



# SharePoint Modern Site Architecture & Security Checklist

Use this checklist during the planning or auditing phase of any team or communication site to ensure optimal governance and user adoption.

## Phase 1: Information Architecture & Navigation

- **Flat Hierarchy Check:** The workspace is created as an independent site collection. (No new nested subsites are created).
- **Hub Connectivity:** The site is associated with the correct organizational Hub Site to inherit global navigation and themes.
- **Clear Naming Conventions:** The site and associated Microsoft 365 Groups use explicit, business-role names without confusing internal codes.
- **Mobile-First Validation:** Layouts use modern responsive web parts and look clear on the Microsoft Viva Connections mobile app.

## Phase 2: Content & Metadata Management

- **Optimized Libraries:** Document libraries have custom metadata columns created to reduce reliance on nested folder structures.
- **Version Control Baseline:** Version history limits are set according to organizational compliance or SharePoint defaults (Minimum 100-500 versions).
- **AI-Ready Scaffolding:** Required metadata fields are marked as mandatory to ensure accurate data extraction by Microsoft Copilot and SharePoint Premium.
- **Loop Component Integration:** Dynamic data tables are used in place of static Excel documents for cross-app collaboration.

## Phase 3: Permissions & Security Governance

- **Group-Based Access:** All permissions are managed strictly through standard SharePoint Online groups (Owners, Members, Visitors) or Microsoft 365 Groups.



- **No Unique Permissions:** Explicit permission inheritance breaks are documented, justified by business need, and minimized.
- **Oversharing Protection:** If the site contains sensitive data, explicit group restrictions are applied via SharePoint Advanced Management (SAM).
- **External Sharing Configuration:** Site-level external sharing settings are aligned with tenant policy (e.g., restricted to authenticated users only).

#### **Phase 4: Performance & Launch Readiness**

- **Page Weight Audit:** The homepage contains no more than 3-4 active web parts (e.g., news, quick links, highlighted content).
- **Speed Benchmarking:** The site has been analyzed using the Page Diagnostics for SharePoint tool and meets performance baselines.
- **Ownership Assignment:** At least two (but no more than four) active site owners are formally assigned and trained on access review protocols.