

element iQ

# GOOGLE ANALYTICS 4 MIGRATION

 CHECKLIST



Google Analytics 4 - It's new, and it's **TOTALLY** different from its predecessor (Universal Analytics/GA3). And (like it or not), it's the future of free website tracking and reporting.

In this short guide, we'll show you how to install and start using Google Analytics 4 (GA4), so you can eventually migrate your tracking to this new platform.

Before we get into the guide's steps, we will warn you: As of when the team wrote this, GA4 still lacks a lot of the functionality you're used to in Universal Analytics (GA3). In fact, the interface can be downright confusing to navigate.

That said, Google plans to make continual improvements to GA4 for the foreseeable future. So even though you may have to hang in there for a handful of months while you're waiting for this platform to mature... getting started today is still worth it for a couple of key reasons.

### **Reason #1: Your account data history**

GA4 uses a new data model (see glossary below). This means that you're starting from scratch when you create and install a new property using the GA4 platform. You can't bring over your data from Universal Analytics. The sooner you install GA4, the sooner you'll start collecting data you'll need for your website's historical analysis.

### **Reason #2: The early mover advantage**

Most users will wait to learn about GA4 until Google forces them to migrate to this platform. By downloading this guide, you've decided NOT to wait (insert \*pat on back\* here).

As one of the first to understand how to use GA4, you're building a competitive advantage into your skillset. In the not-so-distant future, when hundreds of thousands of businesses are in desperate need of someone who can help them with GA4, you'll be able to leverage your skills and gain a first-mover advantage.

One more housekeeping note before we get into the action. Below is a list of terms you'll find used in the language of this guide. You may already know these terms. But, I've included their definitions just to make sure we are on the same page.

# Glossary of Terms

**Google Universal Analytics (GA3)** - The version of Google Analytics that marketers have known and loved for years. Universal Analytics is loosely based on the same data and reports model since 2005. Google stopped recommending Universal Analytics on October 14, 2020.

**Google Analytics 4 (GA4)** - The newest (and now “recommended”) version of Google Analytics. This data model uses Google Analytics for Firebase and App + Web principles.

While App + Web properties have been available in Google Analytics for several years, they were experimental. Now, they are being given prime-time placement by Google with the rebranding of Google Analytics 4.

**Hit-Based Data Model** - Hits are how data is collected in Universal Google Analytics. A hit-based model sends data to Google’s servers every time a page is loaded. There are several hits that are used to measure other actions in addition to pageviews.

[See a full list of hit types](#)

**Event Data Model** - This refers to the underlying data collected by Google Analytics 4.

Instead of allowing several hits to come in, the GA4 model only collects data on events.

You can create event parameters in GA4 to make your data more meaningful. Learn more about the data model here.

[Learn more about the data model](#)

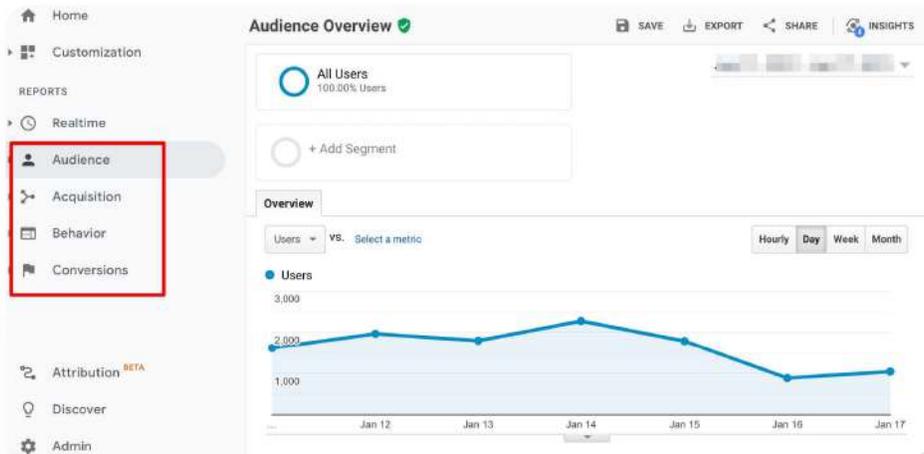
**Data Streams** - A source of data that feeds into Google Analytics 4 properties. You can have multiple streams of data coming into your property. However, Google recommends using a single web stream.

## Section 1:

# What is Your Google Analytics (GA3) Data Telling You Today?

If you have a Universal Analytics (GA3) account, which reports do you use most often?

Identifying the information that's of critical importance to your marketing will help guide your GA4 migration. So, in this step, you want to list out the reports you use most often. In GA3, you'll find the most commonly used reports in the "ABC" menus:



Look through your GA3 account to make a note of the reports you find most useful.

Make a note of the Google Analytics reports that are most important to my marketing:

These are the Google Analytics reports | can't live without:

Note: If your favorite reports are not available yet in GA4, chances are they will be available in the future. So it's still worthwhile to list them above in your checklist. This list will help you prepare to update your account as Google makes the features you need available.

## Section 2:

# What Data is a “must-have” in Google Analytics 4?

Let’s talk about the reporting features you need to make GA4 valuable.

Some of the features you love from GA3 may not be available yet. However, you still want to identify your mission-critical data now. Identifying your “must-have” features will help you create a blueprint for the GA4 account you want to build.

Here’s a list of features that I find vital to any Google Analytics account. Select the ones that are MOST important to you:

These are the “must-have” reporting features that I need in GA4:

- Campaign Tracking
- Channel Groupings
- Event Tracking
- Content Groupings
- Goals
- E-Commerce Reports
- Enhanced E-Commerce

This checklist will come in handy when you begin to customize your new GA4 property. Think of this as your roadmap for the future.

## Section 3:

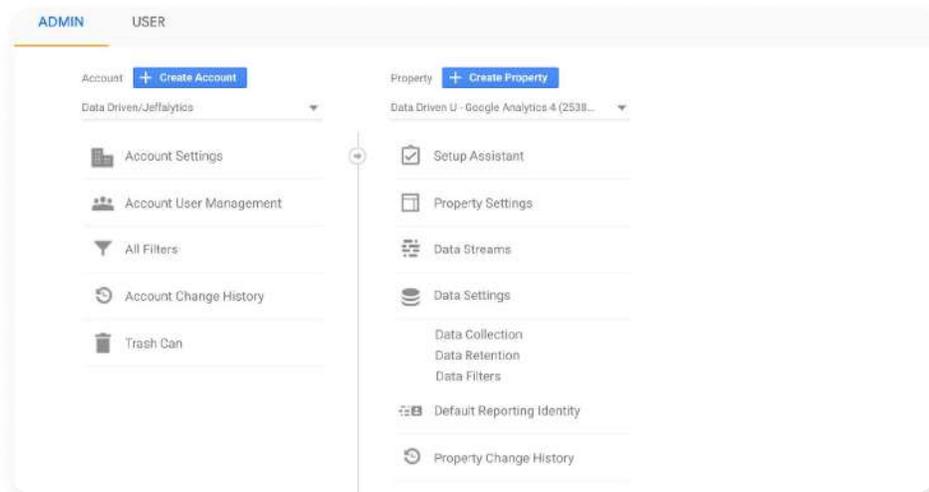
# Parallel Tracking

This next section shows you how to install GA4 on your website without risking any data loss from your existing GA3 property.

There's a simple way you can ensure you don't lose any of your data: Do NOT touch your GA3 property at all during the setup process. That's right! You can install GA4 entirely in parallel to GA3 without doing any harm. We call this technique parallel tracking. The experts at Google also recommend this technique.

To set up parallel tracking, follow these steps:

### Step 1: Create a Google Analytics 4 Property inside your GA Account



- **Step 2:** Name your new property. (And follow the setup instructions as they apply to your business and the type of property you need to create: web or app).

Create property

1 Property setup

**Property details**  
A property represents a business's web and/or app data. An account can contain one or more properties. [Learn more](#)  
\*Navigate to your [Firebase](#) account if you want to create a new property for an existing Firebase project.

Create a Google Analytics 4 property to measure your web and/or app data.

Property name

Reporting time zone  
United States (GMT-08:00) Los Angeles Time

Currency  
US Dollar (USD \$)

You can edit these property details later in Admin

[Show advanced options](#)

- **Step 3:** Enter your website URL, and give your property's data stream a name. Also, make sure you turn on "Enhanced measurement." Then, select "Create stream."

× Set up data stream

Set up your web stream

Website URL  
https://

Stream name

**Enhanced measurement**  
Automatically measure interactions and content on your sites in addition to standard page view measurement.  
Data from on-page elements such as links and embedded videos may be collected with relevant events.  
You must ensure that no personally-identifiable information will be sent to Google. [Learn more](#)

Measuring:  Page views  Scrolls  Outbound clicks + 3 more

#### □ **Step 4:** Install your new GA tracking code on your site.

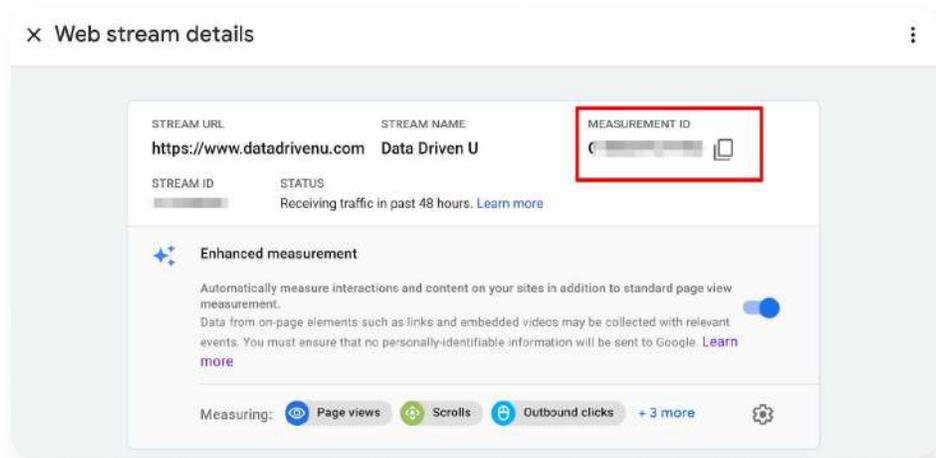
Now, you have a choice to make. There are two ways to get the code on your site.

1. You can use Google's website tagging software, Google Tag Manager (GTM). If you have a GTM account, Tag Manager is the simplest way to install GA4. (It only takes a couple of button clicks). Our agency always uses GTM and recommends all of our clients to go this route as it is part of Google's best practices.
2. You can install GA4 by manually adding the tracking code to your site.

First, I'll cover how to install GA4 using GTM. Then, I'll address the process for manually adding your tracking code to your website.

#### □ I am installing my GA4 tracking code using Google Tag Manager (Recommended).

**Step 1:** To install your tracking code using GTM, start by copying your measurement ID.



**Step 2:** Next, in GTM, create a GA4 tag and paste your measurement ID into that tag.

Tag Configuration

Tag Type

Google Analytics: GA4 Configuration  
Google Marketing Platform

Measurement ID ⓘ

Send a page view event when this configuration loads

> Fields to Set

> User Properties

> Advanced Settings

**Step 3:** After that, set up a pageview trigger for that tag. This trigger should fire on all pages.

Tag Configuration

Tag Type

Google Analytics: GA4 Configuration  
Google Marketing Platform

Triggering

Firing Triggers +

All Pages  
Page View -

Add Exception

**Step 4:** Finally, remember to test your tag in preview mode and then publish it, so it goes live on your site.



I am installing my code manually

**Step 1:** If you're installing your code manually, open your global site tag. Then copy your code.



Step 2: Finally, add the code to your site, adhering to Google's instructions and the documentation provided by your website builder or content management system.

(Note: There are thousands of different website builders and CMS's that you could be using. So while we cannot provide detailed instructions for all of those systems, most of them have specific recommendations for adding Google Analytics to your website.)

Are you looking for a codeless option? Numerous CMS plugins will help you quickly add HTML code (and therefore the Google Analytics 4 tracking code) to your website without modifying your theme files.

Objective achieved: I created a new Google Analytics 4 property and installed the tracking code on my site.

## Section 4:

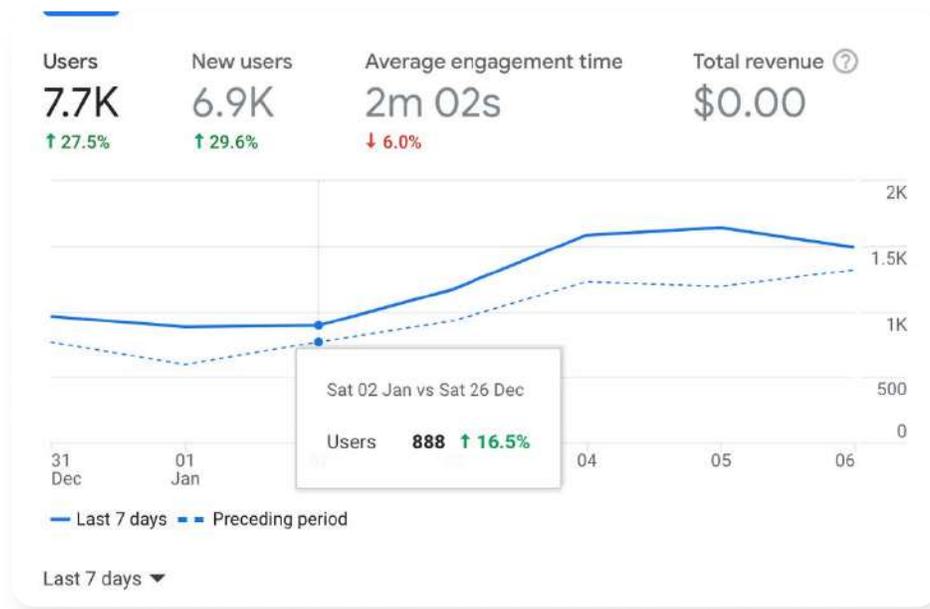
# Review Your Data

Now that you have GA4 installed, you want to make sure you're collecting data properly.

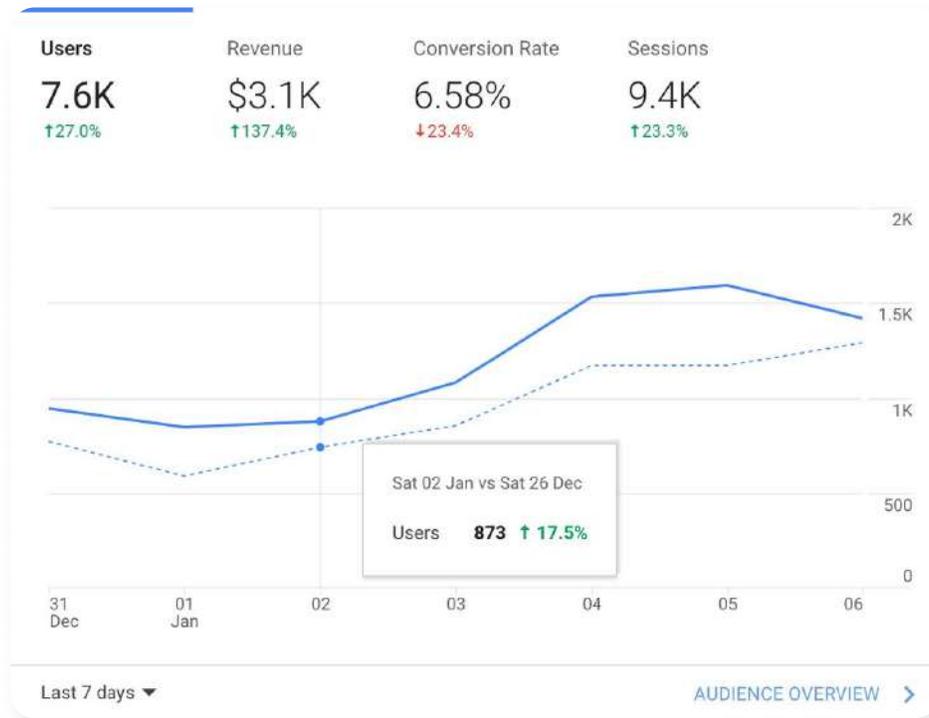
You also want to ensure that you have parity between the data in your new GA4 property and your Universal Analytics (GA3) account. Your numbers won't be a one-to-one match. But, they should be reasonably close - within 1-2% of each other.

Follow these steps to make sure your GA4 installation is working as it should:

- **Step 1:** Log in to your new GA4 account and select a calendar day/time period to see your results.



**Step 2:** Compare these results for the same time period in your Universal Analytics account



How does your data compare? If you're like the team here at ElementIQ, you'll notice that the data matches up pretty well. But if anything doesn't match, now is the time to document and diagnose the problem.

I noticed the following inconsistencies in my data:

**Objective:** I've compared the data collection in my GA4 and GA3 properties and documented any significant discrepancies that need more investigation.

## Section 5:

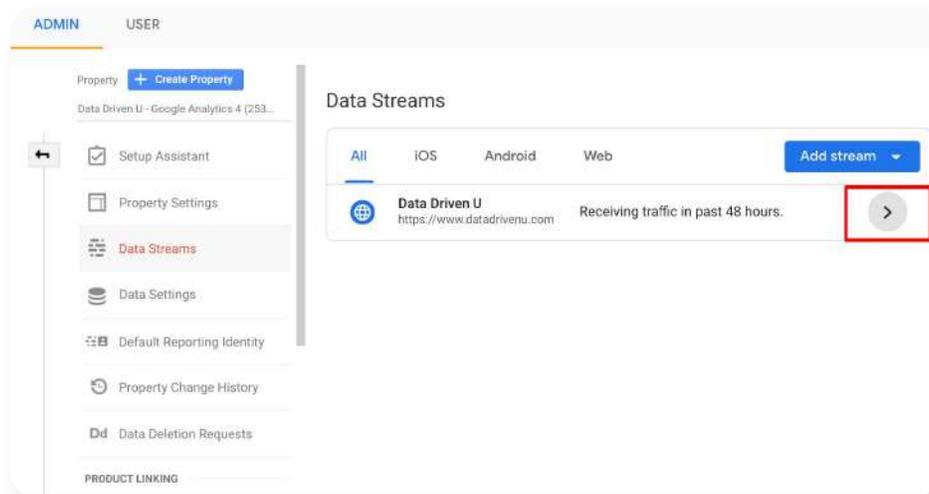
# Clean Up Your Data

Now that you're receiving data in GA4 and reviewing the reports coming in, it's time to make some enhancements to your data collection.

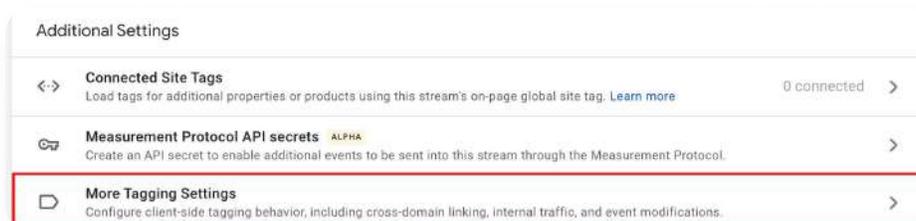
Let's start with the classic: Filtering internal traffic from showing up in your reports. Filtering internal traffic in GA4 feels more complicated than it was in GA3. However, once you get used to the setup, it's not that bad.

Follow these steps to set up your internal traffic filter:

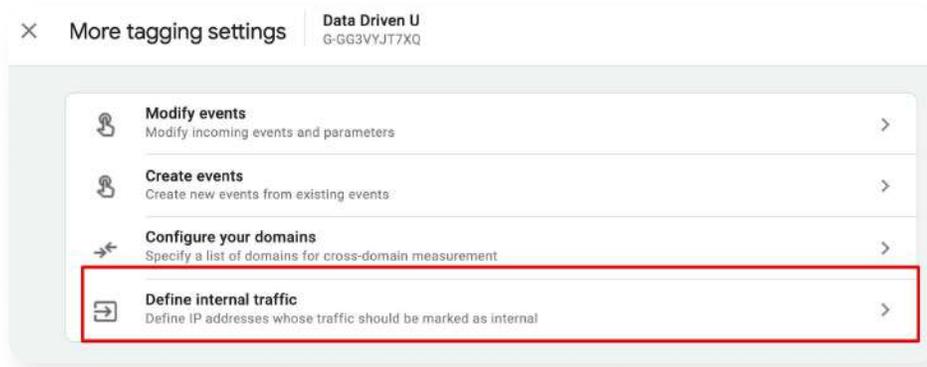
**Step 1:** In the admin area of your account, access your Data Stream.



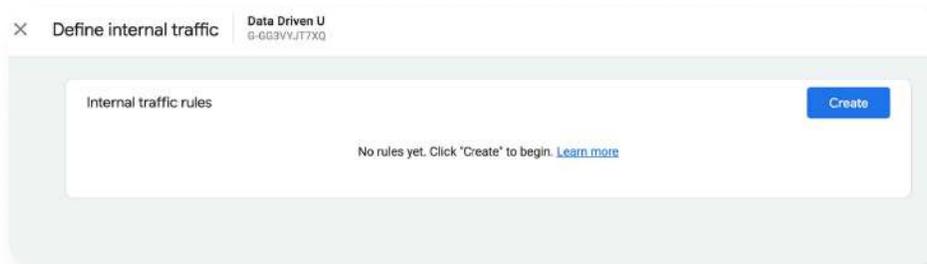
**Step 2:** Next, scroll down and select "More Tagging Settings."



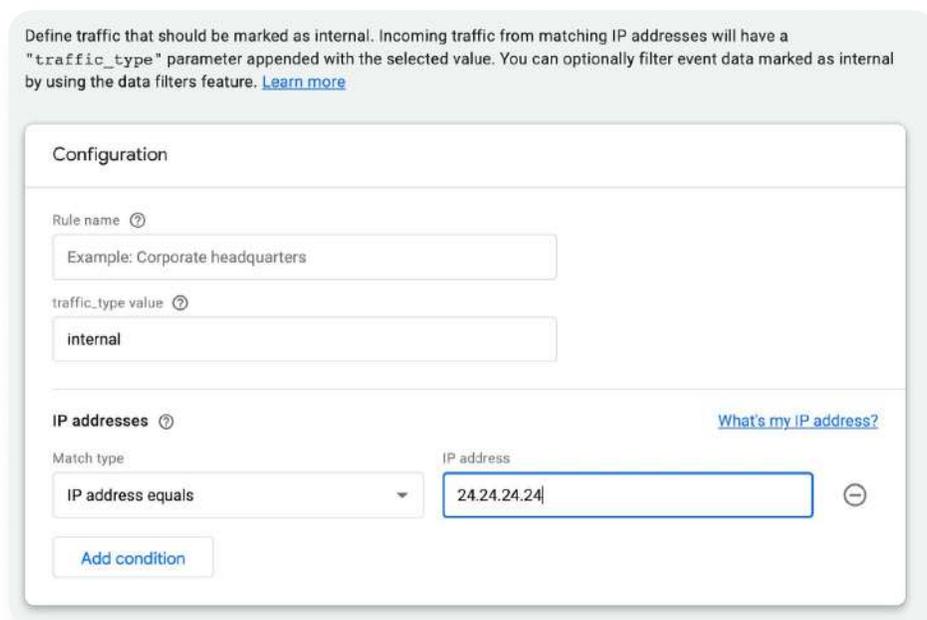
**Step 3:** Then, choose “Define internal traffic.”



**Step 4:** Create an internal traffic rule that filters one (or many) IP addresses out of your reports.



**Step 5:** Enter the IP address(es) you want to block from your reports.



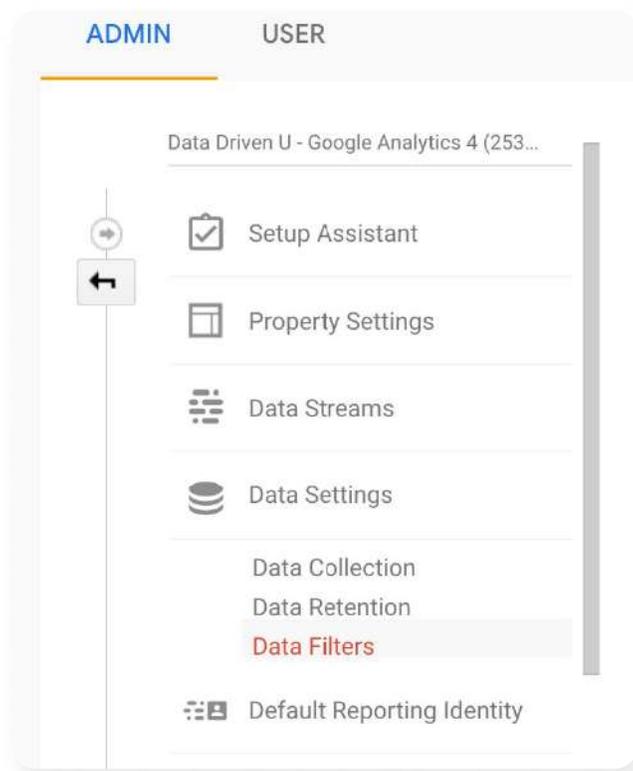
**Step 6:** You'll also need to enter a "Rule name." As in the example Google provides, it's helpful to choose a name that identifies the traffic source you're filtering.

**Step 7:** When you have your information entered correctly, click on The "create rule" button.

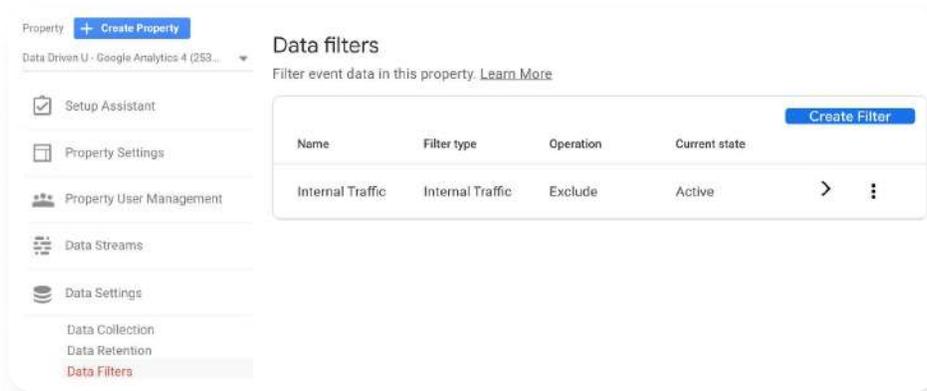
(Side Note: While this may feel like you're trying to learn a foreign language, it's not any less complicated than the internal traffic filters we've run for years in GA3. Listen, we strongly dislike this too. We're just trying to be Mr. Brightside here for you. Google Analytics 3 isn't coming back! We need to move on! We're Mr. Briiiiiightttt Siiiiiiide.)

Ok, so you've entered your IP address. Think you're done? Not so fast!

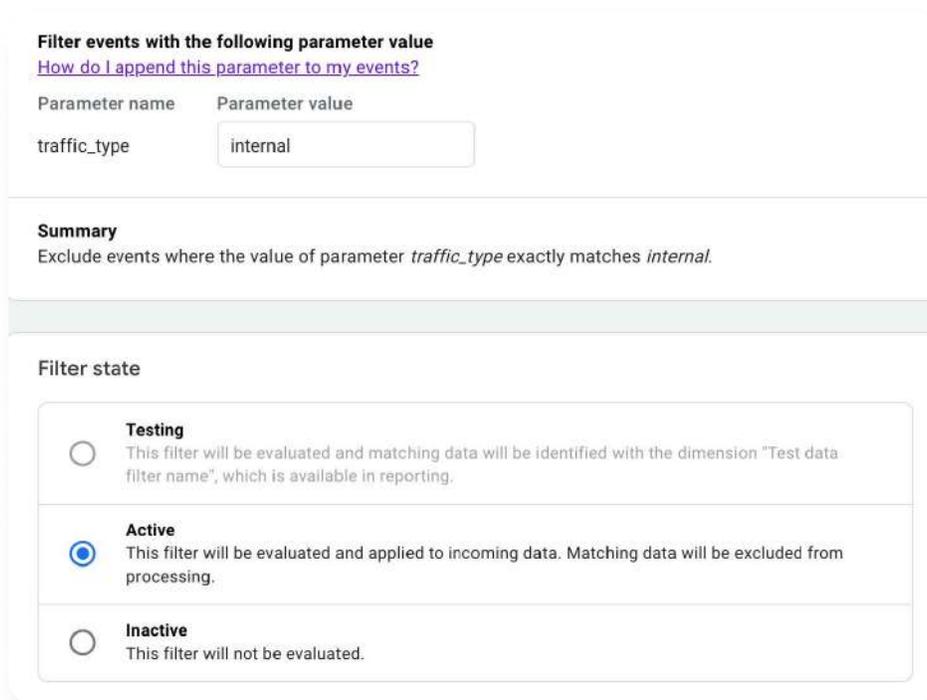
**Step 8:** Go into your Data Settings and select Data Filters.



**Step 9:** Next, select the Internal Traffic filter.



**Step 10:** Finally, change this filter from Testing to Active.



**Objective:** I created an internal traffic filter for my GA4 property.

**Resource:** [Google's support article on filtering internal traffic](#)

## Section 6:

# Enhance Your Data

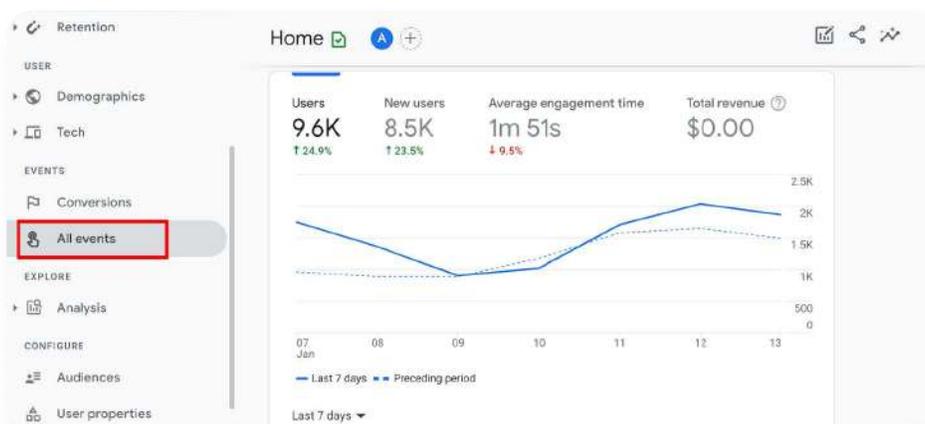
In GA3, you can track valuable actions that happen on your site as conversions. (Conversions are different from eCommerce tracking). People typically use conversions to track things like email-opt-ins, form submissions, or views of a high-value video.

In GA4, you can turn any of your website events (pageviews, video views, page scrolls, etc.) into conversions. To track a specific website activity as a conversion, you need to create a custom event.

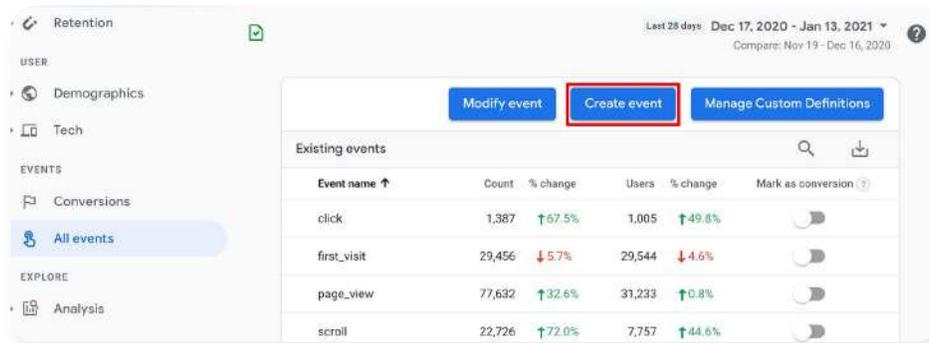
This section will show you how to quickly create a custom pageview event, which you can then track as a conversion.

Follow the steps below to create a custom pageview event:

**Step 1:** In the home screen of your account, select “All Events.”



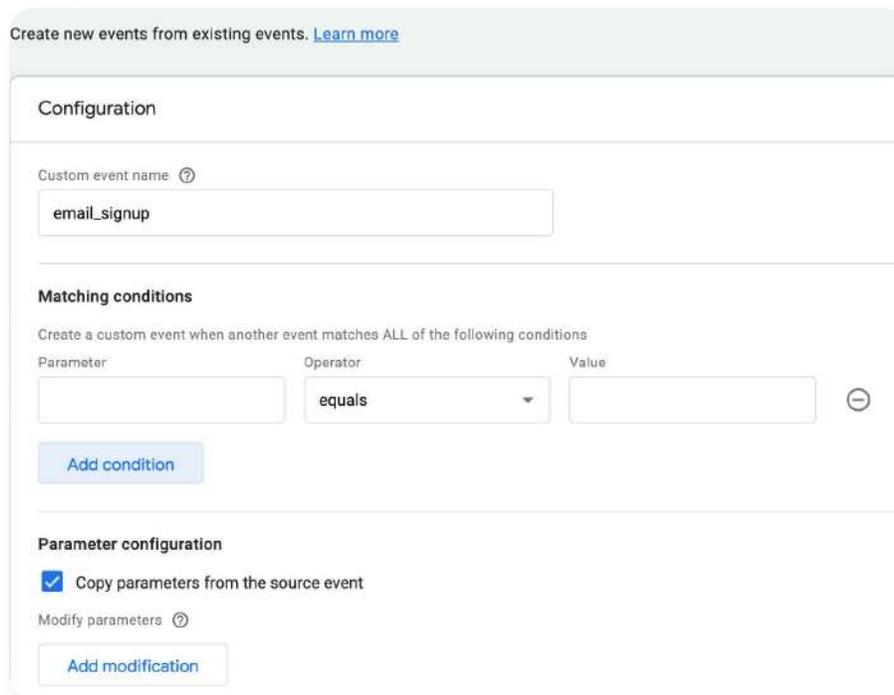
 **Step 2:** Next, select “Create event.”



The screenshot shows the Google Analytics 4 interface. On the left is a navigation menu with categories: USER, Demographics, Tech, EVENTS (with 'All events' selected), and EXPLORE (with 'Analysis' selected). The main content area shows a table of 'Existing events' with columns for Event name, Count, % change, Users, % change, and Mark as conversion. Above the table are three buttons: 'Modify event', 'Create event' (highlighted with a red box), and 'Manage Custom Definitions'. The top right corner shows the date range 'Last 28 days: Dec 17, 2020 - Jan 13, 2021' and a comparison period 'Compare: Nov 19 - Dec 16, 2020'.

Event name ↑	Count	% change	Users	% change	Mark as conversion ?
click	1,387	↑67.5%	1,005	↑49.8%	<input type="checkbox"/>
first_visit	29,456	↓5.7%	29,544	↓4.6%	<input type="checkbox"/>
page_view	77,632	↑32.6%	31,233	↑0.8%	<input type="checkbox"/>
scroll	22,726	↑72.0%	7,757	↑44.6%	<input type="checkbox"/>

 **Step 3:** In your event configuration, give your event an appropriate name.



The screenshot shows the 'Create new events from existing events' configuration form. At the top, it says 'Create new events from existing events. [Learn more](#)'. The form is divided into three sections: 'Configuration', 'Matching conditions', and 'Parameter configuration'. In the 'Configuration' section, the 'Custom event name' field contains 'email\_signup'. The 'Matching conditions' section has a heading 'Create a custom event when another event matches ALL of the following conditions' and a table with columns for 'Parameter', 'Operator', and 'Value'. The 'Operator' dropdown is set to 'equals'. Below this is an 'Add condition' button. The 'Parameter configuration' section has a checked checkbox for 'Copy parameters from the source event' and an 'Add modification' button.

- Step 4:** Then, in the first Matching condition, set your event Parameter to “event\_name,” and the value equal to “page\_view.”

Configuration

Custom event name ⓘ  
email\_signup

**Matching conditions**  
Create a custom event when another event matches ALL of the following conditions

Parameter	Operator	Value
event_name	equals	page_view

Add condition

**Parameter configuration**  
 Copy parameters from the source event  
Modify parameters ⓘ  
Add modification

- Step 5:** Add another condition, and in that condition, set the Parameter as “page\_location,” and the Operator as “contains.”

Configuration

Custom event name ⓘ  
email\_signup

**Matching conditions**  
Create a custom event when another event matches ALL of the following conditions

Parameter	Operator	Value
event_name	equals	page_view
page_location	contains	

Add condition

**Parameter configuration**  
 Copy parameters from the source event  
Modify parameters ⓘ

- Step 6:** In the Value field, add the URL string associated with the pageview you want to track. For example, all my email opt-in success pages contain the “/success” in the URL. So the value in my conversion event contains “/success.”

The screenshot shows the 'Configuration' section for a custom event. The 'Custom event name' field is set to 'email\_signup'. Under 'Matching conditions', there are two conditions: 'event\_name' equals 'page\_view' and 'page\_location' contains '/success'. The 'Parameter configuration' section has a checked box for 'Copy parameters from the source event'.

- Step 7:** Create your event.
- Step 8:** It will take approximately 24 hours for your custom event to show up in your reports. Once it does, you can select it as a conversion event to track in your reports.

The screenshot shows the 'Existing events' table in Google Analytics. The table has columns for Event name, Count, % change, Users, % change, and Mark as conversion. A red box highlights the 'Mark as conversion' column, which contains toggle switches for each event.

Event name ↑	Count	% change	Users	% change	Mark as conversion
click	1,387	↑67.5%	1,005	↑49.8%	<input type="checkbox"/>
first_visit	29,456	↓5.7%	29,544	↓4.6%	<input type="checkbox"/>
page_view	77,632	↑32.6%	31,233	↑0.8%	<input type="checkbox"/>
scroll	22,726	↑72.0%	7,757	↑44.6%	<input type="checkbox"/>
session_start	44,748	↑12.7%	31,391	↑1.3%	<input type="checkbox"/>
video_complete	176	↑29.4%	164	↑45.1%	<input type="checkbox"/>

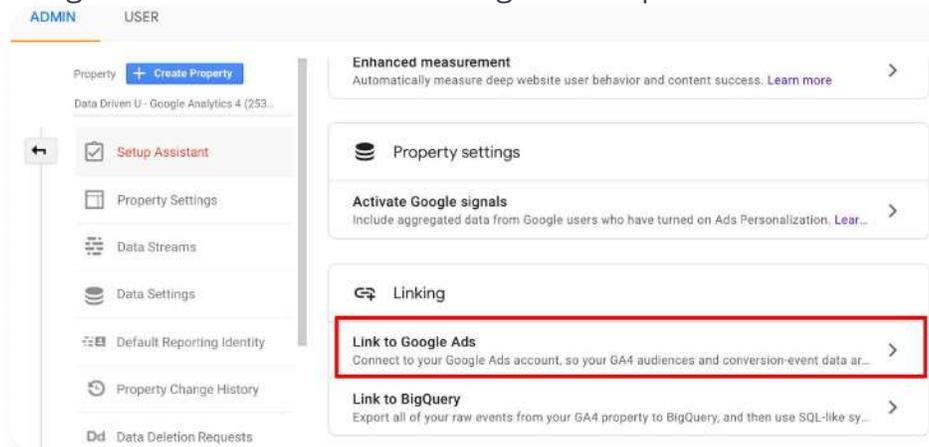
- Objective:** I created a custom event that I want to track as a conversion.

## Section 7: Set-up Integrations

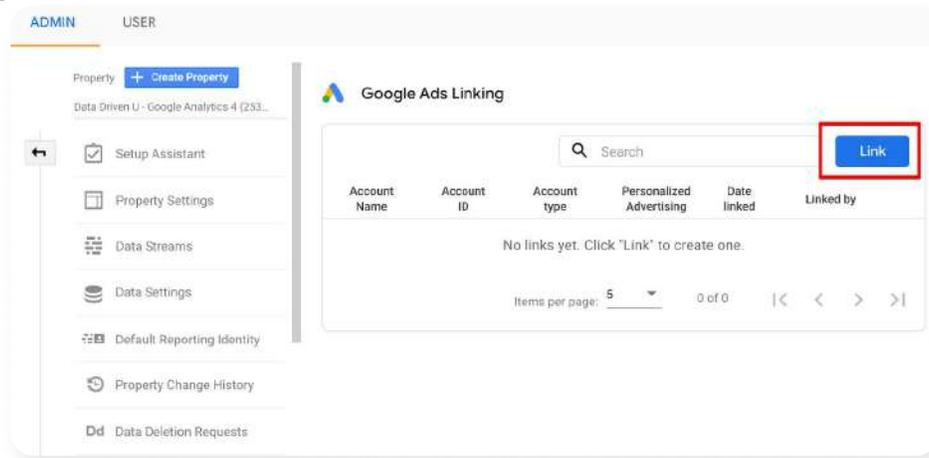
There are two core product integrations in GA4 you should pay attention to - Google Ads and BigQuery. Since Google Ads is the most common product integration in GA3, I'll briefly cover the steps for linking your GA4 account to Google Ads.

Follow these steps to link your GA4 account to your Google Ads account:

- **Step 1:** From the admin screen, select the setup assistant. Then scroll down to linking, and select the "Link to Google Ads" option.



- **Step 2:** Next, click the blue link button.



**Step 3:** Then, click “Choose Google Ads Accounts.”

Link setup

By linking your Analytics property to your Google Ads account, you will enable data to flow between the products. Data exported from your Analytics property into Google Ads is subject to the Google Ads terms of service, while Google Ads data imported into Analytics is subject to the Analytics terms of service. By creating this link, your email address will be recorded and may be visible to authorized users of this Google Analytics property and/or the linked Google Ads account. [Learn more](#)

- 1 Choose Google Ads accounts**  
Link to Google Ads accounts I manage [Choose Google Ads accounts](#)  
Next
- 2 Configure settings
- 3 Review and submit

**Step 4:** Select the Google Ads account you want to link to and hit confirm.

Link to Google Ads accounts I manage  [Confirm](#)

**i** To link a GA property to a Google Ads account, you must have "edit" permissions on the GA property and admin access on the Google Ads account. Google Ads accounts for which you have admin access are listed here.

Account name	Account ID	Account type
<input checked="" type="checkbox"/> PPC Course dot Com	[REDACTED]	Account

Items per page: 20 1 - 1 of 1 |< < > >|

**i** Selected: 1 (maximum: 20)  
You have selected a Google Ads account. You may not complete links to manager accounts and sub-accounts at the same time. You may create separate links to manager accounts once this link is completed.

**Step 5:** Review your settings and submit your link.

3 Review and submit

Link to Google Ads accounts I manage

**PPC Course dot Com**  
214-153-4672

Data configurations

**Enable Personalized Advertising** ON  
Google Analytics audience lists and remarketing events/parameters will be published to the linked Google Ads accounts. You can change this setting anytime while maintaining your link for other purposes.

**Enable Auto-Tagging**  
Auto-tagging allows Analytics to associate Google Ads data automatically with customer clicks, enabling richer and more detailed reporting data than manual tagging across a number of Google Ads metrics and dimensions. Any Google Ads reporting features or ad units added in the future will only be available if auto-tagging is enabled.

[Previous](#) [Submit](#)

**Pro Tip**

**Google Signals for Demographics** - Another set-up integration you may want to consider is Google Signals. Enabling Google Signals will allow you to collect demographics data about your website users. If you enable this integration, make sure you have your privacy policy clearly stated on your website. The signals integration is available in your setup assistant.

Property settings

**Activate Google signals** >  
Include aggregated data from Google users who have turned on Ads Personalization. [Learn more](#)

Enable Google signals data collection

By activating Google signals, you enable Google Analytics to collect data about your traffic in addition to data collected through a standard Google Analytics implementation in order to provide additional features like cross-device audiences and insights.

When enabled, Google Analytics will collect visitation information and associate it with Google information from accounts of signed-in users who have consented to this association for the purpose of ads personalization. This Google information may include end user location, search history, YouTube history, and data from sites that partner with Google—and is used to provide aggregated and anonymized insights into your users' cross device behaviors. By enabling these features, you acknowledge you adhere to the [Google Advertising Features Policy](#), including rules around sensitive categories, have the necessary privacy disclosures and rights from your end users for such association, and that such data may be accessed and/or deleted by end users via [My Activity](#).

Note: Enabling the above toggle causes Google Analytics to automatically collect additional data about your traffic. If you don't want to collect data for Google signals, you should disable the toggle above as well as ensure that you have not **manually enabled** any Advertising Features data collection in your Google Analytics tags.

**Objective:** I have enabled the product integrations that I want to connect with GA4.

## Section 8:

# Stay Up to Date With the Latest GA4 Developments

Over the next year, GA4 is going to evolve rapidly. To stay up to date with the most recent changes to GA4, refer to the “What's New in Google Analytics 4” page.

### **"What's New in Google Analytics 4" page**

I recommend bookmarking the above page to ensure you get updates about the critical features that Google releases.

- Objective: Your skills are only as good as the nourishment you give them. Choose how you'll stay up to date with the latest developments in Google Analytics. And continue to build on what you accomplished today!

Thanks for following along with the Google Analytics Migration Checklist. Know this - by completing the checklist, you're much farther along than most at this early stage. GA4 is only going to get better. And, I believe that eventually, GA4 will revolutionize how we do website tracking and reporting.

Want to stay updated on more GA4 news and resources? Receive our email updates [here](#).

Feeling overwhelmed? Let's take a look where you're at and figure out a direction together.

[Claim my Free Consult](#)

I look forward to continuing our journey of digital marketing discovery together. Talk soon!

Your GA4 friends at ElementIQ

*DISCLAIMER: This is an original production of Jeff Sauer and his team at Data Driven U ([datadrivenu.com](http://datadrivenu.com)). They are leading experts in Google Analytics and at the forefront of supporting businesses and agencies to migrate to and embrace GA4. With the understanding that Analytics is the foundation to making better business decisions. We are proud clients and supports and endorsers of his approach.*

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