

veeam

Your Path to Protection with Veeam Data Cloud

Customer Onboarding Roadmap





Getting started with **Veeam Data Cloud** should feel clear, not complicated. This guide walks IT practitioners, cloud architects, and cloud engineers from setup to validated protection and operational readiness. It is designed for teams who manage configuration, protection, and recovery while giving IT leaders visibility into progress and risk reduction.

By the end of your onboarding process, you will have the data resilience your organization demands to keep your business running, all unified under one intuitive yet powerful SaaS platform.

PHASE 1 Foundation	PHASE 2 Get Protected	PHASE 3 Validate and Scale
M1: Get Access	M4: Complete Your First Successful Backup	M8: Validate Your Protection
M2: Establish Ownership	M5: Review Backup and Retention Settings	M9: Expand Your Coverage
M3: Connect Your First Workload	M6: Build Basic Monitoring Habits`	M10: Introduce Advance Capabilities Slowly

Roadmap at a Glance

Phase	Name	Focus
PHASE 1	Foundation	Get access, establish ownership, and connect your first workload.
PHASE 2	Get Protected	Complete your first backup, review the core settings, and verify your protection is working as expected the first time around.
PHASE 3	Validate and Scale	Build confidence in your setup, expand Veeam Data Cloud adoption thoughtfully, and prepare for steady-state operations.

What Success Looks Like After the Onboarding Process

Your team should be able to:

- Access and manage your environment confidently.
- Ensure your priority workloads are protected.
- Run and validate your first backup jobs.
- Establish a clear recovery workflow that is understood by everyone.
- Define roles, ownership, and review routines.
- Plan where you want to expand next.
- Know where you can go to for assistance.



How to Use This Guide

Each milestone builds on the previous one, so it's recommended that you follow the steps in order at your own pace.



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PHASE 1

Foundation

Goal: Get access, establish ownership, and connect your first workload.

Your first month with Veeam Data Cloud is about building a clean foundation. Don't overcomplicate things: Focus on access, roles, and getting your first protection path in place.

For user guide and setup documentation go [here](#).

Milestone 1: Get Access

1. Confirm You Can Access Veeam Data Cloud

Before you get started, make sure the right people can get into Veeam Data Cloud and access the correct organization.

Start here:

- Confirm your **Veeam Data Cloud** subscription is active.
- Accept the invitation to your organization.
- Sign in at cloud.veeam.com
- Choose the correct organization if you belong to more than one.
- Review and accept the terms and conditions.
- Confirm that the initial admin has the right level of access.

The first user in a new Veeam Data Cloud organization is automatically assigned the **Organization Admin** role, which allows them to manage users and perform configuration actions.

Depending on the workload you are onboarding, additional setup steps may be required.

For **Veeam Data Cloud for Salesforce** you will also need to download two plugins:

[Download the External Client App](#) so Veeam Data Cloud can connect to Salesforce. This is an additional security feature to help protect your environment. To allow Salesforce end users the ability to un-archive their own data, download our Salesforce Extension.

For **Veeam Intelligence**, you will need to [agree to the opt-in message that pops up](#).





Milestone 2: Establish Ownership

Define Ownership Early

A smoother onboarding experience starts with clear responsibility, so make sure you and your team aligns on:

- Who owns platform administration.
- Who manages backup and recovery tasks.
- Who needs visibility into protection status.
- Who signs off on policy and retention decisions.

You do not need to do a big governance exercise here; just establish enough clarity so you have a baseline to keep work moving.

Assign the Right Roles

Role-based access control (RBAC) helps you move faster without losing control. For this step, focus on:

- Limiting elevated permissions to the smallest practical group.
- Giving operators the access they need to do their jobs, but nothing more to remain as secure as possible.
- Separating administrative ownership from broader visibility where appropriate.

Milestone 3: Connect Your First Workload






The fastest way to start seeing value is to protect something real. So, your priorities in this step include:

- Choosing the first workload you want to protect.
- Validating prerequisites.
- Connecting your environment.
- Confirming your service can discover the data you expect to back up.

Checkpoint

For many customers, this is the moment the onboarding project will start shifting from setup to making progress.

By the **end of Phase 1**, you should have:

-  Access confirmed.
-  Initial admin ownership established.
-  Core roles assigned.
-  Your first workload connected.
-  Product documentation and setup resources bookmarked for the team.



PHASE 2

Get Protected

Goal: Complete your first backup, review the core settings, and verify your protection is working as expected the first time around.

Now that your environment is connected, let's shift focus from setting things up to proving recovery and resilience. This is where you and your team will start seeing the true value of Veeam Data Cloud.

Milestone 4: Complete Your First Successful Backup

Backups in Veeam Data Cloud

Your first successful backup is definitely a milestone! It shows your environment is configured, connected, and actively protecting your organization's data.

At this stage, focus on:

- Starting protection for your selected workload.
- Confirming your backups were successfully completed.
- Reviewing warnings or failed items as they pop up.
- Verifying that your protected objects match your expectations.

Keep your scope practical at this point. Right now, you're proving the validity of a mode, not solving every issue at once.

Milestone 5: Review Backup and Retention Settings

Once protection is running, make sure your configuration aligns with how your team actually operates day to day.

For this step, focus on:

- Establishing your backup policy settings.
- Making retention choices.
- Establishing coverage for key users, sites, or services.
- The features you have available based on your subscription plan.

This is where your first backup job starts turning into the foundation for operational protection.





Milestone 6: Build Basic Monitoring Habits

You do not need to establish a heavy process quite yet. Rather, this step is dedicated to creating visibility into your environment.

You can start setting a rhythm for this by:

- Reviewing your backup status regularly.
- Checking dashboards and activity views.
- Making sure the right people know where to look for issues.
- Establishing a lightweight cadence for health checks.

Confidence comes from knowing what's happening throughout your environment, not just assuming things are going well.

Milestone 7: Fully Understand Your Recovery Options

In this phase, make sure your team can:

- Identify the available restore options.
- Understand who can perform restores.
- Walk through a basic recovery scenario.
- Document the first recovery workflow. You do not need a full-scale recovery exercise yet, but you should know how recovery works before you need it.

Checkpoint

By the end of **Phase 2**, you should have:

- ✓ All your backups are set up correctly and completed successfully. Core policy and retention settings are also reviewed.
- ✓ Basic monitoring routines are in place.
- ✓ A simple recovery workflow is established and understood by the team.
- ✓ You've established early confidence that Veeam Data Cloud protection is working.



PHASE 3

Validate and Get Ready to Scale

Goal: Complete your first backup, review the core settings, and verify your protection is working as expected the first time around.

By this point, the basics should be working. Now it's time to validate, refine, and decide what comes next for your organization.

Milestone 8: Validate That Your Protection Matched Your Expectations

This is the right time to pause and ask yourself a few direct questions:

- Are all the workloads protected?
- Are backups completing consistently?
- Are roles and ownership still clear, especially after testing?
- Are there gaps in visibility, retention, or recovery readiness?

This check matters. It's how teams move from just configuring their data protection environment to trusting it fully.

Milestone 9: Expand Your Coverage Where It Makes Sense

Once your first workload is stable, identify your next logical priority. This could look like adding additional users, expanding workload coverage, establishing more complete policy application, or working on growing stronger alignment across teams that share responsibility for protection and recovery.

Scale should follow proof. Start with what matters most, then expand with confidence.





Milestone 10: Introduce Advanced Capabilities Slowly

This is the time to make sure you and your team understand what's possible going forward after setting up and establishing your Veeam Data Cloud Environment.

Depending on your Veeam Data Cloud service and plan, the next stage may include:





- Broader workload protection.
- Additional AI capabilities.
- Stronger resilience strategies that are better aligned to your business requirements.

The goal here is simple: know what's available to you and decide what deserves your attention next.

Checkpoint

Good onboarding should leave you with a system your team can run confidently going forward.

By the end of Phase 3, you should have:

-  Confidence in your initial setup.
-  Verified protection for all workloads.
-  Clear operational ownership.
-  A repeatable review routine.



Quick Checklist

Immediate Actions:

- Confirm your **Veeam Data Cloud** subscription is active.
- Accept the invitation to your organization.
- Sign in at cloud.veeam.com.
- Confirm initial admin ownership.
- Identify who will manage backups and recovery.
- Connect your first workload.

By Phase 1:

- Assign user roles.
- Complete initial configuration.
- Validate readiness for first backup.
- Share key setup resources with the team.

By Phase 2:

- All your data should be successfully backed up.
- Review policy and retention settings.
- Establish basic monitoring habits.
- Understand restore options and responsibilities and make sure it aligns with your compliance needs.

By Phase 3:

- Validate that your protection aligns with requirements.
- Expand coverage where needed.
- Establish steady-state operational reviews.
- Identify the next capabilities you might want to adopt.



A Note for IT Leaders

In the first three phases, your path to success doesn't end at getting your platform live.

Success means all your data is protected, your backup health is visible, recovery processes and policies are understood, and ownership is clear. This results in less uncertainty, less operational friction, and more confidence that your team can protect what matters most and recover when needed.

Once you have the basics established, you can truly unleash the full potential of Veeam Data Cloud and see how we can be a partner with you in data protection.



Appendix: Quick Reference

As your environment evolves, these resources support your team across setup, validation, and ongoing operations.

Access and Account Management:

- [Create a Veeam Account](#): Set up access to get started.
- [My Account](#): Manage users, access, subscriptions, and more.
- [Veeam Data Cloud System Status](#): Service availability and uptime.

Product Guidance and Configuration:

- [Veeam Help Center](#): User guides and setup documentation.

Training & Enablement:

- [Veeam University](#): Self-paced onboarding and professional training.
- [Onboarding Webinars](#): Live, expert-led onboarding sessions.

Troubleshooting and Support:

- [Knowledge Base](#): Troubleshooting and best practices.
- [Community Hub](#) and [R&D Forums](#): Peer support and discussions.
- [Create a Support Case](#): Submit and manage your support requests.

Stay up to Date:

- [Veeam Data Cloud Changelog](#): Product updates and changes.
- [Resource Library](#): Solution-based resources and industry reports.
- If your team is onboarding multiple services, it's worth documenting your internal ownership model early, so each group knows what it owns and how success will be measured.

➔ [Sign in to Veeam Data Cloud](#) and begin protecting your first workload.



About Veeam Software

Veeam is the Data and AI Trust Company, specializing in helping organizations ensure their data and AI are fully understood, secured, and resilient to enable the acceleration of safe AI at scale. As the market leader in both data resilience and data security posture management, Veeam is built for the convergence of identity, data, security, and AI risk.

Headquartered in Seattle, with offices in more than 30 countries, Veeam protects over 550,000 customers worldwide, including 82% of the Fortune 500,

Learn more at www.veeam.com or follow Veeam on LinkedIn [@veeam-software](#) and X [@veeam](#).