



## SharePoint Archiving Tools – Checklist

### Download Your Checklist!

By the end of this article, you'll be able to download a checklist to help you choose, configure, and use archiving tools in SharePoint that match your needs and compliance requirements.

#### 1. Assess Archiving Requirements

- Define retention & compliance needs
- Identify performance goals

#### 2. Evaluate Built-in vs Third-Party Tools

- Compare native SharePoint archiving
- Assess third-party vendors

#### 3. Check Compliance Features

- Look for eDiscovery, audit trails
- Ensure legal hold options

#### 4. Plan Integration with Existing Workflows

- Verify compatibility with Power Automate, Teams, Outlook

#### 5. Configure Storage Locations

- Choose archive libraries/sites
- Ensure secure access controls

#### 6. Test Archiving Scenarios

- Run pilot projects
- Validate archiving accuracy

#### 7. Train Admins & Users

- Provide admin & user guidance
- Share best practices

#### 8. Monitor & Optimize

- Monitor reports & logs
- Adjust tool configurations

### Why This Checklist Matters:

Use this checklist to ensure your archive tool works seamlessly, preserves necessary data, reduces clutter, and aligns with your governance policies.