

OBSERVE BEFORE CHANGING

Odoo Project Health Checklist

For an existing Odoo environment that is difficult to use, repeatedly fails, or has a stalled implementation. Review business impact and evidence before selecting remediation.

01 Trace

Follow the record.

02 Verify

Use safe evidence.

03 Prioritize

Choose the next action.



A practical, evidence-led guide for business owners and teams

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Trace the work and the records behind it

Start with one important transaction and follow it through Odoo and any connected tools. Record what the evidence shows, including where the process depends on a person or a separate file.

H01	Critical workflow	A representative transaction can be traced from its starting request to its agreed end state.
H02	Exceptions	Partial delivery, cancellation, rework, rejection, and other relevant exceptions have defined routes.
H03	Work outside Odoo	Spreadsheets, messages, or duplicate entry used for essential work are identified and explained.
H04	Source ownership	Conflicting systems or records have an agreed authoritative source and reconciliation owner.
H05	Data integrity	Samples show required fields, references, quantities, and statuses are coherent; discrepancies are recorded.
H06	Financial follow-through	Relevant orders, invoices, payments, or balances reconcile under a qualified business owner.
H07	Integration handoffs	Transfers can be traced; failures, duplicates, and delayed messages have a visible recovery owner.
H08	Documents and reports	Outputs match their source records and the business meaning of displayed fields.

EVIDENCE HANDLING

Use masked references and the minimum evidence needed. Do not paste credentials, customer records, sensitive logs, or correct operational or financial data as part of this checklist.

ONE OBSERVED FAILURE / RECORD REFERENCE / EXPECTED RESULT / ACTUAL RESULT

Review technical operating controls

Ask the authorized technical owner for evidence. Keep the review read-only; do not perform operational tests that could change access, records, integrations, or production load.

H09	Environment inventory	Version, edition, deployment, installed modules, custom code, and external services are known.
H10	Maintainability	Each extension has a source or supplier, dependency record, and responsible maintainer.
H11	Access boundaries	Authorized tests verify permitted and denied actions, including cross-company access if relevant.
H12	Recovery evidence	Backup scope covers required database, files, and configuration; an isolated restore has dated validation evidence.
H13	Operational visibility	Errors, failed jobs, storage capacity, and critical service interruptions reach a responsible person.
H14	Performance evidence	Slow tasks have timestamps, affected users, workload context, and reproducible steps before tuning is proposed.
H15	Safe release process	Changes are tested in isolation; release approval, rollback, and recovery responsibilities are defined.
H16	Upgrade constraints	Custom modules and integrations are reviewed for the target; representative business tests are planned.

KEEP THIS REVIEW READ-ONLY

Do not restore over production, disable controls, run load tests, change permissions, or send live integration messages to complete this workbook.

MOST IMPORTANT UNKNOWN TECHNICAL DEPENDENCY / OWNER

Separate urgent issues from improvement requests

Prioritize by consequence and evidence, not by how easy an item is to fix. An unknown is not a pass; its priority depends on what happens if the control is absent.

H17	User task confidence	Representative users can complete critical tasks and explain the relevant exception route.
H18	Guidance	Instructions match the current workflow and identify who maintains them.
H19	Support ownership	Requests have a channel, impact assessment, next action, and escalation owner.
H20	Acceptance history	Open project deliverables, acceptance decisions, and unresolved defects are recorded separately.

PRIORITY	SUGGESTED INTERPRETATION	NEXT STEP
Critical	Active exposure or data loss, or critical work unavailable with no safe workaround.	Escalate immediately; preserve evidence.
High	Repeated critical failure, or recovery/access unknown with material exposure.	Prompt technical review; agree containment and owner.
Medium	Recurring friction with a usable workaround and bounded impact.	Schedule evidence-led remediation and acceptance tests.
Improvement	Desired capability or usability refinement without a current control failure.	Prioritize in the improvement backlog.

URGENT ROUTE

Suspected unauthorized access, ongoing data loss, or inability to perform critical work should go to the responsible technical or incident-response team. Preserve evidence and avoid unreviewed fixes.

ISSUE SELECTED / PRIORITY / REASON / SAFE WORKAROUND, IF ANY

04 / FINDINGS AND NEXT ACTION

Create a remediation brief the team can use

Keep one issue tied to one evidence trail. Separate the symptom from the cause, assign the investigation, and define what proof will show the next action worked.

FIELD	COMPLETE FOR THE HIGHEST-PRIORITY ISSUE
Issue ID / workflow	
Observed vs. expected	
Evidence / date / sample	
Impact / priority	
Owner / next review date	
Proposed safe next action	
Acceptance proof	

SYMPTOM IS NOT A ROOT CAUSE

Example: an invoice is not created after a workflow step. That is an observation. A failed integration, missing field, or configuration issue remains a hypothesis until evidence confirms it.

SELECT THE NEXT ENGAGEMENT**STABILIZE**

Critical operation or control needs attention.

DIAGNOSE

Cause or dependencies remain unclear.

OPTIMIZE

Core workflow is stable; evidence supports a bounded improvement.

DECISION / OWNER / NEXT REVIEW DATE

**ODOO SYSTEM HEALTH REVIEW**innovansis.com/contactus

Framework: original InnovanSIS guidance; not an official Odoo score.

Odoo reference: odoo.com/documentation

INNOVATION & SYSTEMS

From business vision to intelligent execution

InnovanSIS helps organizations turn business priorities into clear processes, capable teams, and connected technology.

WHO WE ARE

A practical partner for better operations

We start by understanding how work moves through the business. Then we help shape the processes, responsibilities, and systems that make execution easier to see, manage, and improve.

01

Clarify the work

Map the handoffs, decisions, and information your team needs to deliver consistently.

02

Connect the system

Use Odoo ERP to bring core workflows and business information into a shared operating environment.

03

Enable the team

Give people practical roles, routines, and guidance to put the new process into daily use.



ODOO ERP

Technology should support the way work needs to happen.

InnovanSIS approaches Odoo as an adaptable platform for connected operations. The focus is on fit: define the process, configure the system around it, and help the team adopt it.

"Every great business starts with a vision, a vision to make profits, to innovate, a vision to grow, and to make a lasting impact. But the truth is, a vision alone is not enough. Success comes when we transform that vision into action, fueled by streamlined processes, empowered teams, and smart technology. That's where Odoo ERP becomes a game-changer. It's not just software; it's a gateway to operational excellence."

Armando Robert Lobo
Founder & CEO, InnovanSIS LLC

