



You've taken the first step by choosing **OneTrust Privacy Operations** – now let's turn that choice into measurable impact!

We created a checklist to guide you through the essential setup steps, help you navigate myOneTrust, and connect you to the right resources. You can work through this at your own pace—use it to track progress and explore deeper tools and training along the way.

Basic Product Training, Setup, & Best Practices

Build confidence in navigating the OneTrust platform and leveraging structured onboarding resources.

□ Platform Orientation & Guided Learning

- Watch solution overview demos to understand OneTrust workflows
 - [Data Mapping Demo](#)
 - [Assessment Automation Demo](#)
- Watch webinars:
 - [Automating your Data & Activity Map](#)
- Review Module Step-by-Step Onboarding Guides
 - [Data Mapping](#)
 - [Assessment Automation](#)
- Access the entire knowledge base library:
 - [Data Mapping](#)
 - [Assessment Automation](#)
- Complete [First-Time Configuration Checklist](#)

□ Training & Certification

- Explore [OneTrust Hands-On Labs](#) for guided exercises
- Register for [Training & Certification programs](#)

□ Get Started with Data Mapping Automation: Build a live inventory of where personal data lives across your business.

- *Configure Attributes*
 - Add key fields to track things like purpose, region, or risk level for each system or process.
 - [Attributes](#) define the details you want to monitor across your data records.
- *Configure Personal Data*
 - List the types of people you collect data about and what data you collect.
 - This helps you understand and report on [personal data types](#) and sensitivity.
- *Create and Manage Assessments*
 - Send simple [questionnaires](#) to teams to gather missing details.
 - [Assessments](#) help you fill in inventory gaps directly from business owners.
- *Populate Inventory Records*
 - Quickly [populate your inventory](#) with systems, processes, and vendors using assessments, imports, integrations, or manual input.



- These records form the foundation of your privacy inventory.
- *Create Relationships Between Records*
 - Link related items—like a process and the system it runs on—to get a full picture.
 - **Relationships** show how people, systems, and data connect.
- **Get Started with Assessment Automation:** Easily launch privacy impact assessments to flag risks and meet regulatory expectations.
 - *Review & Select Templates*
 - Use **ready-made templates** for GDPR, CPRA, or internal reviews to save time.
 - Templates are prebuilt assessments with the right questions and structure.
 - *Customize Templates*
 - Tailor the assessment to your exact use case—add questions, hide irrelevant ones, and link records.
 - **Customizing** ensures the form fits your products, teams, and risk criteria.
 - *Configure Risk Settings*
 - Align privacy risk scoring to match your business model and tolerance levels.
 - **Risk settings** let you define what counts as low, medium, or high risk.
 - *Launch Assessments*
 - Send out assessments from your **inventory**, through a **portal**, or **directly in the platform**.
 - There are multiple easy ways to launch, depending on your workflow.
 - *Manage the Assessment Process*
 - Track progress, review responses, **flag risks**, and finalize results all in one place.
 - The platform helps you coordinate reviews across teams and ensure nothing slips through

Account Access & Setup

If you haven't already, start by accessing your platform, personalizing your profile, and exploring key resources that will support your journey.

- **Access & Initial Setup**
 - Review the **Getting Started with the OneTrust Platform** and **Welcome to myOneTrust** articles
 - Log in to your **OneTrust Platform** using your organization's URL
 - Complete **myOneTrust profile** setup
 - Set up **multi-factor authentication (MFA)**, if prompted
 - Customize **email notification preferences**
 - Understand the difference between OneTrust Platform vs. myOneTrust
- **Platform Navigation & User Settings**
 - Explore the **OneTrust Homepage** to review assigned tasks, announcements, and product access
 - Learn how to navigate using the **Application Launcher** and **Product Menus**
 - **Configure User Preferences** (e.g., language, date format, default org)



- Identify where to find [Global Settings](#), [Alert Center](#), and [Assigned Tasks](#)
- **myOneTrust & Self-Guided Support**
 - Use [OneTrust Copilot](#) to search support documentation or walkthroughs
 - Subscribe to helpful Knowledge Base articles for updates
 - Explore [myOneTrust Community Groups](#) to connect with peers and experts
 - Join relevant role-based or product-specific groups
- Visit the [Training & Certification Portal](#) for courses and webinars
 - Utilize this Admin Onboarding Checklist to track setup progress

Platform Settings & Configuration

Ensure your platform is configured to support team access, permissions, integrations, branding, and localization.

- **Platform Configuration**
 - Explore the OneTrust configuration [Best Practices](#)
 - Adjust general platform preferences in [Global Settings](#)
 - Confirm [organization structure and default settings](#) (Org name, IDs, hierarchy)
- **Organizations, Users & Roles**
 - Define [user roles and permission levels](#)
 - Use the [Role & Permission Matrix](#) to plan access
 - Configure Default or Custom User Roles
 - [Create and invite users](#) via the OneTrust Admin panel
 - Confirm that all users have the [correct visibility and privileges](#)
- **Access Management**
 - [Configure Single Sign-On \(SSO\)](#) or basic authentication
 - Enable [two-step verification \(2FA\)](#)
 - Adjust [session timeout settings](#) in accordance with security policy
 - Set platform-specific compliance and privacy access control
- **Integrations & API Setup**
 - Review systems requiring integration with OneTrust
 - Access the [Developer Portal](#) for API keys and documentation
 - Complete the [Integration Setup](#), if applicable
 - Test connection with supported third-party tools
- **Branding & Communication**
 - Upload logos, color palette, and brand elements
 - [Customize](#) system-generated email templates and notifications
 - [Configure SMTP](#) settings or external mail relay (if applicable)
- **Localization & Language**
 - Set the platform's default language and region
- Enable content translation and localization for users in other geos



Looking to dive deeper into the platform? Check out the [Advanced Product Training](#), [Advanced Customization](#), [Success Planning & Metrics](#), and the [Ongoing Enablement & Training](#) sections below!

Advanced Product Training

Dive deeper into platform features and strategic use cases to build confidence and operational maturity.

- **Deepen Platform Knowledge**
 - Enroll in Advanced [Certification Programs](#) relevant to your configuration
 - Attend [Live](#) or [On-Demand](#) Webinars that focus on advanced feature sets, real-world examples, and expert guidance
 - Join [Community Groups for Power Users & Admins](#)

Advanced Customization

Refine your setup by exploring advanced tools and configurations to support scalability, automation, and long-term success.

- **Hands-On Configuration**
 - Apply relevant templates and automation examples to optimize your environment
 - Participate in [OneTrust Hands-On Labs](#) to test advanced configurations in a risk-free sandbox
- **Copilot & Self-Service Support**
 - Practice using [OneTrust Copilot](#) to troubleshoot or configure advanced settings
- Use Copilot to surface recommended resources and workflows related to complex admin tasks

Success Planning & Metrics

Gain visibility into your team's adoption, usage trends, and overall onboarding progress.

- **Platform Adoption & Engagement**
- Monitor team adoption using the [myOneTrust Usage Dashboard](#)
- Review login activity, page views, and [engagement indicators](#) to evaluate onboarding effectiveness

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Ongoing Enablement & Training

Stay connected to product updates, learning opportunities, and support resources that help you continue growing with OneTrust.

□ Product Updates & Roadmap

- Learn about the [OneTrust release process](#)
- Review [product release notes](#) for the latest feature enhancements
- Explore the [OneTrust Roadmap](#) for upcoming innovations

□ Feedback & Innovation

- Submit feedback or feature requests through the [Idea Exchange](#)
- Vote or comment on ideas submitted by others
- Submit Knowledge Base article feedback directly on the article page

□ Community Engagement

- Join relevant [Community Groups](#) in myOneTrust
- Continue learning and growing through [Office Hours](#)

□ Ongoing Support

- Open a support case using the 'Get Help' option in myOneTrust
- Track existing cases through the [Support dashboard](#)