



GA4 Migration Checklist



marketingmojo

On March 16, 2022, [Google announced](#) that Google Universal Analytics (UA) would stop collecting data in its properties and reporting views as of July 1, 2023. This means that all Google Analytics users will need to migrate to the newest version of analytics, Google Analytics 4 (GA4) on or before July 1, 2023. For Google Analytics 360 customers (paid version of Google Analytics), these reporting views will stop processing on October 1, 2023.

This migration can be somewhat complicated and should occur in multiple steps. Marketing Mojo has compiled this checklist to assist you with transitioning from UA to GA4.

1. Activate Your New GA4 Property

To ensure you will have year-over-year data available to you beginning on July 1, 2023, it's important to ensure that you *at minimum* have your GA4 property created on or before **July 1, 2022**. Even if you are unable to finish all items in steps 2 and 3 before July 1, 2022, at least ensure that your GA4 property is beginning to track data so the data will be available to you next year.

If you have not already created your GA4 property, go to your property settings in the Admin of your current UA property and click on "GA4 Setup Assistance". Then select "Get Started". This will help you get started with the setup.

2. Document Your Current UA Setup

By design, GA4 does not work exactly the same as UA. For example, reporting views are no longer available in GA4. So items set at the reporting view level in UA need to be migrated to the new property-level GA4 instance.

- | | |
|--|--|
| <input type="checkbox"/> List out all events for each view | <input type="checkbox"/> List out all audiences in each view |
| <input type="checkbox"/> List out goals for each view | <input type="checkbox"/> List out all content groupings in each view |
| <input type="checkbox"/> List out all custom dimensions/metrics for property | <input type="checkbox"/> List out all referral exclusions for property |

3. Setup GA4 to Mirror your UA

Once you've listed out the tracking items you want to preserve from your UA property (properties), you can begin setting those tracking items up in your new GA4 property. Not all of the tracking items, however, are set up in the same way as they were in UA, so be sure to follow the links and directions associated with each tracking item in this list to ensure proper migration.

Events

Because events are set up programmatically, in theory they should migrate over to your new GA4 intact. However, GA4 now automatically creates some events for you. For example, a commonly utilized event in UA is scroll depth, which had to be set up manually in UA. In GA4, scroll depth may be an automatically created event.

Once your GA4 property is set up, go to **Configure > Events** in the left navigation. You'll see a list of the events that GA4 has automatically begun to detect and track.

For events you do not see in this list, you'll need to ensure that your manual event tagging is set up to work correctly with GA4. See <https://support.google.com/analytics/answer/10085872?hl=en> for detailed instructions and <https://support.google.com/analytics/answer/11091026>.

Goals

In GA4 goals are now called conversions. For goals from UA that were event-based goals, GA4 makes the setup very simple. Once the event is set up in GA4, simply select the toggle on that event to also treat it as a goal. You'll find the toggle named "Marked as conversion" as the rightmost column of the Events list in GA4 (Configure > Events).

To set up any non-event based goals, you can import these goals from the associated UA property. Go to your property settings for the GA4 property in Admin and navigate to Setup Assistant. Scroll down to the "Conversions" section and click "Get Started" to import your UA property goals into GA4.

Custom Dimensions/Metrics

As you may remember when setting up custom dimensions and/or metrics, there are two parts to the setup: adding code and setting up the dimension/metric in the Google Analytics interface. To establish your custom dimensions/metrics in GA4, your code should likely work fine with the migration, but you'll also need to take the step to set up the dimensions and metrics in the GA4 property.

To configure your custom dimensions/metrics in your GA4 property, choose Configure > Custom Definitions in your GA4 property. There are two tabs: Dimensions and Metrics. Under the appropriate tab, click on the "Create" button in the upper right and enter the information for your custom dimension or metric. Repeat this for every custom dimension or metric you are tracking.

Audiences

Audiences that you've created for advertising purposes in your UA reporting views will need to be recreated in GA4. From your list of audiences you created in step 2, recreate the ones marked "Google Analytics" in the Type column in your GA4 property.

To create an audience in GA4, navigate to Configure > Audiences and click on "New Audience" to build each audience. **Ideally, you should do this as soon as possible so that your ads will meet the minimum for audience members when you are ready to migrate to using GA4 audiences in your advertising.**

Content Groupings

If you're using content groupings in your current UA reporting views, you'll need to reprogram these for GA4. In GA4 content groupings are created programmatically versus in the interface itself. To migrate your current content groupings from UA to GA4, you'll need to add content groupings tags to the group's web pages. Each page can be a member of multiple content groups — just add a tag for each group it is a member of.

```
gtag('set', 'content_group', 'womens');
```

In the example above, the content grouping is set to “womens”, such as with womens clothing. Add as many gtags as needed to accommodate for all of the content groupings the page should belong to. It's likely easiest to do this via Google Tag Manager. For detailed information on how to add content groupings in GA4, reference this help page from Google: <https://support.google.com/analytics/answer/11523339?hl=en>.

Referral Exclusions

Referral exclusions for UA are set at the property level, and the same is true for GA4. However, the location of referral exclusions can be a bit tricky to find in GA4. Navigate to the GA4 Admin and select Data Streams from the list. From there, select your website in the list, then scroll to the bottom of the page and select “More Tagging Settings” under “Additional Settings”. From there, select “List Unwanted Referrals” under the “Tag Configuration” heading. Using the list of referral exclusions you created in step 2, recreate those referral exclusions in your GA4 property.

Product Links

You likely had your UA property linked to various Google products, such as Google Ads, and other online applications. To reconnect those in your GA4 property, in your GA4 property under the Admin settings, select each product link type you wish to reconnect and set each one up. In GA4, you can now also add Google Merchant Center to your product links, so if you are using ecommerce on your site and utilizing Google Merchant Center, be sure to add this product link in addition to the others you added to your list in step 2.

4. Plan for Full Migration and Archive UA

After you've fully migrated your current UA reporting views/properties over to your new GA4 property (properties), you're not quite done yet! In addition to requiring everyone to update to GA4 by July 1, 2023, Google also announced that it would begin **deleting all historical UA data on or about January 1, 2024**. This means that in order for you to access data from your UA reporting views for historical tracking, you'll need to archive your UA data.

Select a Date for Your Organization's Reporting Move to GA4

Even though you've set up your GA4 property and it has begun tracking data, you may not want to rely on your GA4 property for your reporting until a later date. Once you have set up your GA4 property and you feel confident that it collecting data consistently and accurately and mirrors your UA reporting views, ideally set your reporting date switch to one year from that date. This would ensure that you have comparable year-over-year reporting after your switch. However, remember, that this date for reporting switch will *at latest* need to be July 1, 2023 for free GA users and October 1, 2023 for GA 360 users.

Record Any New Revisions to Data Collection in UA to GA4

During the period where you are still using UA for reporting (up until July 1, 2023), be sure to include any updates to data collection that you make in your UA reporting views and properties to reflect the same way in your GA4 property.

Archive UA Data

Archiving the UA data will be tricky. You'll want to begin this process on or after the date when you migrate your organizational reporting to GA4. Consider two main areas when archiving: 1) the types of reports you typically collect and how you typically filter them and 2) the intervals at which you normally access the data. For example, if I typically access the source/medium report in UA on a monthly basis to report month-over-month changes, I would archive the source/medium data in monthly intervals. You'll also need to decide how many years' worth of data you want to archive.

There are multiple ways to archive the data, as listed here by Google: <https://support.google.com/analytics/answer/11583528?hl=en>, however we recommend using either the Google Analytics API or the [Google Sheets add-on](#) (which uses the Google Analytics API) to archive in the simplest manner. **But be careful of sampling issues!** If you pull too much data at once, the API (and Sheets add-on) will sample the data and not provide the full dataset. If this happens, select shorter timeframes or filter the data less to reduce sampling.

Make an Annotations Plan

If your organization is currently using the Annotations feature in UA, you will need to develop an alternative option for making annotations with your team once you've migrated to GA4, as the annotations feature has not been carried over from UA to GA4 at this time.

When archiving your UA data, also download your annotations from UA and add them to a Google Sheet. Going forward you can share this Google Sheet with your team members to update as they make change to your GA4 property.

Still need help with the migration?

Contact us to help you with your organization's migration and fixing any migration issues you encounter. 