

CASE STUDY

From OpenText to Full Microsoft 365 Control

How a U.S.-based benefits administrator migrated 4 TB and 4 million documents to SharePoint in one weekend



Challenge

Migrating 4 TB and 4 million documents from OpenText Content Server to SharePoint while preserving governance and minimizing business disruption.

Solution

A full migration approach combining content analysis, SharePoint architecture and mapping, governance design, and a single-weekend cutover.

Result

A faster, fully governed Microsoft 365 environment with native collaboration, simplified IT operations, and the legacy OpenText platform retired.

From structured ECM to slowing legacy

For a U.S.-based health and financial benefits administrator, enterprise content is business-critical. The organization manages health insurance, pensions and financial benefits for a large parent organization and its affiliated companies. That makes secure, reliable access to documents essential.

About ten years ago, the company selected OpenText Content Server to move away from file shares and bring more structure to its content management. But over the years, the company became increasingly invested in Microsoft 365. SharePoint was already available, employees were working in Microsoft tools every day, and maintaining a separate legacy ECM platform became harder to justify.

The goal was clear: move from OpenText to SharePoint, preserve governance and create a faster, more integrated Microsoft 365 environment.

When “good enough” was no longer good enough

The customer had already tried to optimize OpenText. External specialists reviewed the setup

“All the other services we looked at were just their tool. Xillio helped us with the full breadth of the project: analyzing what we had, determining what it needed to look like in SharePoint and making sure it was set up the right way from the start.”

and tuned what they could, but eventually concluded that the system was performing as well as it could. For the customer, that was the real turning point: if this was the best possible version of OpenText, it was not good enough for the future.

Users felt the limitations every day. Opening documents could take several seconds, sometimes longer. Larger content movements could slow the system down significantly. Collaboration required workarounds rather than native Microsoft 365 functionality.

At the same time, governance remained a major concern. OpenText had helped the organization structure content and manage permissions carefully. Executives did not want SharePoint to become a sprawling environment with uncontrolled sites, unclear ownership and inconsistent access.

In other words, the challenge was not just to migrate 4 TB and 4 million documents. It was to translate a carefully governed OpenText environment into SharePoint without recreating old complexity.

Beyond tooling: choosing the right partner

The customer explored several migration solutions, but many vendors mainly offered tooling. Xillio stood out because it could support the full journey: analyzing the OpenText environment, helping determine what the SharePoint structure should look like, supporting the mapping process and executing the migration itself.

Our partner Y Modernize supported the SharePoint architecture and setup. Together, the teams helped define what should become a department site, when a project site made more sense and how existing collaboration spaces could be translated into SharePoint and Microsoft Teams.

Originally, the customer planned to migrate content in several waves over multiple weeks. Closer to go-live, the team realized this would create unnecessary risk: users might continue changing content in OpenText after part of it had already

moved. Xillio advised a cleaner approach: one full weekend cutover.

The content migration itself went smoothly. A few folders were missed during the initial extraction, but Xillio quickly re-ran the extraction, identified the missing content and completed the remediation.

Faster access, stronger control

After the migration, all OpenText servers were shut down. The organization no longer had to maintain a separate legacy ECM platform alongside Microsoft 365, reducing both cost and operational burden for IT.

For users, the biggest improvement was speed. Documents that previously took several seconds to open now appear almost instantly in SharePoint. Employees can now use OneDrive and Microsoft 365 co-authoring natively, instead of relying on OpenText add-ons and web-based workarounds to collaborate.

More importantly, the organization retained full control. The project team translated the useful governance principles from OpenText into SharePoint and defined clear rules for department sites, project sites and site creation. The result is a modern Microsoft 365 content environment that is faster, easier to use and still clearly governed.

Hands-on user support to boost adoption

To support adoption, the customer and Y Modernize organized three two-hour SharePoint training sessions, followed by additional sessions on how the organization uses SharePoint in practice. The internal IT team also provided hands-on support after go-live, helping users at their desks and on calls.

After about a month, SharePoint had become part of the normal routine: users could find their content, work faster and collaborate in the Microsoft environment they already knew. For a

“Decommissioning OpenText was a clear business win: lower costs, fewer headaches for IT and a content environment that finally fits the customer’s Microsoft 365 strategy.”

migration involving 4 million documents, that is a strong signal: the transition had landed.

Adoption driven by visible improvement

The speed of the new environment helped users accept the change. SharePoint did not simply replace OpenText; it solved frustrations employees had been dealing with for years. Documents opened faster. Collaboration became easier. Content lived in the Microsoft environment users already worked in every day.

That visible improvement made adoption easier. The migration did not feel like another IT project pushed onto the business. It felt like a practical step forward.

About Xillio

These days, your organization needs to be agile to stay relevant. The same goes for your enterprise content. But where to start? The more complex your enterprise content, the more daunting it seems to take the leap.

That’s where we come in. With over 20 years of experience, Xillio is your trusted partner for managing complex, high-volume content migrations within the Microsoft ecosystem. From metadata transformation to link redirection, our experts ensure your move to Microsoft 365 is smooth, compliant, and future-proof.



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