Archive SharePoint Documents – Checklist

Download Your Checklist!
By the end of this article, you'll have a checklist that helps you prepare, move, and manage archived SharePoint documents while maintaining compliance and easy access.

1. Identify Documents for Archiving

- Use reports to find old/inactive files
- Confirm with content owners

2. Define Archive Policy

- Decide archive rules (age, activity)
- Align with retention policies

3. Prepare Metadata & Permissions

- Ensure metadata stays intact
- Preserve permissions if needed

4. Select Archive Location

- Choose dedicated archive library/site
- Apply access restrictions

5. Move or Copy Documents

- Move or copy using Migration tool, Power Automate, or manually

6. Preserve Folder Structure

- Keep folder hierarchy for easy navigation

7. Communicate with Users

- Notify users about new archive location
- Provide search guidance

8. Monitor & Review Archive

- Check archive regularly
- Validate compliance & adjust policy

Why This Checklist Matters:
Use this checklist to ensure documents are archived securely, remain accessible when needed, and support compliance with your organization's governance policies.