

CASE STUDY

OpenText to SharePoint Migration: 10.3M Financial Records Migrated Successfully



Challenge

Migrate 10+ million financial records from OpenText Content Server to Microsoft SharePoint while maintaining compliance and business continuity

Solution

Strategic partnership between Xillio and Y Modernize, delivering content extraction, SharePoint architecture, and delta migrations

Result

- 10.3 million items migrated across 24 SharePoint sites
- Zero business disruption during migration
- Full regulatory compliance maintained
- Project completed within budget
- Improved accessibility for 26,000+ partner workshops

The Challenge: Legacy Content Modernization for Financial Compliance

A leading Australian automotive financial services provider needed to modernize their enterprise content management system. Serving over 26,000 body shops and repair workshops, the organization processes thousands of credit card-style payment transactions monthly, with all financial records stored in OpenText Content Server.

The decision to migrate to Microsoft 365 was driven by:

- **Cost reduction** through cloud infrastructure
- **Enhanced collaboration** via Microsoft 365 tools
- **Improved scalability** for growing operations
- **Better integration** with modern business applications

Why Xillio Was Selected

"They appreciated the trust we built during the sales phase and the clarity of our documentation," recalls Ruud de Wolf, Global Sales Lead at Xillio. "Our proven track record in large-scale OpenText migrations and ability to guarantee compliance throughout the process made the decision easy."

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Ruud de Wolf, Global Sales Lead at Xillio

Partnership Approach

The migration project combined expertise from two Microsoft ecosystem specialists:

- **Xillio:** Content extraction, analysis, and migration execution
- **Y Modernize (YMD):** SharePoint information architecture design (led by Microsoft MVP Alistair Pugin)

"We've worked together for years," explains Frederick Weideman, Senior Migration Specialist at Xillio. "This collaboration allowed us to focus on what we do best while ensuring a cohesive end result."

Migration Scope and Methodology

Content Volume:

- 10.3 million content items
- 24 SharePoint sites
- 170+ document libraries

Metadata Transformation:

- One-to-one mapping for most fields
- Conversion of free-text fields to taxonomy-based terms
- Enhanced governance and consistency in SharePoint

Proof of Concept

Before full-scale migration, the team validated all tooling and processes through a controlled POC, ensuring technical readiness and stakeholder alignment.

Cross-Timezone Coordination

Despite an 8-hour time difference between Europe and Australia, the teams turned geographic separation into an advantage:

"We'd start the migration on Friday morning, our time—when their workday was ending—and they

could validate results during their evening," Frederick explains. Daily communication ensured rapid issue resolution and continuous progress.

Ensuring Business Continuity and Regulatory Compliance

Delta Migration Strategy

To prevent business disruption, Xillio implemented incremental delta migrations that synchronized OpenText and SharePoint throughout the project. Each delta included thousands of new financial statements, ensuring:

- Real-time data availability
- No loss of business continuity
- Smooth transition for end users

Compliance and Chain of Custody

"Every migration we do must preserve the chain of custody," the customer's project manager explains. "That means timestamps, referential integrity, and full traceability before, during, and after migration."

The migration maintained:

- Complete audit trails for all financial documents
- Timestamp preservation across all records
- Referential integrity between linked content
- Microsoft 365 security, including built-in access control and cloud security features

Managing Integration Complexity

The client's development team was simultaneously building integration layers to connect SharePoint with multiple business applications. While not Xillio's direct responsibility, the team provided ongoing guidance on Microsoft 365 best practices to support successful integration.

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Project Results: On-Time, On-Budget Success

Despite external dependencies and integration complexities, the migration was completed successfully:

- All 10.3 million items migrated accurately
- Zero business disruption during transition
- Full compliance maintained throughout
- Budget targets achieved
- Enhanced accessibility for 26,000+ workshops

"The project management was excellent," Alistair notes. "We knew exactly when to accelerate and when to slow down."

Key Lessons for Financial Content Migrations

1. Early Stakeholder Involvement

Engage all technical teams—especially integration specialists—at project inception. "When multiple systems connect to your new platform, testing becomes even more critical," says Ruud de Wolf.

2. Delta Migrations for Business Continuity

Incremental synchronization ensures live systems remain operational throughout the migration process.

3. Collaborative Expertise

Combining migration specialists with platform architects delivers superior outcomes in complex environments.

4. Compliance by Design

Build a chain of custody preservation and regulatory requirements into every phase of the migration plan.

Future-Ready Content Management in Microsoft 365

By partnering with Xillio and Y Modernize, the client achieved:

- Modern, cloud-based content management
- Scalable infrastructure ready for growth
- Enhanced automation opportunities within the Microsoft ecosystem
- Improved collaboration tools for the nationwide workshop network
- Reduced operational costs through cloud efficiency



About Xillio

Your Microsoft 365 Migration Partner

With over 20 years of experience, Xillio specializes in managing complex, high-volume content migrations within the Microsoft ecosystem. Our expertise includes:

- OpenText to SharePoint migrations
- Metadata transformation and optimization
- Link redirection and URL management
- Compliance and regulatory preservation
- Delta migration strategies
- Large-scale enterprise content management

Whether you're migrating from OpenText, Documentum, FileNet, or other legacy systems, Xillio ensures your move to Microsoft 365 is smooth, compliant, and future-proof.

Ready to Modernize Your Enterprise Content?

Learn how Xillio can help your organization migrate to Microsoft 365 with confidence. Contact our migration specialists to discuss your project requirements.