virtru

Virtru End-User Enablement Playbook

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Welcome

Introducing your end users to Virtru and educating them on how to use it is a critical step in the deployment process, which is why we've created this End-User Enablement Playbook. We encourage you to use this resource as a guide to help you streamline the end-user rollout process and provide you with the tools needed to ensure you are successful. As always, our Support Team is happy to help troubleshoot any issues you may have and you can contact them here. Also, to ensure you're up-to-date on all things Virtru, visit our Customer Resource Library to view on-demand webinars, download helpful resources and subscribe to our monthly customer newsletter.

STEP #1:

Download the Onboarding Checklist

Whether you're just getting started with Virtru or in the midst of rolling out the plug-in to your end users, our Onboarding Checklist is there to ensure you're taking all of the necessary steps to smoothly roll out Virtru to your users and setting them up for long-term success. If you aren't familiar with this resource we recommend reviewing it before continuing on to the next step of this playbook.

Onboarding Resources:

Download the Onboarding Checklist

Watch the Webinar: Onboarding Checklist—Your Guide to Successfully Deploying Virtru

STEP #2:

Introduce Your End Users to Virtru and Invite Them to Install the Plug-in

Send the following email template to your end users who will be using the Virtru plug-in to protect emails and files.

After sharing this email with your end users, we recommend taking it one step further and scheduling a team training session over video to show them how easy it is to activate the plug-in and start using Virtru effectively.

Email Template for Your End Users:

Subject Line Options:

1. Welcome to Virtru: *YOUR COMPANY NAME'S* New Email Tool
2. Important: New Encryption Tool for Your Email
3. Our New Email/File Encryption Tool

Copy:

Hi Team,

I want to introduce you to Virtru, a new tool that we will be using to encrypt emails and attachments. As someone who is sharing sensitive information as part of your daily job, it's critical that you follow the steps below to complete activation of Virtru.

Who is Virtru?

Virtru is a leading email and file encryption provider that will help us protect sensitive information to ensure our organization stays safe and compliant with various regulations.

What are the benefits?

With Virtru, you're able to send and read encrypted messages and attachments without ever leaving your inbox—and without your recipients downloading any software or creating any passwords. In addition to its ease of use, it will also allow our organization to:

1. Meet compliance requirements and avoid potential penalties.
2. Reduce the risk of data breaches.
3. Have the freedom to collaborate with confidence and productively share data in the cloud.
4. Maintain control of our data, and see who's accessing and interacting with it.

[We recommend customizing the benefits section and sharing your organizational goals around data privacy and security with your end users].

Your Next Steps:

You will receive an invite to join our Virtru team in the next few days. Please start by accepting the invitation. Next, you will want to follow the instructions to download the appropriate plug-in from the Virtru website. Once the plug-in is downloaded on your machine, please follow these instructions to activate Virtru.

Additional Resources:

- Visit the Virtru for Users section of their Support Page to access detailed help articles.
- Learn how to Send a Virtru-Encrypted Email in Gmail **OR** Send a Virtru-Encrypted Email in Outlook.
- Use this email template to alert any recipients you share sensitive data with that you'll be using Virtru to send those emails.

Please let me know if you have any questions.

Thanks,
YOUR NAME

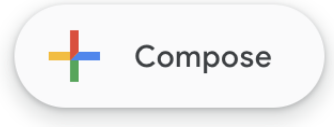
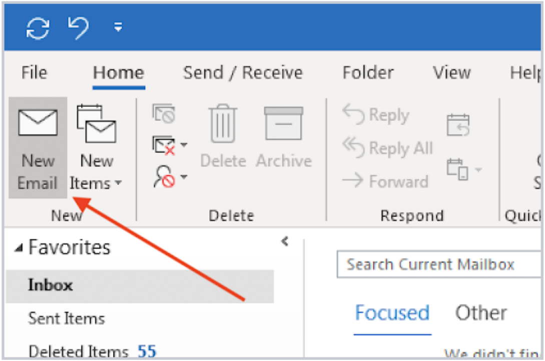
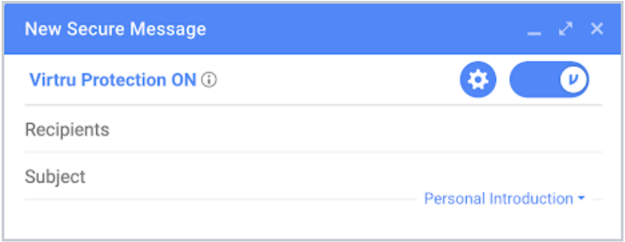
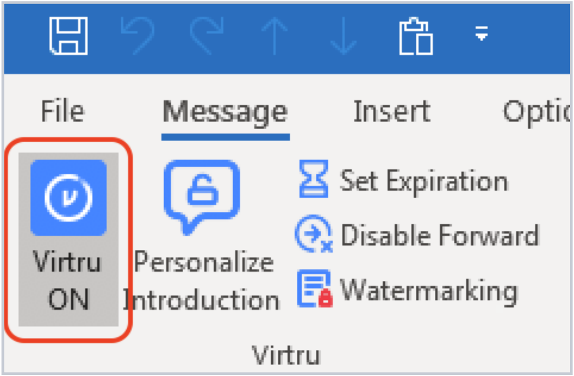
STEP #3: Educate Them On How and When to Use Virtru

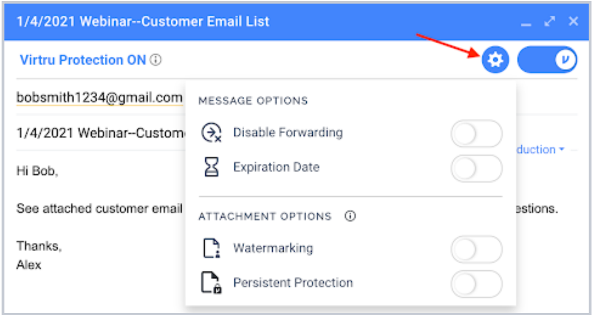
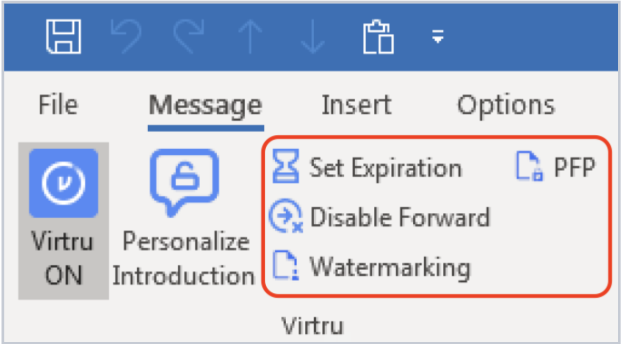
After your end users have installed and activated Virtru, it's important to educate them on how and when to use Virtru. To start, share these common use cases for end-to-end encryption within each department.

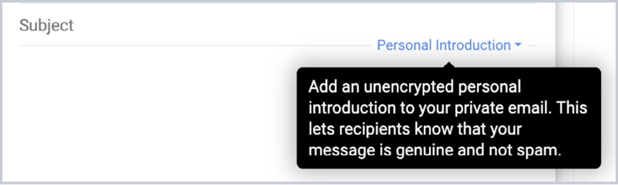
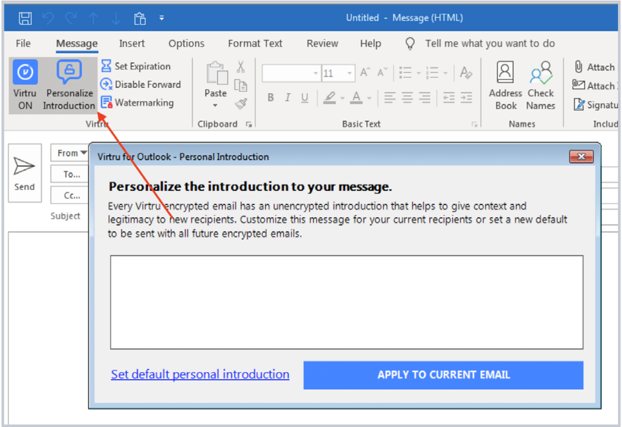
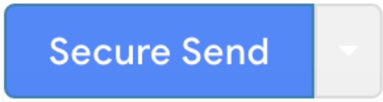
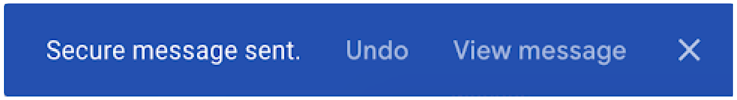
	Department									
	Executive	Information Technoloy	Human Resources/ Talent	Finance	Legal	Marketing	Sales/ Support	R&D/Content Creation	Supply Chain Manufacturing	Healthcare
Content Protected	Strategic Plans	Passwords	Sensitive Employee Communication	Payroll & Employee Data	Contracts	Competitive & Product Positioning	Custom Proposals & Pitch Decks	Sensitive IP	Supplier Information	Patient Health Files
	Board Communication	System Architecture	Legal Paperwork for Onboarding	Mergers & Acquisitions	Sensitive IP	Marketing Collateral	Competitive Advantages	Product Roadmap	Schematics / Engineering	Billing & Payment Details
	Mergers & Acquisitions	Security Vulnerabilities & Tests	Benefits Information	Budgets	Protected Communication	Marketing Campaigns / Launch Plans	Contracts & Financial Information	Research/ Script Development	Bill of Materials	Study and Research Data
	Sharing Sensitive Data with Employees	Vendor Information & Customer Accounts	Recruiting Process	Financial Reports/ Models/ Projections	Client/Vendor Communication	Market Research & Analysis	Customer Lists	Recipes & Formulas	Logistics	Patient Onboarding

Next, provide them with step-by-step instructions on how to turn Virtru ON and empower them to leverage the enhanced security features when sending an encrypted message. You can either resend the instructions you included in the email template above: [Send a Virtru-Encrypted Email in Gmail] / [Send a Virtru-Encrypted Email in Outlook] or share the visuals we've provided below:

Steps to Encrypt an Email/File

Gmail	Outlook
1. In Gmail, click Compose.  	1. In Outlook, click New Email.  File Home Send / Receive Folder View Help New Email New Items Delete Archive Reply Reply All Forward New Delete Respond Quick Favorites Inbox Sent Items Deleted Items 55 Search Current Mailbox Focused Other We didn't fin
2. You should see the Virtru bar at the top of the Compose window. If it is OFF, click the toggle to turn it ON.  New Secure Message Virtru Protection ON Recipients Subject Personal Introduction	2. Open the Message tab and click the Virtru button to turn Virtru ON.  File Message Insert Optic Virtru ON Personalize Introduction Set Expiration Disable Forward Watermarking Virtru

Gmail	Outlook
3. Add your recipients, subject, body of the email, and any relevant attachments. If you wish, you can select the gear icon to set additional security options for the message, including Disable Forwarding, setting an Expiration Date, and applying Watermarking and/or Persistent File Protection (PFP) to attachments.  1/4/2021 Webinar--Customer Email List Virtru Protection ON bobsmith1234@gmail.com 1/4/2021 Webinar--Custom Hi Bob, See attached customer email ... estions. Thanks, Alex MESSAGE OPTIONS Disable Forwarding Expiration Date ATTACHMENT OPTIONS Watermarking Persistent Protection duction	3. Add your recipients, subject, body of the email, and any relevant attachments. If you wish, you can select additional security options for the message, including Disable Forwarding, setting an Expiration Date, and applying Watermarking and/or Persistent File Protection (PFP) to attachments.  File Message Insert Options Virtru ON Personalize Introduction Set Expiration PFP Disable Forward Watermarking Virtru

Gmail	Outlook
4. You can also set a one-time, unencrypted personal introduction for the message to either introduce Virtru to new users or provide some context about the email. Just click Personal Introduction in your draft window and enter any content you wish to be delivered unencrypted.  Subject Personal Introduction Add an unencrypted personal introduction to your private email. This lets recipients know that your message is genuine and not spam.	4. You can also set a one-time, unencrypted personal introduction for the message to either introduce Virtru to new users or provide some context about the email. Just click Personal Introduction in your draft window.  Untitled - Message (HTML) File Message Insert Options Format Text Review Help Tell me what you want to do Virtru ON Personalize Introduction Set Expiration Disable Forward Watermarking Paste Clipboard Basic Text Address Book Check Names Names Send From To... Cc... Subject Virtru for Outlook - Personal Introduction **Personalize the introduction to your message.** Every Virtru encrypted email has an unencrypted introduction that helps to give context and legitimacy to new recipients. Customize this message for your current recipients or set a new default to be sent with all future encrypted emails. Set default personal introduction APPLY TO CURRENT EMAIL
5. Once your message is ready and applicable settings are in place, just click Secure Send.  Secure Send You will see a brief animation, then the message will encrypt and send.  Secure message sent. Undo View message	5. When your message is ready, click Send. You should see a brief animation letting you know that the message is Encrypting before it is fully sent.

Security Feature Deep Dive

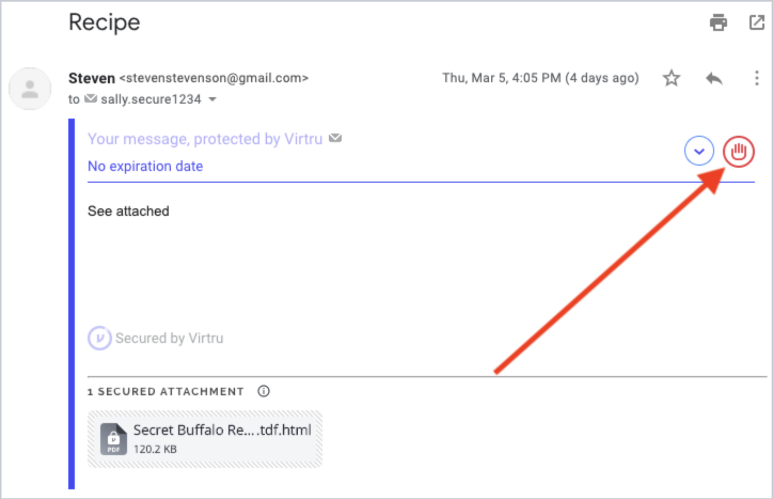
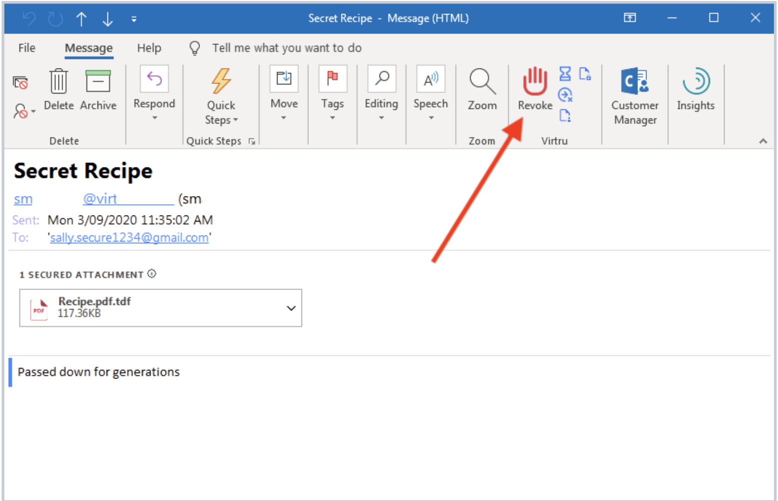
Now that your end users are familiar with how to turn Virtru ON and send an encrypted email, it's time to educate them on the functionality of each security feature. To start, you can either send them these helpful support articles that will walk them through each feature: Revoke Access, Disable Forwarding, Expiration Date, Watermarking, and Persistent File Protection (PFP) or share the visuals we've provided below:

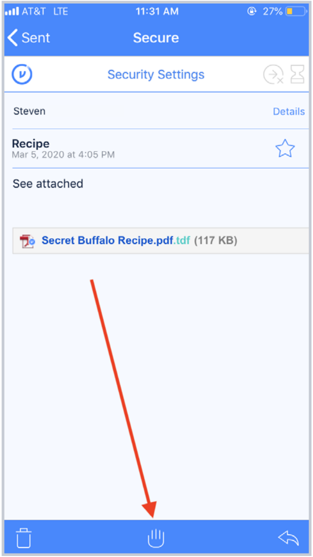
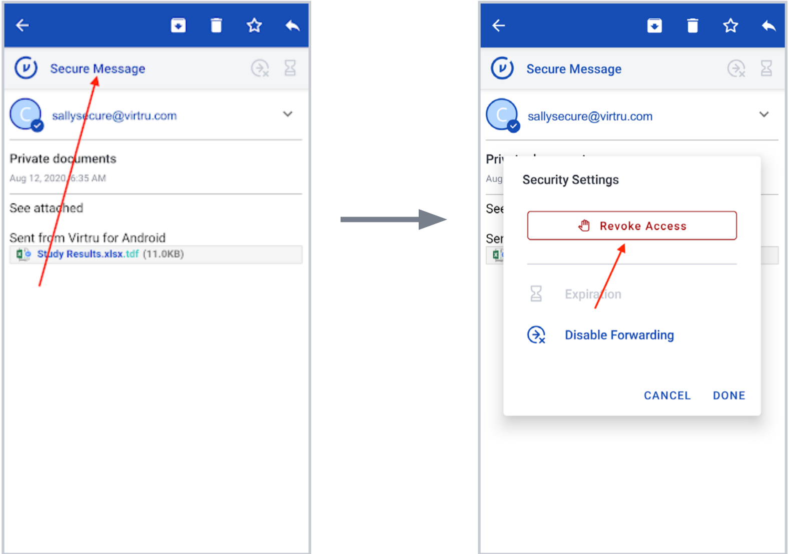
Security Option #1: Revoking an Encrypted Message

When a Virtru user sends encrypted content, they have full control over access to the message(s) and/or file(s). Even if a recipient receives encrypted content, the sender has the ability to revoke (or reauthorize) access at any time. Virtru even allows the sender to granularly revoke access to specific recipients.

Revoke an email AFTER it is sent:

1. To revoke an email, begin by opening the Virtru-secured message in your sent folder.
2. The revoke button is immediately visible in Gmail, Outlook and iOS. Click the Revoke hand icon to revoke access from all recipients.

Gmail	Outlook
 Recipe Steven <stevenstevenson@gmail.com> Thu, Mar 5, 4:05 PM (4 days ago) to sally.secure1234 Your message, protected by Virtru No expiration date See attached Secured by Virtru 1 SECURED ATTACHMENT Secret Buffalo Re….tdf.html 120.2 KB	 Secret Recipe - Message (HTML) File Message Help Tell me what you want to do Delete Archive Respond Quick Steps Move Tags Editing Speech Zoom Revoke Customer Manager Insights Delete Quick Steps Zoom Virtru Secret Recipe sm @virt (sm Sent: Mon 3/09/2020 11:35:02 AM To: 'sally.secure1234@gmail.com' 1 SECURED ATTACHMENT Recipe.pdf.tdf 117.36KB Passed down for generations

iOS	Android
	

Security Option #2: Disable Forwarding

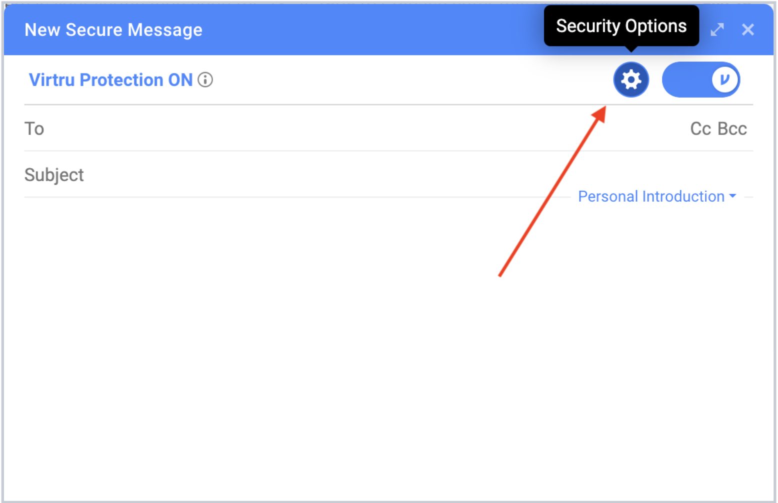
In addition to encrypting messages and attachments, Virtru users have the ability to apply additional security settings to protected content. Among these settings is the option to apply Disable Forwarding to an encrypted email.

If a Virtru plug-in user receives an encrypted message, they can use Virtru to forward the email to a new party. This will add the new recipient as an authorized user and allow them to unlock the message. Disable Forwarding, however, ensures that only your recipients have access to the encrypted content. So, if any of your recipients share the email with a new party, that new user will not be added as an authorized user and will not be able to unlock the message.

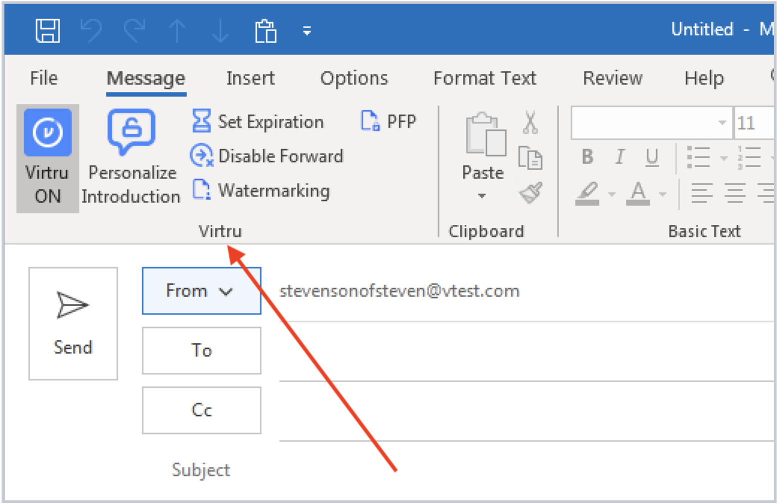
Disable forwarding BEFORE an email is sent:

1. Open a new draft and toggle Virtru ON.
2. Select Disable Forwarding from the menu.

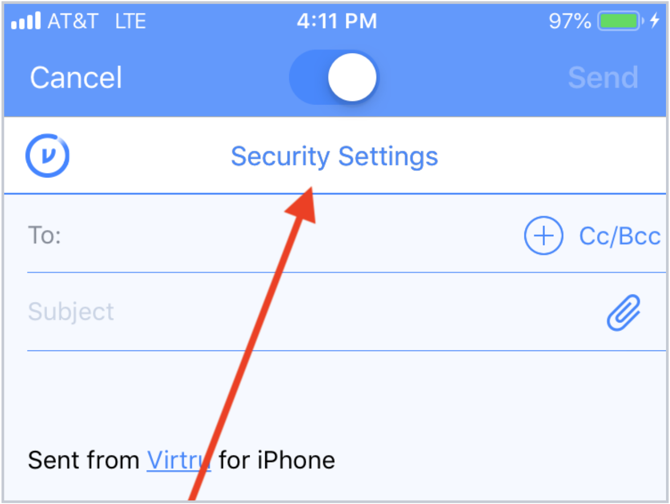
Gmail



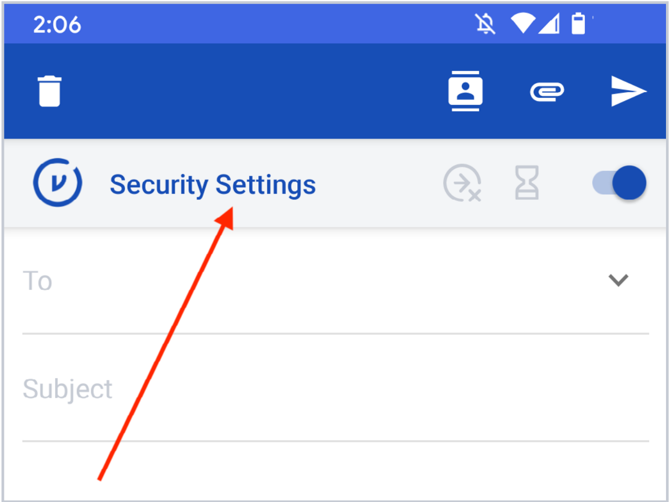
Outlook



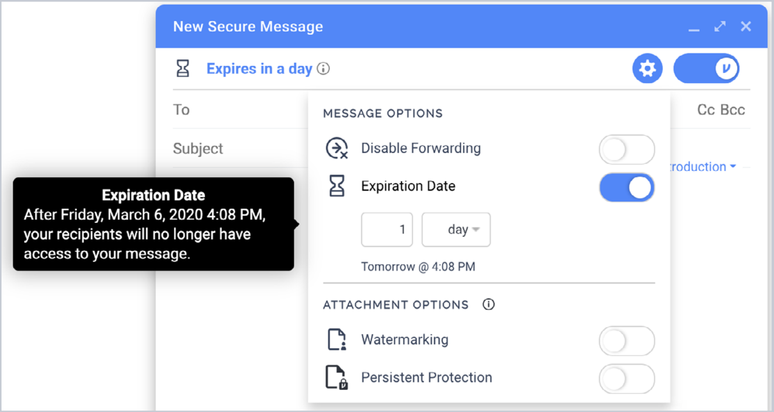
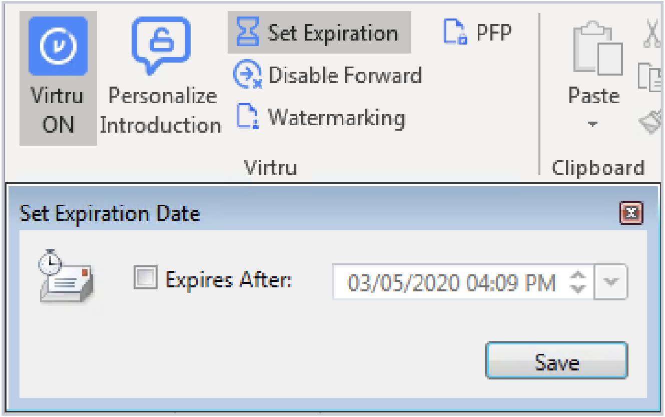
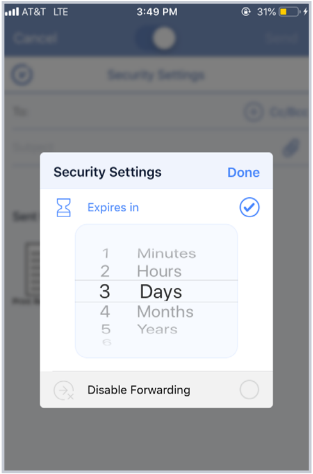
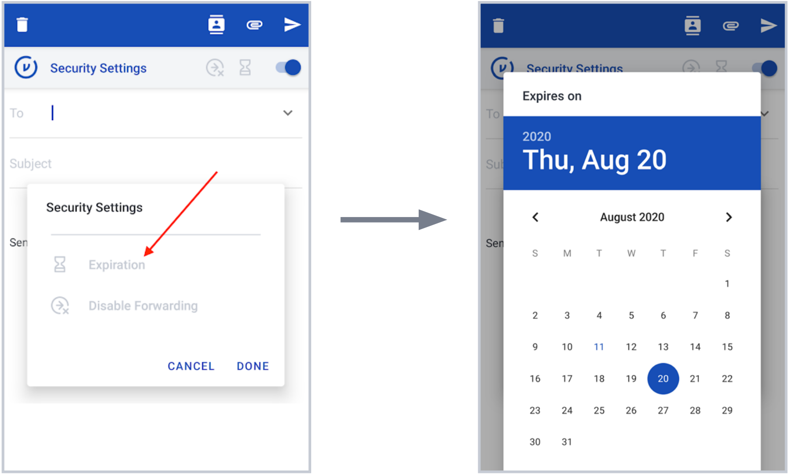
iOS



Android



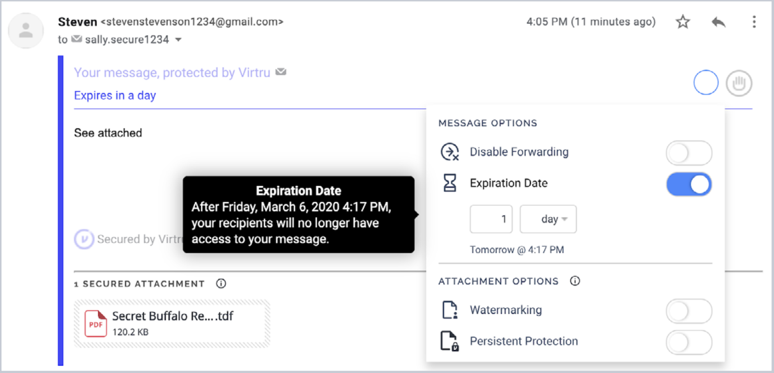
3. Select Expiration Date from the menu and configure the deadline.
4. Compose the rest of your message and Send.

Gmail	Outlook
 New Secure Message Expires in a day To Subject Cc Bcc MESSAGE OPTIONS Disable Forwarding Expiration Date 1 day Tomorrow @ 4:08 PM ATTACHMENT OPTIONS Watermarking Persistent Protection **Expiration Date** After Friday, March 6, 2020 4:08 PM, your recipients will no longer have access to your message.	 Virtru ON Personalize Introduction Set Expiration Disable Forward Watermarking PFP Virtru Paste Clipboard Set Expiration Date □ Expires After: 03/05/2020 04:09 PM Save
iOS	**Android**
 AT&T LTE 3:49 PM 31% Security Settings Done Expires in 1 Minutes 2 Hours 3 Days 4 Months 5 Years Disable Forwarding	 Security Settings To Subject Security Settings Expiration Disable Forwarding CANCEL DONE Expires on 2020 Thu, Aug 20 August 2020

Set an Expiration AFTER an email is sent:

1. With Virtru enabled, open the sent secure message and expand the Security Options/Settings menu. In Outlook, these settings will already appear in the ribbon.
2. Select Expiration Date and modify accordingly.

Gmail



Steven <stevenstevenson1234@gmail.com>
to sally.secure1234
4:05 PM (11 minutes ago)

Your message, protected by Virtru
Expires in a day

See attached

Secured by Virtru

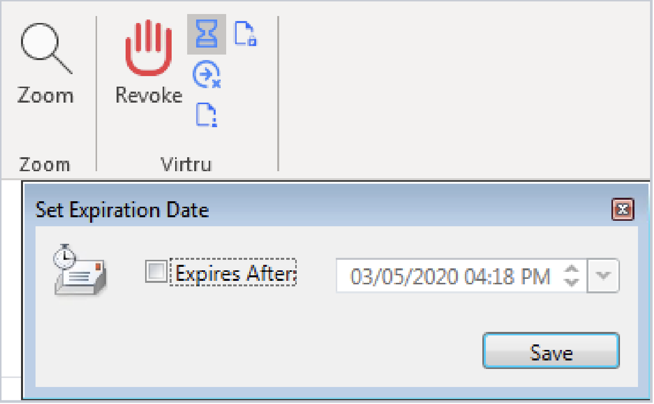
Expiration Date
After Friday, March 6, 2020 4:17 PM, your recipients will no longer have access to your message.

MESSAGE OPTIONS
Disable Forwarding ○
Expiration Date ●
1 day
Tomorrow @ 4:17 PM

ATTACHMENT OPTIONS
Watermarking ○
Persistent Protection ○

1 SECURED ATTACHMENT
Secret Buffalo Re....tdf
120.2 KB

Outlook

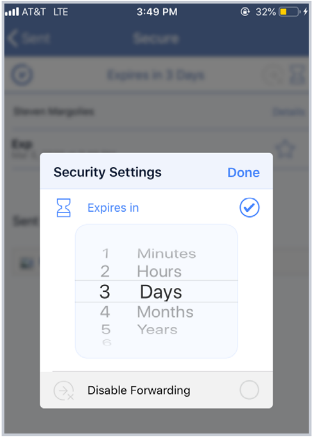


Set Expiration Date

□ Expires After: 03/05/2020 04:18 PM

Save

iOS



AT&T LTE 3:49 PM 32%

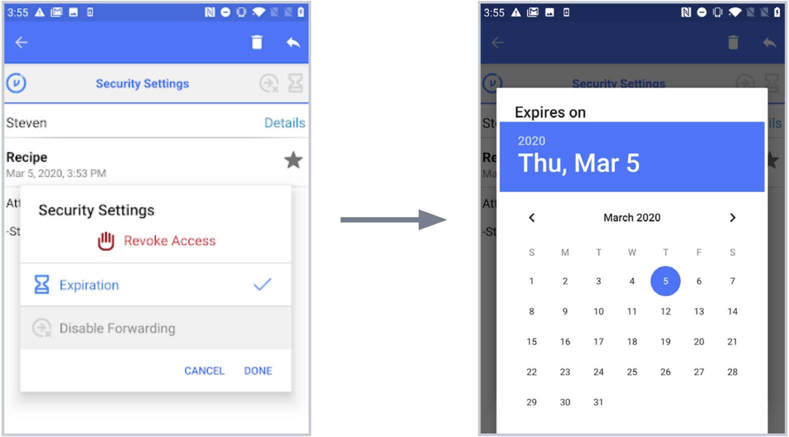
Security Settings Done

Expires in ✓

1 Minutes
2 Hours
3 Days
4 Months
5 Years

Disable Forwarding ○

Android



3:55

Security Settings

Steven Details

Recipe
Mar 5, 2020, 3:53 PM

Security Settings
Revoke Access
Expiration ✓
Disable Forwarding
CANCEL DONE

3:55

Expires on
2020
Thu, Mar 5

March 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

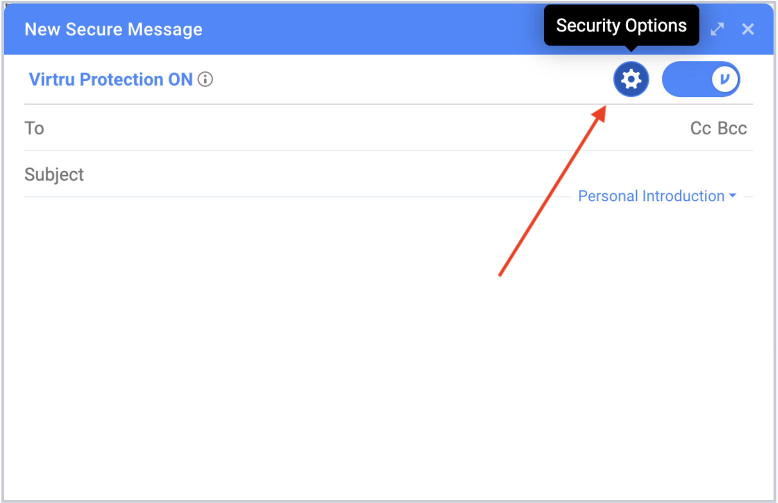
Security Option #4: Watermarking

If a Virtru recipient receives an encrypted file, they can preview the file in the Secure Reader and download a decrypted copy locally. When Watermarking is applied to a secure file, recipients will only have access in the Secure Reader and will see their email address watermarked across the document. The addition of the watermark is visible, but transparent enough to not obscure the contents of the file when viewed. Also, a recipient will not be able to download a local decrypted copy of the file.

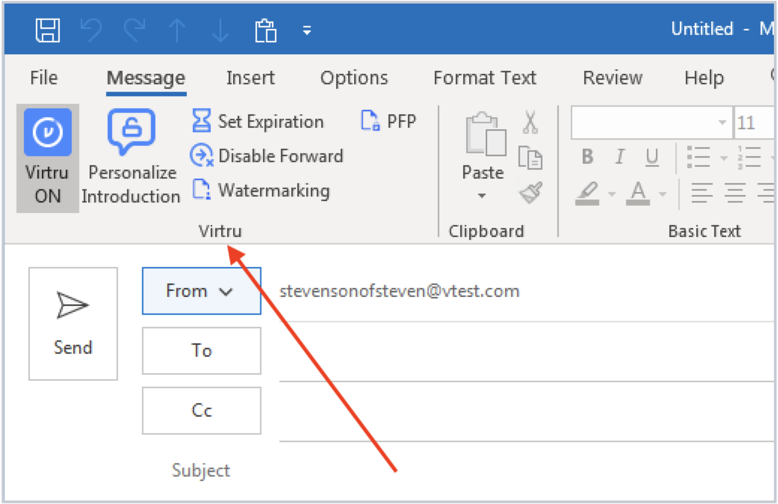
Watermarking BEFORE an email is sent:

1. Open a new draft and toggle Virtru ON.
2. If you are using Virtru for Gmail open the Security Options menu. Security options in Outlook are always visible in the ribbon.

Gmail

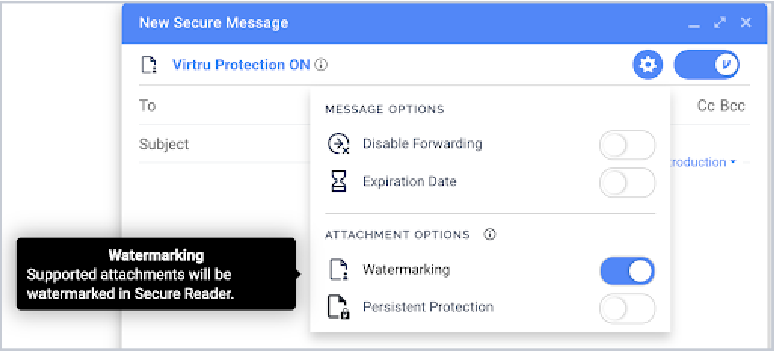
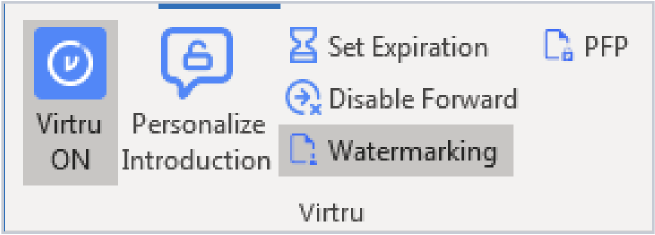


Outlook



From: stevensonofsteven@vtest.com

3. Select Watermarking from the menu.

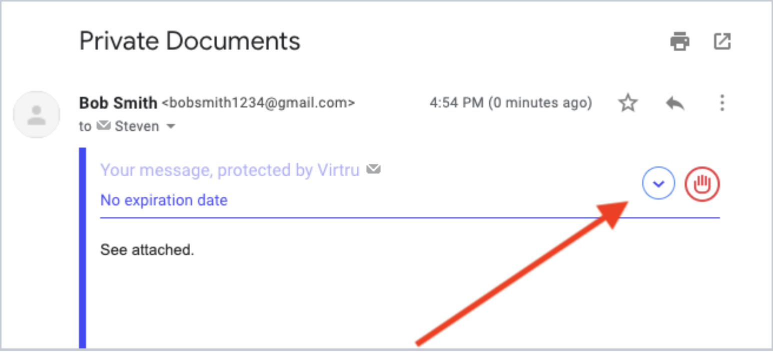
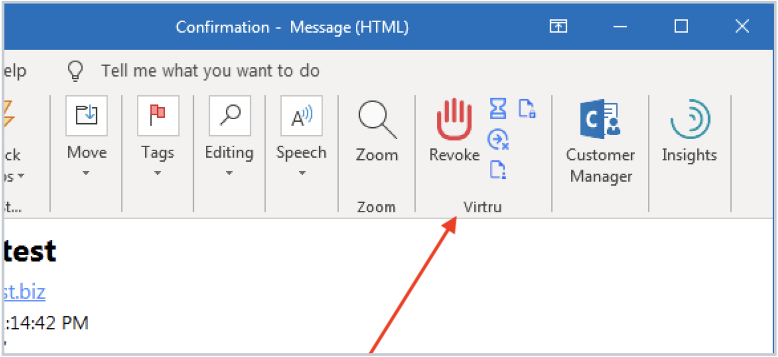
Gmail	Outlook
	

Watermarking
Supported attachments will be watermarked in Secure Reader.

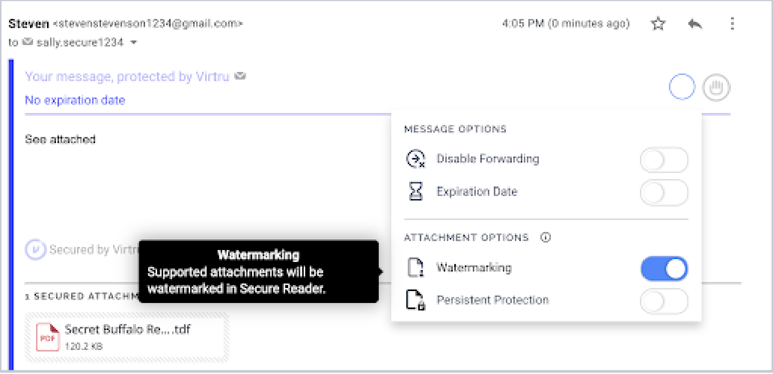
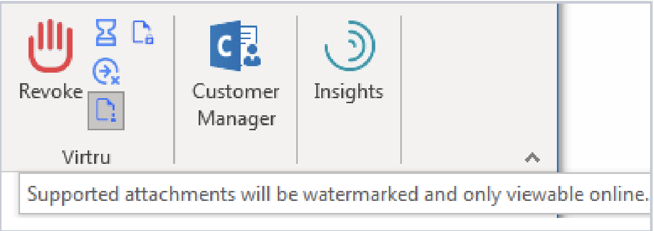
4. Compose the rest of your message and Send.

Watermarking AFTER an email is sent:

1. With Virtru enabled, open the sent secure message and expand the Security Options menu. In Outlook, these settings will already appear in the ribbon.

Gmail	Outlook
 Private Documents Bob Smith <bobsmith1234@gmail.com> 4:54 PM (0 minutes ago) to Steven Your message, protected by Virtru No expiration date See attached.	 Confirmation - Message (HTML) Tell me what you want to do Move Tags Editing Speech Zoom Revoke Customer Manager Insights Zoom Virtru test t.biz :14:42 PM

2. Select or deselect the Watermarking option.

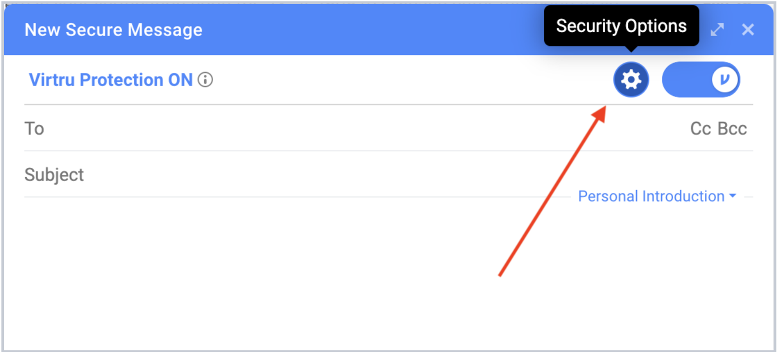
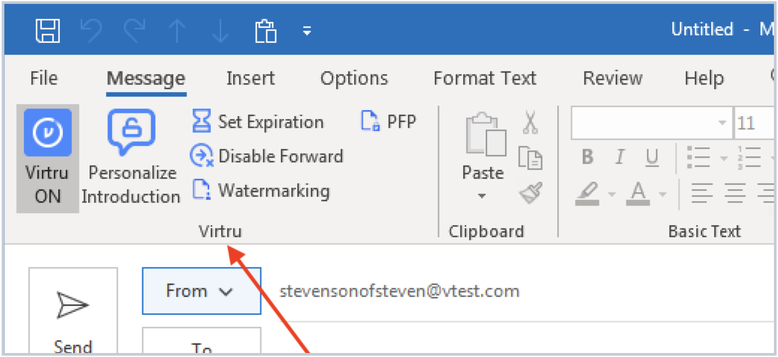
Gmail	Outlook
 Steven <stevenstevenson1234@gmail.com> 4:05 PM (0 minutes ago) to sally.secure1234 Your message, protected by Virtru No expiration date See attached MESSAGE OPTIONS Disable Forwarding ○ Expiration Date ○ ATTACHMENT OPTIONS Watermarking ● Persistent Protection ○ **Watermarking** Supported attachments will be watermarked in Secure Reader. Secured by Virtru 1 SECURED ATTACHM Secret Buffalo Re....tdf 120.2 KB	 Supported attachments will be watermarked and only viewable online.

Security Option #5: Persistent File Protection (PFP)

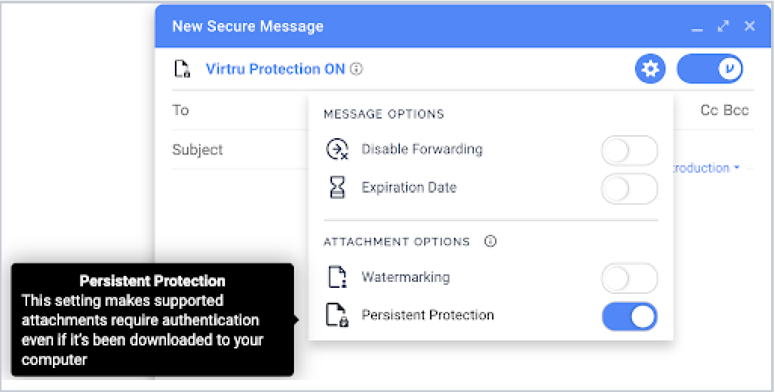
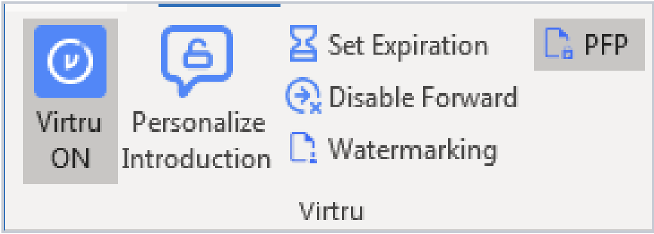
PFP provides a secure file container that is portable, universally accessible, and built on top of open standards. Regardless of where files are stored, PFP allows you to select, protect, and share a file with anyone while maintaining full visibility into how it is being used and retaining the ability to revoke access at any time. Any file protected with PFP will convert into the .tdf.html file format. This ensures that the contents are only accessible in Virtru's Secure Reader and only authorized parties can view it.

Enable PFP BEFORE an email is sent:

1. Open a new draft and toggle Virtru ON.
2. If you are using Virtru for Gmail open the Security Options menu. Security options in Outlook are always visible in the ribbon.

Gmail	Outlook
 New Secure Message Security Options Virtru Protection ON To Cc Bcc Subject Personal Introduction	 Untitled - M File Message Insert Options Format Text Review Help Virtru ON Personalize Introduction Set Expiration Disable Forward Watermarking PFP Virtru Paste Clipboard 11 B I U Basic Text Send From To stevensonofsteven@vtest.com

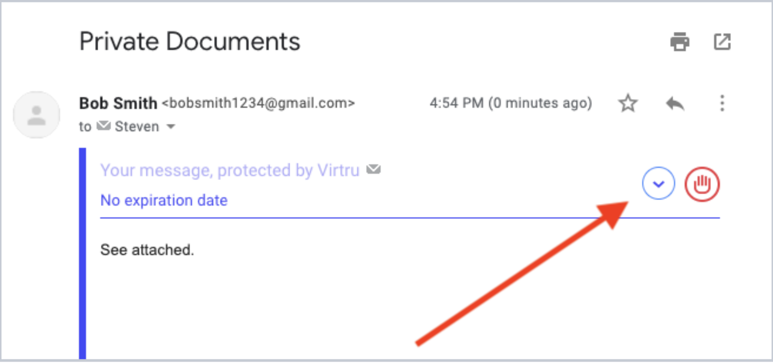
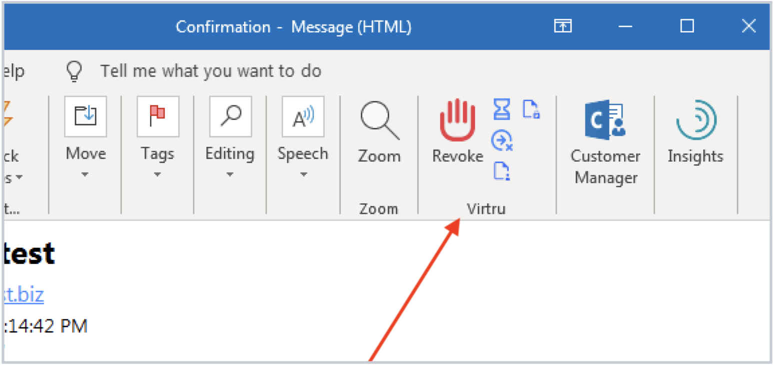
3. Select Persistent Protection from the menu.

Gmail	Outlook
 New Secure Message Virtru Protection ON To Subject Cc Bcc MESSAGE OPTIONS Disable Forwarding ○ Expiration Date ○ ATTACHMENT OPTIONS Watermarking ○ Persistent Protection ● **Persistent Protection** This setting makes supported attachments require authentication even if it's been downloaded to your computer	 Virtru ON Personalize Introduction Set Expiration Disable Forward Watermarking PFP Virtru

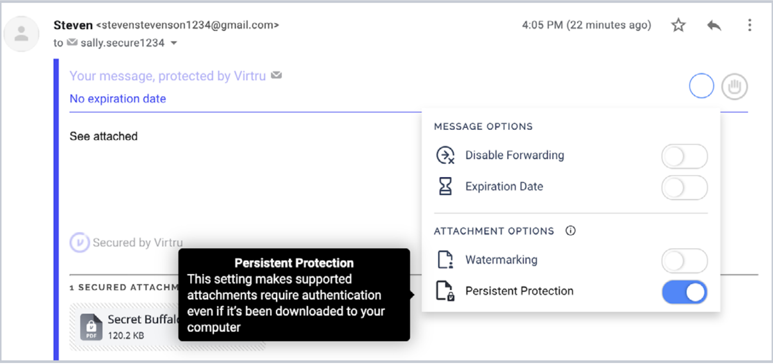
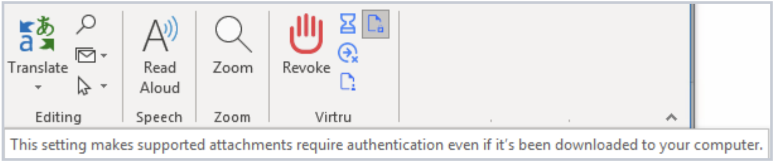
4. Compose the rest of your message and Send.

Enable PFP AFTER an email is sent:

1. With Virtru enabled, open the sent secure message and expand the Security Options menu. In Outlook, these settings will already appear in the ribbon.

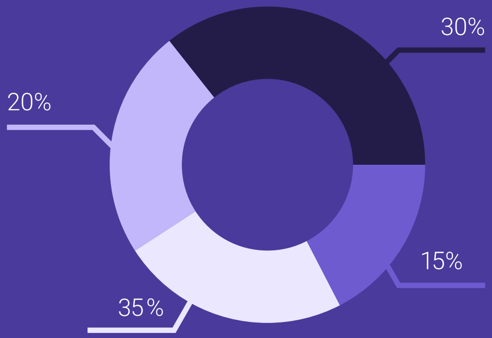
Gmail	Outlook
 Private Documents Bob Smith <bobsmith1234@gmail.com> 4:54 PM (0 minutes ago) to Steven Your message, protected by Virtru No expiration date See attached.	 Confirmation - Message (HTML) Tell me what you want to do elp ck s t... Move Tags Editing Speech Zoom Zoom Revoke Virtru Customer Manager Insights test t.biz :14:42 PM

2. Select or deselect the Persistent Protection option.

Gmail	Outlook
 Steven <stevenstevenson1234@gmail.com> 4:05 PM (22 minutes ago) to sally.secure1234 Your message, protected by Virtru No expiration date See attached Secured by Virtru 1 SECURED ATTACHM Secret Buffal 120.2 KB MESSAGE OPTIONS Disable Forwarding ☐ Expiration Date ☐ ATTACHMENT OPTIONS Watermarking ☐ Persistent Protection ☑ **Persistent Protection** This setting makes supported attachments require authentication even if it's been downloaded to your computer	 Translate Editing Read Aloud Speech Zoom Zoom Revoke Virtru This setting makes supported attachments require authentication even if it's been downloaded to your computer.

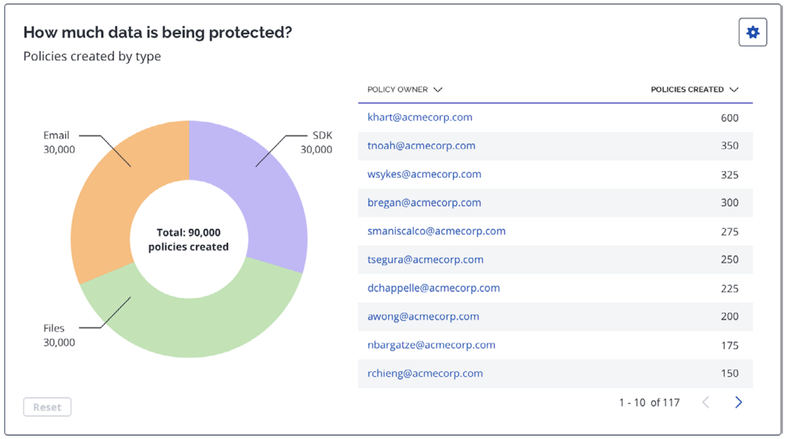
STEP #4:

Unlock Actionable Data Sharing Intelligence For Your Organization



As a Virtru Administrator, the Virtru Control Center is your one-stop shop to see what data your organization is protecting, know where it's going, manage who it's shared with, and maintain control of it at all times. Here's a brief look at the insights you have access to:

Understand the types of data your organization is sharing and how much of it is being protected



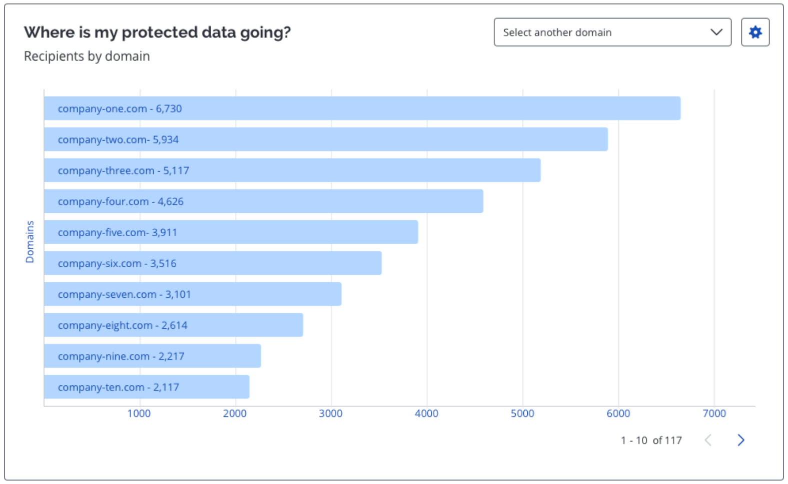
How much data is being protected?

Policies created by type

POLICY OWNER	POLICIES CREATED
khart@acmecorp.com	600
tnoah@acmecorp.com	350
wsykes@acmecorp.com	325
bregan@acmecorp.com	300
smaniscalco@acmecorp.com	275
tsegura@acmecorp.com	250
dchappelle@acmecorp.com	225
awong@acmecorp.com	200
nbargatze@acmecorp.com	175
rchieng@acmecorp.com	150

1 - 10 of 117

See who has access to your data



Where is my protected data going?

Recipients by domain

Select another domain

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Additional Resources:

[Access the Virtru Control Center]

[Download the Control Center Playbook]

STEP #5:

Invite Them to Install the Virtru Mobile App

Email Template for Your End Users:

Subject Line:

Access Virtru From Your Phone

Copy:

Did you know you can access secure emails right from your phone with a single tap? Download Virtru's mobile app to quickly access secure email messages and attachments on iOS or Android devices.

Virtru's app is designed to complement your existing mail app (Apple Mail, Gmail, Outlook, etc). When you receive a secure email and click "unlock message" in your existing mail app, the Virtru app will open and automatically decrypt your message. No additional verification or activation steps required.

It's that simple! Oh, and you can also send secure replies and create new secure messages directly in the app. Follow the links below to try it for yourself.

Download for iOS **Download for Android**

Please let me know if you have any questions.

Thanks,
YOUR NAME

Additional Resources:

Install, Activate, and Send Securely with Virtru for iOS

Install, Activate, and Send with Virtru for Android

STEP #6:

Create a Seamless Recipient Experience

As a Virtru customer, you're able to send and receive encrypted emails and files with ease. But what is the experience like for your recipients who don't have Virtru? Watch this webinar to learn best practices for creating a seamless Virtru experience and unlocking secure email exchanges with anyone, anywhere.

What You'll Learn:

- How recipients without Virtru access your secure emails and files.
- How certain security features can change the recipient experience and safeguard your data.
- Best practices for supporting your recipients.

Additional Resources for Recipients:

Read a Virtru Encrypted Email without Virtru Installed

Reply to a Virtru Encrypted Email without Virtru Installed

Viewing a secure file or attachment in Virtru's Secure Reader

In addition to these resources, you can also use the email template below to effectively communicate your rollout of Virtru to your recipients (i.e. a non-Virtru licensed external and internal user who your organization plans to send encrypted emails and/or files to).

While Virtru is designed to make it easy for your authorized recipients to access secure content, questions occasionally arise. That is why we recommend sending this email to anyone you plan to frequently send encrypted emails as it will help set expectations, improve their user experience, and reduce the number of questions.

Email Template for Recipients:

Subject Line: *YOUR COMPANY NAME's* New Email Tool

Copy:

Hi *YOUR RECIPIENT'S NAME*,

Some of the emails I'll be sending to you might look a little bit different going forward, and I want to let you know why.

We recently adopted Virtru here at *YOUR COMPANY'S NAME* to encrypt our emails and attachments. Virtru makes it easy for us to share sensitive information with you in a safe and compliant manner, and also for you to securely respond and add attachments without having to download any software.

Curious about what you will experience when you receive a Virtru-encrypted email? Watch this short video to see how you'll be able to easily read and reply to messages I send. *YOUR COMPANY'S NAME* has benefited from the easy protection Virtru provides, and I hope you will too.

Virtru's Support Page is also a useful resource if you have any questions along the way. They have a whole section devoted to reading and replying to secure emails and attachments.

Please reach out to me directly if you have any questions.

Thanks,
YOUR NAME

Summary

We hope this playbook provided you with the resources and tools needed to enable your end users. But that's not all. As a Virtru Administrator you have access to actionable data sharing intelligence via the Control Center and we recommend reviewing that data every few months in order to ensure your users are turning Virtru ON when sharing sensitive data.

As a reminder, our Support Team is always happy to answer your questions and provide additional help. Head over to our Support Center to browse how-to articles, submit a ticket, and more. Also, visit our Customer Resource Library to view on-demand webinars, detailed customer resources and subscribe to our monthly newsletter.