



Quarterly SharePoint Site Access Review Checklist

A step-by-step framework to reduce permission sprawl, secure sensitive data, and maintain Microsoft Copilot readiness.

Phase 1: Baseline & Ownership Validation

- **Verify Site Ownership:** Confirm every SharePoint site and document library has at least two active, named business owners.
- **Identify Data Sensitivity:** Ensure appropriate sensitivity labels (e.g., Confidential, Internal, Public) are applied to the site or its core document libraries.
- **Review Site Purpose:** Confirm the site or Teams channel is still actively used. If dormant for over 90 days, schedule for archival or deletion.

Phase 2: High-Risk Exposure Clean-Up

- **Check "Everyone" Groups:** Scan for and remove broad access groups like "Everyone" or "Everyone except external users" from sensitive directories.
- **Audit Guest Access:** Export the list of external users/guests. Revoke access for guests whose vendor contracts have ended or who haven't logged in recently.
- **Review Anonymous Links:** Identify and disable any active "Anyone with the link" sharing URLs containing internal company data.

Phase 3: Structural Permission Hygiene

- **Enforce Group-Based Access:** Identify users who have been granted direct, individual permissions to files or folders and move them into appropriate Active Directory or Microsoft 365 groups (RBAC).
- **Investigate Broken Inheritance:** Map libraries or folders with unique permissions (broken inheritance) and verify if the exception is strictly necessary for business operations.



- **Remove Orphaned Users:** Ensure employees who have switched departments or left the company have been entirely purged from legacy SharePoint security groups.

Phase 4: Documentation & Sign-Off

- **Generate Governance Report:** Export the current state of permissions using native SharePoint Premium tools or third-party solutions like Varonis.
- **Owner Attestation:** Require the named business owner to formally sign off, confirming the current access list is accurate and justified.
- **Schedule Next Review:** Set a calendar anchor for the next quarterly audit (or bi-annual for low-risk collaboration spaces).