Onboarding Checklist

Week 1

	Tasks	Description	Additional Resources	
1	**Install Virtru** on **Your Computer**	Install and activate the Virtru email plugin.	Install & Activate Virtru for Gmail Install & Activate Virtru for Outlook	☐
2	**Start Protecting Your Data**	Follow these five steps to see how easy it is to start sending encrypted emails and files: 1. Open up a new email message, and toggle Virtru "On" 2. Write your email copy and add the appropriate recipients 3. Adjust the email security settings by clicking on the gear icon in the message window 4. Attach any files you want to encrypt 5. Hit send	Send a Virtru Encrypted Email in Gmail Send a Virtru Encrypted Email in Outlook	☐
3	**Invite Your End Users**	Invite your end users to install and activate the Virtru plugin.	Webinar: Best Practices for User and Account Management Email Template: Introducing Virtru to Your End Users	☐
4	**Empower Your End Users to Secure Their Data**	Educate your end users on the importance of securing their data and how Virtru can help.	Webinar: Best Practices for End-User Adoption and Success	☐
5	**Email Security Features**	Learn when and how to leverage each of Virtru's security features.	Webinar: Get the Most Value Out of Virtru's Security Features	☐

Week 2 & 3

	Tasks	Description	Additional Resources	
1	**Visit the Virtru Control Center**	See the types of data your organization is sharing, where your data is going and who it's being shared with—both at the company domain level and individual recipient level.	Discover Meaningful Insights About Your Data Control Center Playbook for Administrators	☐
2	**Confirm all end users have activated Virtru.**	Visit the Control Center to confirm all of your end users have installed Virtru. If not, send them a reminder to accept the invitation.	Reminding Users to Accept Invitations	☐
3	**Review Your Data Loss Prevention (DLP) Rules**	Leverage Virtru's DLP rule package to dictate how Virtru will behave when certain content is found in your end users' outgoing emails.	Manage Your Data Loss Prevention Rules	☐
4	**Create a Seamless Experience for Your Recipients**	Learn how to create a seamless experience for email recipients that don't have Virtru installed but still need to access the secure data you've shared with them.	Webinar: Best Practices for Creating a Seamless Virtru Experience for Your Recipients Notifying Your External Recipients	☐

Week 4

	Tasks	Description	Additional Resources	
1	**Complete the Onboarding Checklist**	Congratulations! You've completed each task and are fully deployed!	Visit our Support Site for additional resources or to submit a ticket.	☐
2	**OPTIONAL: Custom Data Loss Prevention (DLP) Rules** *If this will be part of your data security strategy, we recommend revisiting these rules on a quarterly basis to ensure your protection is up to date.*	Virtru provides a standard DLP rules package to all customers. If you need to go a step further, you're able to create custom DLP rules to fit specific compliance and/or organization needs.	Create Custom DLP Rules	☐

Should you need help or have any questions, please visit our Support Site to access detailed help articles and submit a ticket.