

Pre-Migration Master Checklist

Environment Preparation (T-7 Days)

Infrastructure Readiness

- ☐ Target server provisioned and configured
- ☐ Network connectivity tested between source and target
- ☐ DNS entries created and tested
- ☐ SSL certificates installed and validated
- ☐ Firewall rules configured and tested
- ☐ Monitoring systems configured for new environment

Software Installation and Configuration

- ☐ Operating system updated and patched
- ☐ PostgreSQL installed with correct version
- ☐ Python dependencies installed and verified
- ☐ Odoo application installed (target version)
- ☐ Required system packages installed
- ☐ Service accounts created with proper permissions

Security Configuration

- ☐ Database encryption configured and tested
- ☐ SSL/TLS configured for all connections
- ☐ Access controls implemented and tested
- ☐ Audit logging enabled and functioning
- ☐ Backup encryption configured and tested
- ☐ Security monitoring tools deployed

Data Preparation (T-3 Days)

Source System Analysis

- ☐ Database size and structure analysis completed
- ☐ Custom module inventory and compatibility check
- ☐ Integration endpoints documented and tested
- ☐ User account audit and cleanup completed
- ☐ Data quality assessment performed

Backup Creation and Validation

- ☐ Full database backup created and verified
- ☐ Filestore backup created and verified
- ☐ Configuration backup created and verified
- ☐ Custom modules backed up and version controlled

- ☐ Backup restoration tested in staging environment
- ☐ Backup integrity verification completed

Testing Environment Setup

- ☐ Staging environment fully configured
- ☐ Test migration executed successfully
- ☐ Performance benchmarks established
- ☐ User acceptance testing completed
- ☐ Integration testing completed
- ☐ Rollback procedures tested and documented

Team Preparation (T-1 Day)

Communication Readiness

- ☐ Stakeholder notification sent
- ☐ User communication distributed
- ☐ Support team briefed and ready
- ☐ Emergency contact list updated
- ☐ Status page prepared for updates

Technical Team Readiness

- ☐ All team members briefed on migration plan
- ☐ Emergency procedures reviewed and understood
- ☐ Tool access verified for all team members
- ☐ Communication channels tested (Slack, phone, etc.)
- ☐ Backup technical resources identified and briefed

Business Readiness

- ☐ Business stakeholders available for testing
- ☐ Key users identified and prepared for validation
- ☐ Business processes documented for validation
- ☐ Acceptance criteria clearly defined
- ☐ Go/no-go decision criteria established