

Getting started with GA4: Migration Checklist.

Making it easy to upgrade your Google Analytics implementation to Google Analytics 4 (GA4)



● Introduction.

Thank you for downloading this Google Analytics 4 (GA4) migration checklist.

This is a technical implementation guide designed to help analytics teams upgrade from the deprecating Universal Analytics (UA) to the new Google Analytics 4 (GA4) measurement library.

Our guide details the first steps into setting up Google Analytics 4.

Questions or need support? Call our GA4 specialists on 1300 087 137

● Who is this guide for.

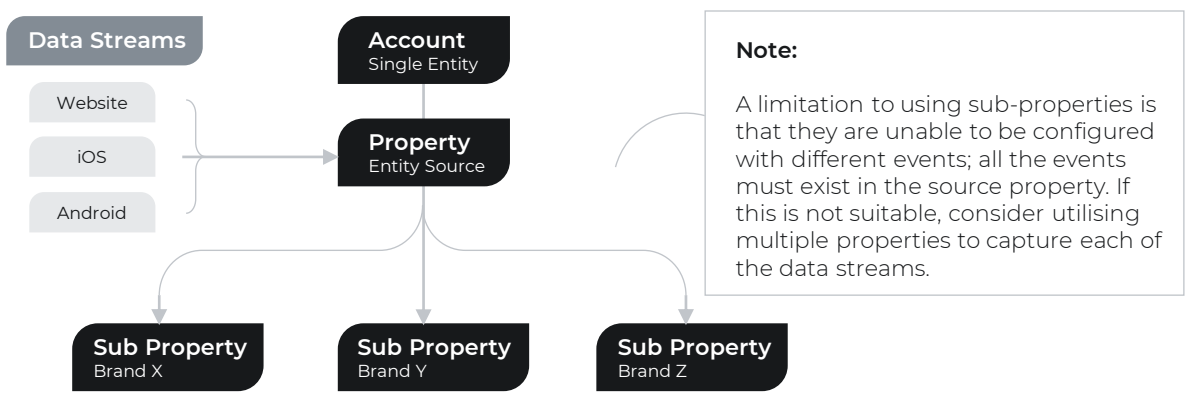
This guide is ideal for analysts, technical marketers, developers and entrepreneurs that are planning on setting up Google Analytics 4 for their organisation or for those interested in deepening their knowledge of GA4 configurations.

● GA4 Migration Checklist.

Step	Task	Page	✓
01	Determine Account and Property Structure	Page 3	
02	Setup Google Analytics 4 Properties	Page 4	
03	Create Data Streams and Enable Data Collection	Page 5	
04	Activate Google Signals	Page 6	
05	Link Google Ads	Page 7	
06	Map Custom Events to GA4	Page 8	
07	Map Custom Dimensions to GA4	Page 9	
08	Migration of Goals and Conversions to GA4	Page 10	
09	Validate and Bid to Conversions in Google Ads	Page 11	
10	Migrate Audiences	Page 12	
11	Add Users	Page 13	
12	Train Your Team	Page 14	

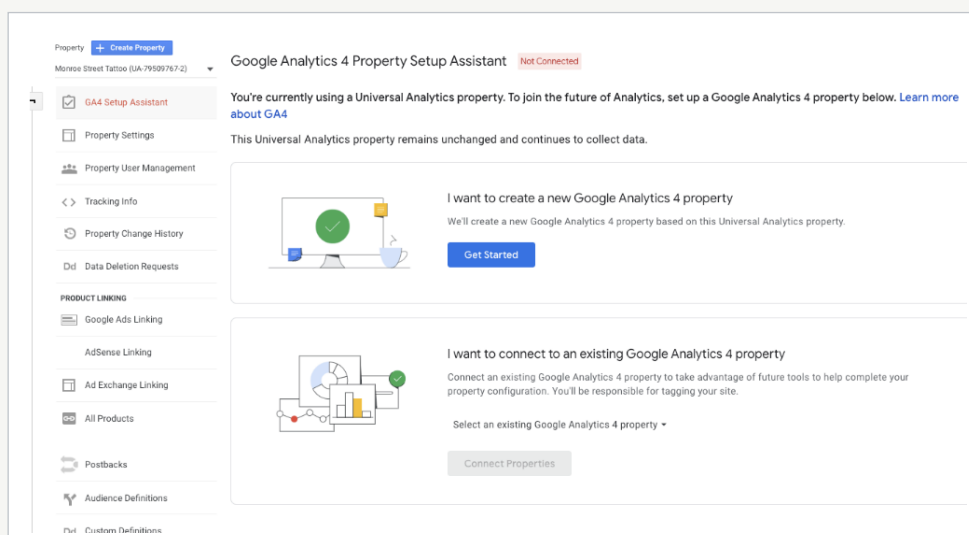
01. Determine Account and Property Structure.

Objective:	Develop account and property architecture.
In this step:	Plan the Google Analytics architecture and determine the account structure based on the organisation's internal reporting needs to determine the subdirectory and reporting views.
Considerations:	<ul style="list-style-type: none"> GA4 consists of 3 levels of hierarchies: Accounts, properties and data streams. <ul style="list-style-type: none"> We recommend businesses set up a single account for an entity, a property for each user base (brand, product line, application). There may be a use case where additional apps or website data streams may be included as applicable. GA4 provides Web, iOS and Android data streams. In GA4, the concept of data views has changed to sub-properties which is a 360 feature. Sub-properties can be created to develop specific slices of data for reporting and analysis. Search Console data can also be linked to a specific property, sub-property or roll-up property to enrich data. At the current stage of GA4, integrations of Google Ads and Big Query may impact the decision-making around the architecture of properties and data streams. <ul style="list-style-type: none"> For example, if all your data streams are in one property, all your data will end up in the same BigQuery dataset. However, more flexibility on feature integration is expected to be released in future iterations. <p>Our GA4 specialists are ready to help you and your organisation make the switch to GA4. Book a complimentary workshop to learn more.</p>
For Example:	<ul style="list-style-type: none"> Enterprise company A: 1 account Product line X (home insurance): 1 property Product line Y (car insurance): same property as X Product line Z (life insurance): same property as X & Y <p>In this case, the enterprise has chosen to have all lines of business send their data into a single property. They may have customers that regularly use multiple products, or often use upsell or cross-sell campaigns between products, so it makes sense to see all that data together. This property acts as a source property to sub-properties for individual product line analysis within GA360 accounts.</p>



02. Set Up Google Analytics 4 Properties.

Objective:	Set up required properties for the account.
In this step:	Translate UA properties and views into GA4 Properties and data streams as the GA4 account, property, and view structure is different to UA and GA4 introduces data streams.
Considerations:	<ul style="list-style-type: none"> GA4 properties can be set up in two methods: Create a new GA4 property or connect to a previously established UA property and use the Setup Wizard to transfer the configuration to a new GA4 property. If a gtag.js supported website builder/CMS is being used for the website Enable Data Collection Using Existing Tags will migrate standard tags straight into the new GA4 property. If not, tags will need to be migrated manually. If apps are already using Firebase, consider linking your Firebase project to your GA4 property. Each Firebase project corresponds with a single GA4 property. Therefore, if there are multiple Firebase projects you may consider setting up a property for each of these. This must be completed from Firebase and may require IT support to link Firebase and GA4
Note:	<ul style="list-style-type: none"> GA4 properties are built off an event-based data model, rather than session-based data in UA. It is recommended to create a minimum of two GA4 properties: One for production, and the other for a lower environment such as developer, testing, or UAT. Editor level access is required to use the GA4 setup assistant. The new property will not have access to historical data; therefore, it is recommended to run UA and GA4 properties in parallel. If you need to manually add the gtag.js tag to the pages, ensure that the analytics.js tag remains to provide data to both GA4 and Universal. Filter configuration for data transformation is now handled through event creation and modification, such as utm_campaign to lowercase. Setting up cross-domain traffic is now built into GA4 and doesn't require a TMS.



03. Create Data Streams and Enable Data Collection.

Objective:	Create the required data streams and set up data collection.
In this step:	Create data streams and enable data collection in GA4. Data is now collected at the stream level, changes to data collection can happen within the individual stream details or configuration tag or property settings.
Considerations:	<ul style="list-style-type: none">• Data streams are part of the new GA4 structure. There may be a use case where additional apps or website data streams may be included as applicable.<ul style="list-style-type: none">○ If you are using multiple websites cross-domain tracking can be set up to maintain User ID across domains.○ If you are tracking analytics within your mobile apps, GA4 can be established with iOS and Android specific data streams.• Filters can be applied directly to the reports to adjust and modify how you track and view your data from each stream.• To set up data collection for sites hosted on anything other than Google Sites, Wix, WooCommerce, and Wordpress.com, the global site tag will need to be implemented in custom HTML.
Note:	<ul style="list-style-type: none">• You will need to have edit access to both properties to set up cross-domain tracking.• If using a Tag Management Solution (TMS) a GA4 Configuration Tag must be implemented.• GA4 properties have a 1:1 relationship with Google Cloud projects, and each Cloud project can only be associated with one billing account.



04. Activate Google Signals.

Objective:	Enhance GA4 features with Google Ads Personalisation Data.
In this step:	Activate Google Signals to allow advertisers to track certain users across different devices and understand how different channels and touchpoints play a part in the customer journey.
Considerations:	<ul style="list-style-type: none">• Google Signals impacts the following:<ul style="list-style-type: none">◦ Remarketing Audiences: Serve ads to eligible cross-device users that have Ad Personalisation on.◦ Advertising, Demographic and Interest Reports: Collect additional information.◦ Cross-Device Reports: Models behaviour (user-based and still in beta).• This is assisted by a user signing into a Google account and use that identifier to track the user's path across devices and locations.• Enabling Google Signals increases the visibility of data for Google; however, this data is aggregated rather than personalised and is held within Google's retention policy for a limited time.<ul style="list-style-type: none">◦ Enabling Google Signals does not determine whether data is shared with other Google products, this is determined by data-sharing and product-linking settings.• To use Google Signals in a Roll-Up property it is recommended that the Roll-Up Property and the Source Properties all have Google Signals enabled as this will enable the best modelling.• Google Signals can be enabled (and disabled) from within the UI in the GA4 Property Settings or via a script modification in the GA4 tag being used to collect data. Given these approaches, GA4 provides an option to disable Signals both for an entire property or for individual users.
Note:	<ul style="list-style-type: none">• Google Signals must be enabled to populate audiences exported to YouTube.• Impact on Analytics when Google Signals are disabled:<ul style="list-style-type: none">◦ Disabling Google Signals data collection will also disable Ads Personalization, regardless of the dynamic indication in this field. This does not apply in reverse. Disabling Ads Personalization will only disable the feature set associated with this classification, it will not disable Google Signals data collection in total.◦ Users with this indication will not be included in remarketing audiences that are shared with other linked Google Ads platforms.

There are several unsupported features that are not yet enabled, including:

BigQuery	Additional data collected by Google signals is not exported to BigQuery.
Dashboards	You cannot yet use data collected by Google signals in dashboards.
Custom reports	You cannot yet use data collected by Google signals in custom reports.
Custom tables	You cannot yet use data collected by Google signals in custom tables.
User-ID views	You cannot yet access Google signals in User-ID views.
Segments	You cannot yet apply segments to the Cross-Device reports.
Intra-day data	The Cross-Device reports do not yet display intra-day data.
Mobile-app	Cross-Device is not yet enabled for mobile app properties.
Reporting API	You cannot yet use data collected by Google signals in the Reporting API.
Data Studio	You cannot yet use data collected by Google signals in Data Studio reports.
Smart lists	You cannot yet use data collected by Google signals to generate Smart Lists.

● 05. Link Google Ads.

Objective:	Link Google Ads and GA4 properties.
In this step:	Set up the integration between Google Ads and the GA4 property. Having 1-to-1 correspondence between Google Ads and GA4 will generally be best practice to allow data integration.
Considerations:	<ul style="list-style-type: none">• Enabling the link between Google Ads and GA4 properties allows for additional reporting (campaigns and dimensions), conversions and remarketing functionalities.• If Google Ads is currently connected to a UA account, then the Google Ads Migration Tool can be utilised to link the GA4 property and Google Ads account.• Once the link is enabled Google Ads data will be available in the GA4 reports (within the connected property).
Note:	<ul style="list-style-type: none">• Editor access in GA4 and Administrator access in Google Ads are required to enable the link.• A link to a Google Ads manager account counts as 1 link, otherwise if connected individually, there is a limit of 400 links.• Once the link is created, conversions must still be imported (for bidding) and audiences must be added to a campaign or ad group (for remarketing).






● 06. Map Custom Events to GA4.

Objective:	Migrate essential event tracking from UA to GA4.
In this step:	Create custom events with event scoped custom dimensions and user scoped custom dimensions that enrich your existing event reports
Considerations:	<ul style="list-style-type: none">• GA4 data is built around events and parameters.• If UA is implemented with gtag.js consider using dual tag via Enable data collection using your existing tags or by adding a new config directive with the GA4 measurement ID.• Events should be created when there is no equivalent in GA4, if there is a duplicate event it does not need to be recreated.• If utilising both web and app events the same event name and associated parameters should be utilised (they should be comparable). User ID should also be passed the same through the web and app events.• Recommended event names should be used as much as possible to ensure future reporting capabilities can be fully accessed.
Note:	<ul style="list-style-type: none">• Recommended events are similar to custom events and are not automatically tracked, they still require a measurement code. They are also treated separately (or will be in a future update) within reporting.• Triggers and Variables from UA can be used for GA4 event tracking.• A 'send_to' parameter can route events from UA to a GA4 event that already exists.• Not all recommended events populate built-in reports but may in the future.• 25 custom parameters can be configured per GA4 property. This is in addition to the automatically collected parameters (such as page_location for the page_view event)• Google Analytics 360 provides higher limits for Google Analytics 4 property data collection, reporting, retention, and export to BigQuery.

07. Map Custom Dimensions to GA4.

Objective:	Ensure all taxonomies from the website are collected in GA4.
In this step:	Create custom dimensions with event scoped custom dimensions and user scoped custom dimensions that enrich your existing event reports
Considerations:	All custom dimensions will want to be maintained from UA if relevant. Additionally, many of the values tracked as event dimensions in UA such as Event Category, Action and Label will want to be added as Custom Dimensions.
Note:	<ul style="list-style-type: none"> Passing custom parameters with a page view requires one of two steps. <ul style="list-style-type: none"> Update the page_view event to include additional parameters (best for when you need to add custom parameters to most page views). Create a custom event to capture additional parameters, for example, record_page_metadata. However, this can duplicate event recordings so should be used for a small portion of pageviews or when it is expected to exceed your monthly quotas.

Use Case	UA	GA4 - auto collected or custom event	GA4 - custom dimension or metric
 Measure video engagement	Event Action = video_start	Turn on "Video engagement" in enhanced measurement.	If you want visibility into video progress, create a custom dimension based on video_percent
	Event Category = engagement		
	Event Label = lesson-1		Create a custom dimension based on video_title
 Record loan calculator interactions	Event Action = loan-calculator	Event name: loan_calculator (custom)	
	Event Category = refinance	Event parameter: loan_type = refinance (custom)	Create a custom dimension based on this event parameter
	Event Label = residential	Event parameter: borrower_type = residential (custom)	Create a custom dimension based on this event parameter
	Current Borrower (custom dimension) = true	Event parameter: current_borrower = true (custom)	Create a custom dimension based on this event parameter
	Loan Amount (custom metric) = 250000	Event parameter: loan_amount = 250000 (custom)	Create a custom metric based on this event parameter *
 Record loyalty level when a user logs in	Event Action = login	Event name: login (recommended)	
	Event Category = login ***		
	Loyalty Level (custom dimension) = platinum	Event parameter: loyalty_level = platinum (custom)	Create a custom dimension based on this event parameter (user-scope)

08. Migration of Goals and Conversions to GA4.

Objective:	Replicate UA Goals and conversions in GA4.
In this step:	Map out goals and create the necessary Tags and Triggers to convert all Goals to events as GA4 does not offer goals and they are configured under events.
Considerations:	<ul style="list-style-type: none">• To migrate eCommerce reporting a duplicate event should be created in GA4 with the recommended event names and parameters. Implementations should be kept separate as both configurations are specific to the Analytics iteration. Implemented dataLayers will require updating to register the appropriate events.• If bidding on UA conversions in Google Ads these conversions can be replicated in GA4 (further detail in next step).• Goals can be migrated directly from UA accounts with destination, event and engagement goals available. Up to 30 conversions can be configured in GA4 (50 for 360 accounts) and therefore there should be consideration of consolidating relevant goals.
Note:	<ul style="list-style-type: none">• GA4 automatically tracks several events on your site, without needing to add event code manually. Events appear in a list and can be turned into a conversion directly from here.• GA4 does not support regular expressions when defining an event.• Funnels can be created in GA4 based on events and filtering.• May require developer input to assist in the implementation of the updated dataLayer.• If the required parameters for eCommerce specific events are not used, the information will be passed as a custom event and not within the GA4 eCommerce reporting.

Example of required GA4 eCommerce parameters:

Event name	Parameters
view_item	currency, items, value
view_item_list	items, item_list_name, item_list_id
select_item	items, item_list_name, item_list_id
add_to_wishlist	currency, items, value
add_to_cart	currency, items, value



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● 09. Validate and Bid to Conversions in Google Ads.

Objective:	Replicate and import bid conversions into GA4.
In this step:	Use GA4 audiences and conversion-event data (app and web) for bid optimization in Google Ads by linking your Google Analytics 4 property to your Google Ads account
Considerations:	<ul style="list-style-type: none">• GA4 and Google Ads must be connected with auto-tagging to import conversions.• Avoid duplicating conversions by removing them within Google Ads or creating primary and secondary conversions.• Before implementing GA4 conversions into Google Ads it is recommended to compare conversion volume in GA4 and UA (these should be as close as possible but there are some factors that may prevent the numbers from matching).• If the figures differ substantially, validation on the conversions should be completed.
Note:	Two weeks of conversion data should be used as a minimum for the comparison between GA4 and UA conversions.



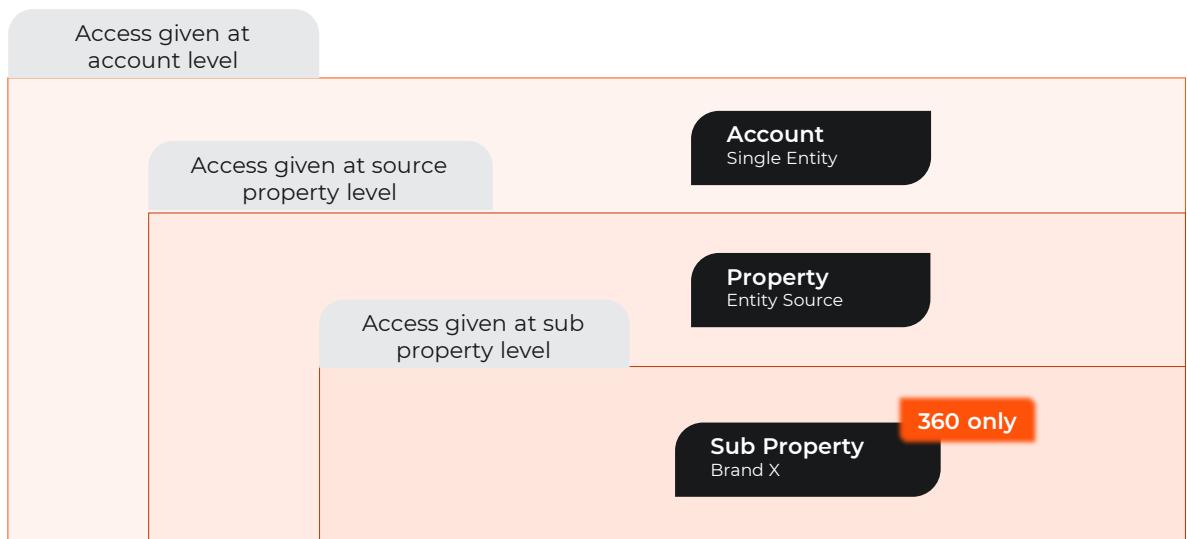
10. Migrate Audiences.

Objective:	Identify the same user groups from UA in GA4 and push them to Google Ads.
In this step:	Create audience segments in GA4 using the 'Audience triggers' feature to configure GA4 to automatically generate an event. This enables you to mark that event as a conversion.
Considerations:	<ul style="list-style-type: none">• 100 audiences can be created per GA4 property (400 for GA360 accounts). These audiences automatically update everywhere, consider combining audiences if the 100 becomes limiting.• Audiences will need to be manually recreated within GA4. To replicate UA audiences with custom dimensions these also will need to be replicated.
Note:	<ul style="list-style-type: none">• When an audience is connected to a campaign or ad group, Google Ads will deduplicate users that are present in both UA and GA4 audiences.• Ensure that the GA4 audiences are added to the targeting options in addition to current UA audiences.



11. Add Users.

Objective:	Define users and user groups.
In this step:	Add users to the GA4 account, grant access to members and users or grant more permissions to share data seamlessly, manage users, edit settings, etc.
Considerations:	<ul style="list-style-type: none">• Users can be added at the account or property level. If you give someone access at the account level, they will immediately have access to the properties within that account. Whereas at the property level, it provides access to that property with the permissions you provide.• A user can be given permission down the hierarchy, for example, if given access at the account level they will also have the same level of access at the property level within that account.• A user group can be added to any level of the hierarchy.
Note:	<ul style="list-style-type: none">• To add or modify users or user groups, administrator access is required.• As many users as required can be added.



12. Train Your Team.

Objective:	Once you have GA4 up and running. You'll want to know how to use the platform
In this step:	Educate your stakeholders, and teams across the organisation on the value of digital analytics. Empower your teams to use the platform for reporting, insights, and powerful use cases to grow your business including media efficiency, media effectiveness, user experience, conversion rate optimization, and more
Introduction to Analytics course	Learning Objectives: <ul style="list-style-type: none">• What is web analytics?• Getting started with Google Analytics• The Audience reports: understand who is visiting your website• The Traffic Sources reports: how did they get here?• The Content reports: what did they do on my site?• The Conversions and eCommerce reports: how much are they worth?
Advanced Analytics Insights Course	Learning Objectives: <ul style="list-style-type: none">• Reporting vs. Actionable Analysis• Advanced Campaign Tracking• Advanced Segments• Custom Reports• Analytics for SEO• Analytics for SEM• Analytics for User Engagement• Multi-Channel Attribution Funnels• Customer Journey Flows• Social Media & Real-Time Reports
Analytics Implementation Practitioner Course	Learning Objectives: <ul style="list-style-type: none">• Advanced use cases• Advanced implementation• Advanced reporting• Handling Cross-Domain Tracking and Subdomain Tracking• Configuration and Administration of Google Analytics• Cleaning Up Your Data with Filters• Optimise Experiments (A/B tests)• Event Tracking & Virtual Pageviews• Advanced Conversions and eCommerce• Custom Variables setting



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Introduction.

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By helping our clients overcome their most complex digital marketing challenges we have developed comprehensive Consulting, Products, Services, Technology and Training solutions, all of which are delivered with a focus on key metrics that ladder up to deliver remarkable ROI.

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