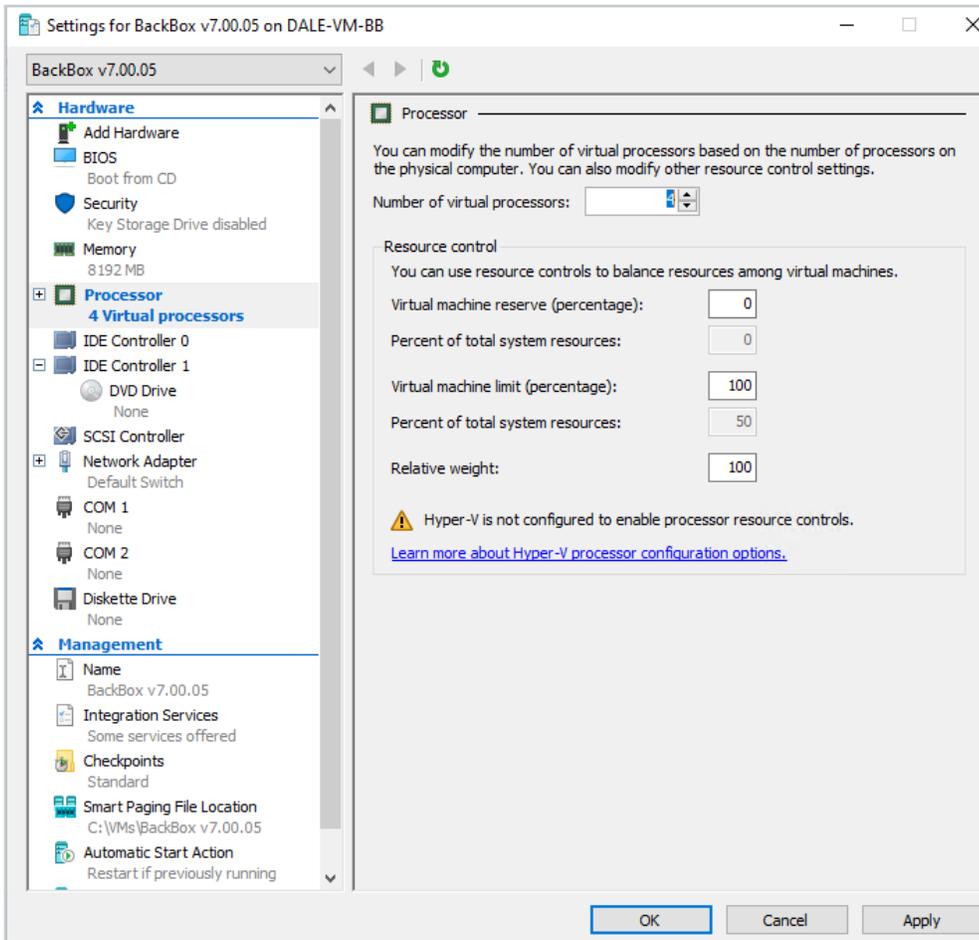
### Virtual CPU

**1** 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.



- 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.

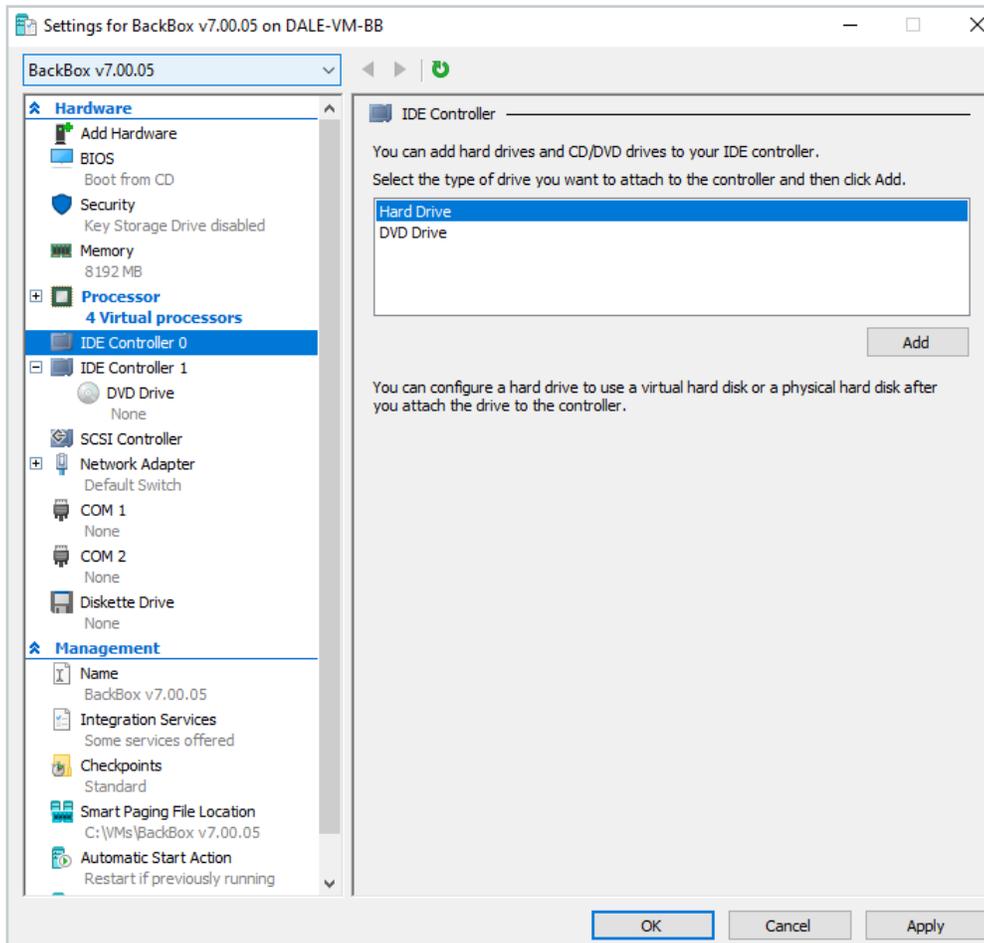


## Modifying Virtual Machine Configuration:

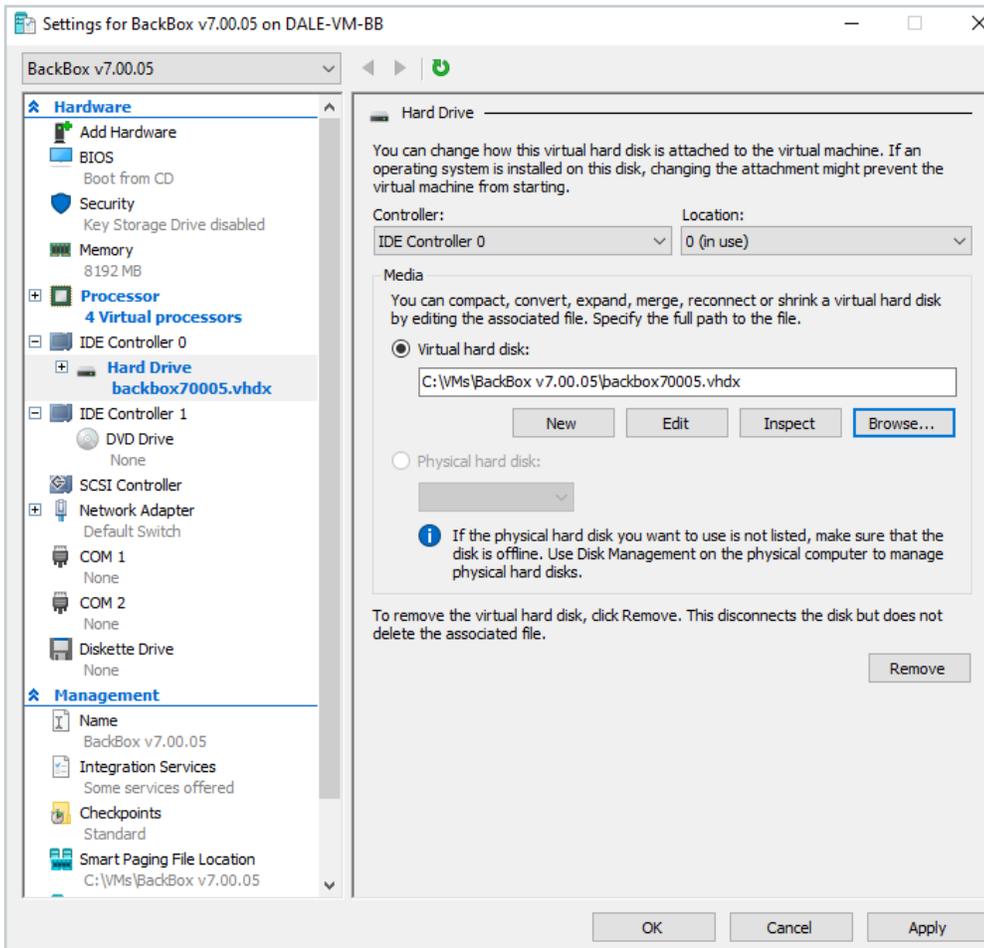
### Virtual Disk

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

**2** Choose Hard drive and then click **Add**.



**3** Browse to the location of the downloaded VHDX, and select **OK**.



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

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

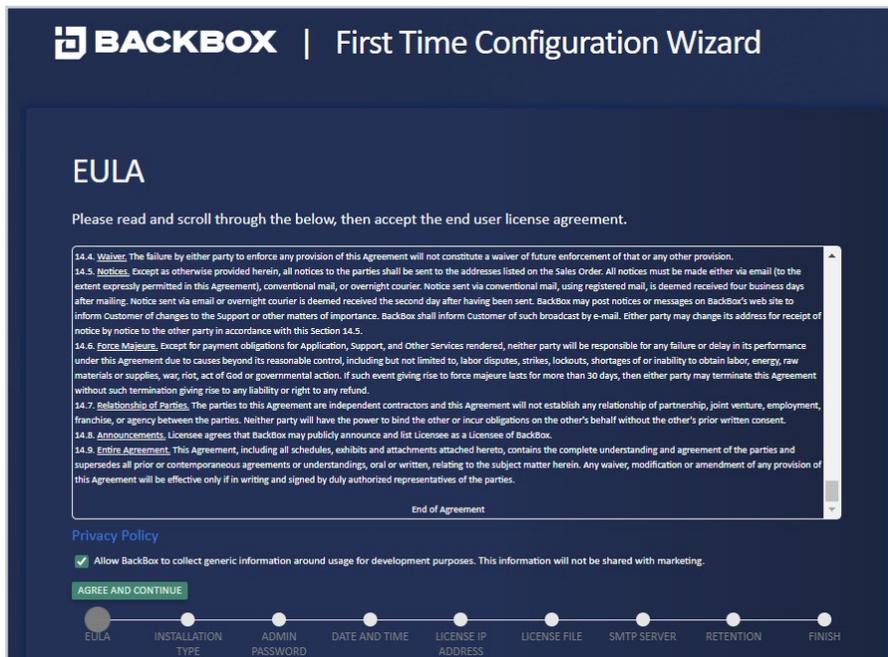
## Section 3 | RUN THE FIRST TIME WIZARD

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



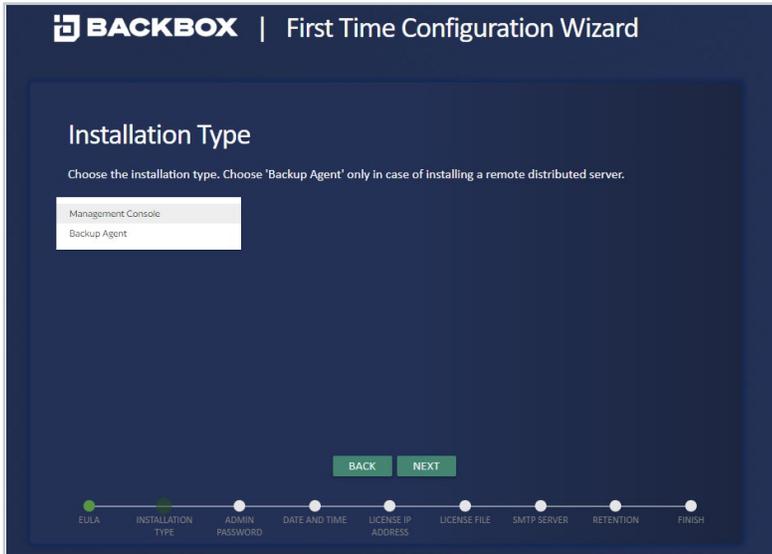
- 2 Enter the default BackBox Username and Password.
  - a. Username: **admin**
  - b. Password: **password**

**Note:** You will have the opportunity to change this password in the first-time wizard.
- 3 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..



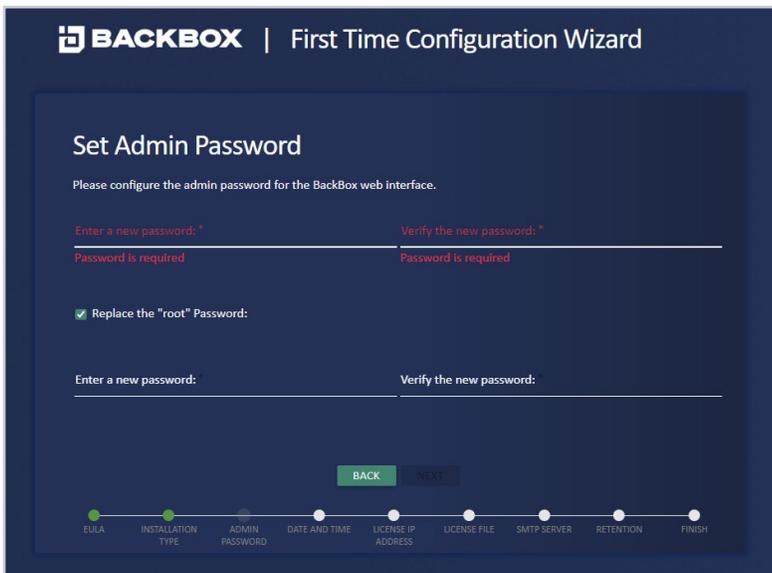
**4** You will need to select the Installation Type. This is where you choose between Management (main unit) or Agent (dependent unit). Agent units are only able to accept commands from a Management unit, so be sure you already have a Management unit before choosing Agent.

**5** Click **Next**.



**6** 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**



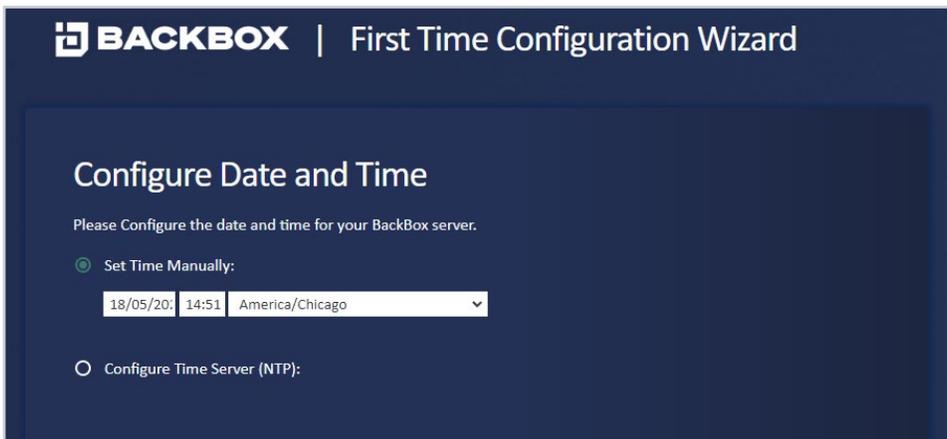
**7** Verify the BackBox IP matches the IP address you will use for configuring the license.



**8** Select the Create Demo License. This will create a 14-day Evaluation license.



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



- 10** 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.

The screenshot shows the 'Configure SMTP Server' step of the wizard. It includes a title bar with the BackBox logo and 'First Time Configuration Wizard'. The main heading is 'Configure SMTP Server'. Below it, a sub-heading reads 'Please configure the SMTP server that will be used to send e-mail alerts'. There are three input fields: 'Sender's email address' with the value 'sender@domain.com', 'SMTP server' with the value '1.2.3.4', and 'SMTP port' with the value '25'. At the bottom, there are 'BACK' and 'NEXT' buttons. A progress bar at the very bottom shows steps: EULA, INSTALLATION TYPE, ADMIN PASSWORD, DATE AND TIME, LICENSE IP ADDRESS, LICENSE FILE, SMTP SERVER (highlighted), RETENTION, and FINISH.

- 11** 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.

The screenshot shows the 'Configure Retention' step of the wizard. It includes a title bar with the BackBox logo and 'First Time Configuration Wizard'. The main heading is 'Configure Retention'. Below it, a sub-heading reads 'Choose the amount of backups that you want to keep for each device'. There is a single input field labeled 'Backup retention :' with the value '30' and a dropdown menu labeled 'Backups'. At the bottom, there are 'BACK' and 'NEXT' buttons. A progress bar at the very bottom shows steps: EULA, INSTALLATION TYPE, ADMIN PASSWORD, DATE AND TIME, LICENSE IP ADDRESS, LICENSE FILE, SMTP SERVER, RETENTION (highlighted), and FINISH.

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



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



## Section 4 | VERIFY THE INSTALLATION

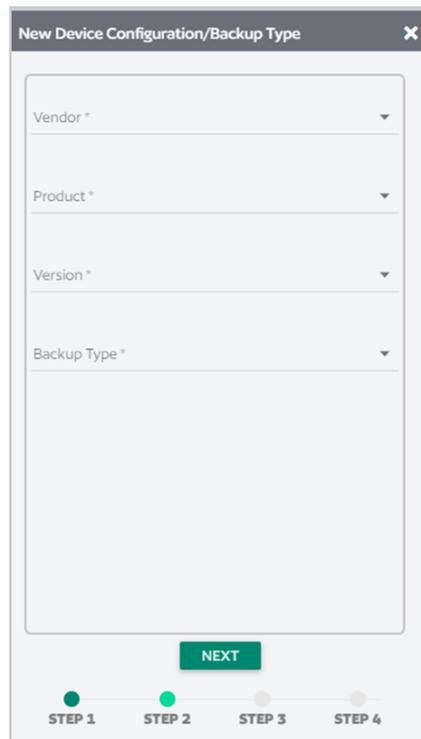
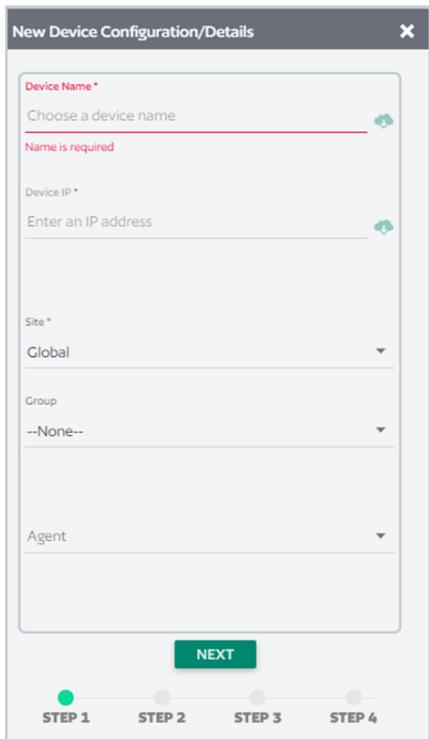
To ensure the installation was successful:

- 1 Ensure you can login with updated credentials.
- 2 Add a Device and Run a backup on a device to validate functionality.

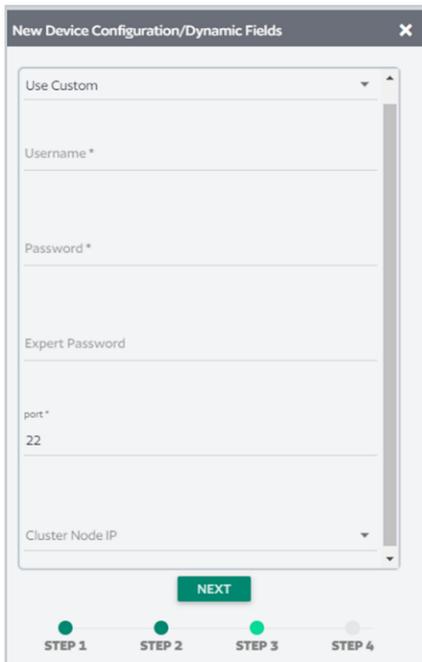
## Section 5 | ADD A DEVICE AND RUN A BACKUP

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

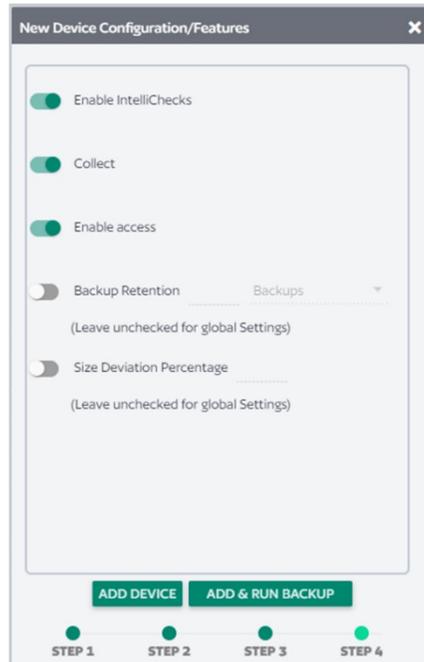
- 1 On the Devices screen, click the Add button. The New Device Configuration dialog box appears. Add the device name, the device IP address (and if you have created them, add the Group, Agent, and/or Site you wish to assign to the device), if not then leave Group and Agent blank and the Site set to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



**3** 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**.



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



**5** 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.

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

## 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](https://support.backbox.com)