



SharePoint Content Organizer Archive – Checklist

Download Your Checklist!

By the end of this article, you'll have a checklist that helps you configure the SharePoint Content Organizer, define metadata flags, and set up routing rules to automate your archival process.

1. Enable Content Organizer Feature

- Activate in Site Settings
- Ensure permissions are set

2. Create Drop-Off Library

- Create Drop-Off Library
- Make it visible to users

3. Define Metadata & Content Types

- Define metadata fields
- Align with archive policies

4. Configure Routing Rules

- Create routing rules
- Map metadata to destinations

5. Test Document Submission

- Upload test docs
- Verify correct routing

6. Train Users to Apply Metadata

- Educate users on tagging
- Provide guidance docs

7. Monitor Routing Reports

- Review logs & reports
- Check misrouted files

8. Maintain & Update Rules

- Update rules for new content
- Adjust metadata as needed

Why This Checklist Matters:

Use this checklist to reduce manual sorting, maintain consistency, and ensure your documents are routed correctly and archived efficiently.