Odoo Migration Checklist

Complete Migration Workflow for Zero-Downtime Transitions

Document Information:

- **Version:** 2.1
- **Last Updated:** September 2025
- **Created by:** Aria Shaw
- **Purpose:** Step-by-step migration process with rollback procedures

Pre-Migration Phase (24-48 hours before)

Planning & Preparation

☐ 1. 🔘 Complete backup verification

- ☐ Full database backup completed and tested
- ☐ Filestore backup completed and verified
- ☐ Configuration backup created
- ☐ Test restore performed on staging environment
- ☐ Backup integrity checksums verified
- ☐ Off-site backup copy confirmed

☐ 2. 🔘 Document current system configuration

- ☐ Server specifications documented (CPU, RAM, storage)
- ☐ Installed modules list exported
- ☐ Custom modules and configurations catalogued
- ☐ Third-party integrations documented
- ☐ User access levels and permissions recorded
- ☐ Database size and performance baselines recorded

☐ 3. 🔘 DNS and network preparation

- ☐ Current DNS TTL reduced to 300 seconds (5 minutes)
- ☐ DNS propagation time calculated and planned
- ☐ SSL certificates prepared for new server
- ☐ Firewall rules documented and prepared
- ☐ Load balancer configuration (if applicable) prepared

☐ 4. 🔘 Rollback plan preparation

- ☐ Detailed rollback procedures documented
- ☐ Rollback timeline estimated (should be <30 minutes)
- ☐ Emergency contact list prepared and distributed
- ☐ Rollback triggers clearly defined

- ☐ Old server kept in standby mode
- ☐ Database rollback script tested

☐ **5. 🟡 Stakeholder communication**

- ☐ Maintenance window communicated to all users
- ☐ Business impact assessment completed
- ☐ Key stakeholders notified of migration timeline
- ☐ Support team briefed on migration process
- ☐ Emergency communication channels established

Technical Preparation

☐ **6. 🔴 New server environment setup**

- ☐ New server provisioned and configured
- ☐ Operating system updated and hardened
- ☐ Required software installed (Python, PostgreSQL, etc.)
- ☐ Performance benchmarks completed
- ☐ Security configurations applied
- ☐ Monitoring tools installed and configured

☐ **7. 🔴 Dependency and compatibility verification**

- ☐ Python version compatibility verified
- ☐ PostgreSQL version compatibility checked
- ☐ Custom module compatibility tested
- ☐ Third-party module compatibility verified
- ☐ Integration endpoints tested
- ☐ SSL certificate validity confirmed

☐ **8. 🟡 Migration tools preparation**

- ☐ Migration scripts tested on staging
- ☐ Data transformation scripts prepared (if needed)
- ☐ Performance monitoring tools configured
- ☐ Migration progress tracking system set up

Migration Day (2-6 hours execution window)

Phase 1: Pre-Migration Checks (30 minutes)

☐ **9. 🔴 Final system health verification**

- ☐ Source system health check completed
- ☐ All services running normally
- ☐ No critical errors in logs
- ☐ Database integrity verified
- ☐ Disk space sufficient for migration
- ☐ Network connectivity confirmed

☐ 10. 🔘 Team readiness confirmation

- ☐ All team members online and ready
- ☐ Communication channels tested
- ☐ Emergency procedures reviewed
- ☐ Go/no-go decision made
- ☐ Migration timeline confirmed

Phase 2: Data Export and Transfer (1-3 hours)

☐ 11. 🔘 Final backup creation

- ☐ Database export initiated with timestamp
- ☐ Filestore sync initiated
- ☐ Configuration files backed up
- ☐ Backup completion verified
- ☐ Transfer to new server initiated

☐ 12. 🔘 Service shutdown and data lock

- ☐ User notification sent (maintenance mode)
- ☐ Odoo service stopped gracefully
- ☐ Database connections terminated
- ☐ Final incremental backup completed
- ☐ Data consistency verified

☐ 13. 🔘 Data transfer verification

- ☐ Database import on new server completed
- ☐ Filestore transfer completed
- ☐ Configuration files applied
- ☐ File permissions set correctly
- ☐ Data integrity checksums verified

Phase 3: Service Configuration (1-2 hours)

☐ 14. 🔘 Odoo service configuration

- ☐ Configuration file updated for new environment
- ☐ Database connection parameters configured
- ☐ Worker processes configured for new hardware
- ☐ Log file locations configured
- ☐ Service dependencies configured

☐ 15. 🔘 Database optimization

- ☐ PostgreSQL configuration optimized for new hardware
- ☐ Database statistics updated (ANALYZE)
- ☐ Indexes rebuilt if necessary
- ☐ Connection limits configured
- ☐ Performance parameters tuned

☐ 16. 🔘 Security configuration

- ☐ Firewall rules applied
- ☐ SSL certificates installed and configured
- ☐ User permissions verified
- ☐ Database access restricted
- ☐ System users configured

Phase 4: Service Testing (30-60 minutes)

☐ 17. 🔘 Core functionality testing

- ☐ Odoo service started successfully
- ☐ Database connection established
- ☐ Login functionality tested
- ☐ Core modules functionality verified
- ☐ Custom modules tested
- ☐ User interface rendering correctly

☐ 18. 🔘 Integration testing

- ☐ Email delivery tested
- ☐ Third-party API connections verified
- ☐ Payment gateway connections tested (if applicable)
- ☐ Scheduled jobs verified
- ☐ Backup systems tested

☐ 19. 🔘 Performance validation

- ☐ Response times measured and acceptable
- ☐ Memory usage within normal limits
- ☐ CPU usage stable
- ☐ Database query performance verified
- ☐ Concurrent user load tested

Phase 5: Go-Live (15-30 minutes)

☐ 20. 🔘 DNS cutover

- ☐ DNS records updated to point to new server
- ☐ DNS propagation monitored
- ☐ Old server access logs monitored
- ☐ CDN cache cleared (if applicable)
- ☐ Load balancer updated (if applicable)

☐ 21. 🔘 Service monitoring activation

- ☐ Monitoring systems pointed to new server
- ☐ Alert thresholds configured
- ☐ Dashboard displays updated
- ☐ Performance monitoring activated

- ☐ Error logging confirmed working

☐ 22. 🔘 User notification and testing

- ☐ Migration completion announced to users
- ☐ User acceptance testing initiated
- ☐ Critical business processes verified
- ☐ User support channels activated
- ☐ Known issues documented and communicated

Post-Migration Phase (24-72 hours after)

Immediate Post-Migration (0-4 hours)

☐ 23. 🔘 System stability monitoring

- ☐ Continuous monitoring for first 4 hours
- ☐ Error rates tracked and acceptable
- ☐ Performance metrics within expected ranges
- ☐ User feedback collected and addressed
- ☐ Critical issues escalation path activated

☐ 24. 🔘 Integration verification

- ☐ All scheduled jobs running correctly
- ☐ Email notifications working
- ☐ Third-party integrations operational
- ☐ Payment processing verified (if applicable)
- ☐ Reporting systems functional

☐ 25. 🔘 Data validation sampling

- ☐ Random data integrity checks performed
- ☐ Critical business data verified
- ☐ User account access verified
- ☐ Financial data accuracy confirmed
- ☐ Historical data accessibility confirmed

24-Hour Validation

☐ 26. 🔘 Comprehensive system validation

- ☐ Full business cycle tested
- ☐ All user roles tested
- ☐ Reporting functionality verified
- ☐ Backup systems validated
- ☐ Security configurations verified

☐ 27. 🔘 Performance baseline establishment

- ☐ New performance baselines recorded
- ☐ Capacity utilization measured
- ☐ Response time benchmarks established
- ☐ Resource usage patterns documented
- ☐ Scaling triggers updated

☐ **28. 🟡 User feedback collection**

- ☐ User satisfaction survey deployed
- ☐ Issues and feedback catalogued
- ☐ Performance complaints investigated
- ☐ Feature availability confirmed
- ☐ Training needs identified

72-Hour Stabilization

☐ **29. 🟢 System optimization**

- ☐ Performance tuning applied based on usage patterns
- ☐ Resource allocation optimized
- ☐ Cache configurations tuned
- ☐ Database maintenance scheduled
- ☐ Monitoring thresholds refined

☐ **30. 🟢 Documentation updates**

- ☐ System documentation updated with new environment details
- ☐ User documentation updated for any changes
- ☐ Troubleshooting guides updated
- ☐ Emergency procedures updated
- ☐ Team access and credentials documented

☐ **31. 🟡 Legacy system decommissioning**

- ☐ Old server data securely archived
- ☐ Old server services shut down
- ☐ DNS records cleaned up
- ☐ Legacy monitoring removed
- ☐ Cost savings validated

Emergency Rollback Procedures

Rollback Triggers

Immediate rollback required if:

- ☐ System completely inaccessible for >15 minutes
- ☐ Data corruption detected
- ☐ Critical business processes failing
- ☐ Security breach identified

- ☐ Performance degraded >50% from baseline

Rollback Execution (15-30 minutes)

☐ 32. 🔴 Emergency rollback preparation

- ☐ Rollback decision documented with timestamp
- ☐ Team notified of rollback initiation
- ☐ Stakeholders informed of rollback
- ☐ Rollback start time recorded

☐ 33. 🔴 DNS rollback

- ☐ DNS records reverted to old server
- ☐ DNS propagation monitored
- ☐ Load balancer reverted (if applicable)
- ☐ CDN cache cleared

☐ 34. 🔴 Service restoration

- ☐ Old server services restarted
- ☐ Database connections verified
- ☐ Application functionality tested
- ☐ User access confirmed

☐ 35. 🔴 Rollback validation

- ☐ Critical business processes verified
- ☐ User notifications sent
- ☐ System monitoring restored
- ☐ Rollback completion time recorded
- ☐ Post-rollback stability confirmed

Post-Migration Checklist

Week 1 Tasks

☐ 36. 🟡 Performance monitoring review

- ☐ Weekly performance report generated
- ☐ Trending analysis completed
- ☐ Capacity planning updated
- ☐ Optimization opportunities identified

☐ 37. 🟡 User training and support

- ☐ User training sessions conducted (if needed)
- ☐ Support documentation updated
- ☐ FAQ updated based on user questions
- ☐ Support ticket trends analyzed

Month 1 Tasks

☐ 38. 🟡 Migration success assessment

- ☐ Migration objectives achievement measured
- ☐ Cost analysis completed
- ☐ Performance improvements documented
- ☐ Lessons learned document created
- ☐ Migration process improvements identified

☐ 39. 🟡 Infrastructure optimization

- ☐ Resource utilization optimized
- ☐ Cost optimization opportunities identified
- ☐ Scaling plans updated
- ☐ Disaster recovery tested

Migration Timeline Template

T-48 hours:

- Complete all pre-migration preparation
- Final stakeholder communication

T-24 hours:

- Final system health checks
- Team readiness confirmation

T-4 hours:

- Begin maintenance window
- Start data export

T-2 hours:

- Complete data transfer
- Begin service configuration

T-1 hour:

- Complete testing phase
- Prepare for go-live

T-0 (Go-Live):

- DNS cutover
- Service activation

T+4 hours:

- Initial stability confirmed

- Monitor and address immediate issues

T+24 hours:

- Comprehensive validation complete
- Performance baselines established

T+72 hours:

- System optimization complete
- Migration success confirmed

Emergency Contacts

Migration Team:

- **Migration Lead:** [Name] - [Phone] - [Email]
- **Database Administrator:** [Name] - [Phone] - [Email]
- **System Administrator:** [Name] - [Phone] - [Email]
- **Network Administrator:** [Name] - [Phone] - [Email]

Business Stakeholders:

- **Project Sponsor:** [Name] - [Phone] - [Email]
- **Business Lead:** [Name] - [Phone] - [Email]
- **End User Representative:** [Name] - [Phone] - [Email]

Technical Support:

- **Hosting Provider Support:** [Contact Info]
- **Odoo Partner/Consultant:** [Contact Info]
- **Emergency Escalation:** [Contact Info]

Quick Reference Commands

Service Management:

```
# Check Odoo service status
sudo systemctl status odoo

# Stop Odoo service
sudo systemctl stop odoo

# Start Odoo service
sudo systemctl start odoo

# Restart Odoo service
sudo systemctl restart odoo
```

Database Operations:

```
# Create database backup
pg_dump -U odoo_user -h localhost odoo_db > backup_$(date +%Y%m%d_%H%M%S).sql

# Restore database
psql -U odoo_user -h localhost -d odoo_db < backup_file.sql

# Check database size
sudo -u postgres psql -c "SELECT pg_size_pretty(pg_database_size('odoo_db'));"
```

System Monitoring:

```
# Check system resources
htop

# Check disk space
df -h

# Check network connectivity
ping target_server

# Check DNS resolution
nslookup domain.com
```

Success Criteria

Migration is considered successful when:

- ☐ All business-critical processes fully functional
- ☐ System performance meets or exceeds pre-migration levels
- ☐ All integrations working correctly
- ☐ Zero data loss confirmed
- ☐ User satisfaction level maintained
- ☐ All stakeholder requirements met
- ☐ Documentation complete and handed over
- ☐ Support team trained and ready

Migration Documentation:

- **Migration Start Time:** _____
- **Migration Completion Time:** _____
- **Total Downtime:** _____
- **Rollback Required:** Yes / No
- **Issues Encountered:** _____
- **Final Success Status:** Success / Partial / Failed

Sign-off:

- **Technical Lead:** _____ Date: _____
- **Business Lead:** _____ Date: _____
- **Project Manager:** _____ Date: _____

This checklist is based on best practices from 50+ successful Odoo migrations. Customize as needed for your specific environment and requirements.

Document Control:

- **Next Review Date:** [Post-migration + 30 days]
- **Version History:** Available in project documentation
- **Distribution:** Migration team, stakeholders, support team