

How to Set Up Auto Email Capture

In order for a user to start using Migration Manager's automated Email Capture, that user must first activate the service. The following article shows you how to set up Auto Email Capture.

Note that this article covers the basics of how to setup auto capture - for full details on what all of the different functions do, please read: [Understanding the User Email Capture Settings](#)

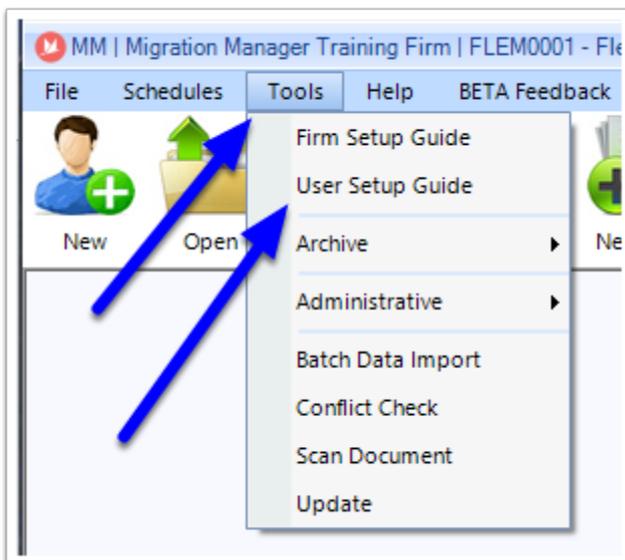
! Note: For Email Capture to run, you must first install Microsoft Outlook and have it configured to read your company's Mailbox. Migration Manager's Support does not cover the installation or configuration of Microsoft Office. For technical assistance with Microsoft products such as Outlook, contact your IT Support.

1. Open the Email Capture Settings

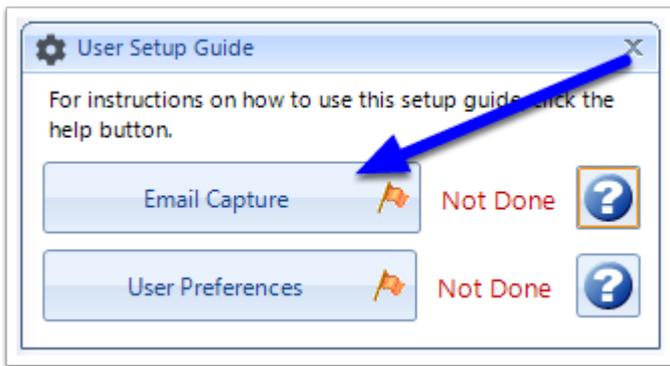
You can activate Email Capture via either the User Setup Guide or the Email Capture window.

1.1. Via the User Setup Guide

First Go to **Tools > User Setup Guide**

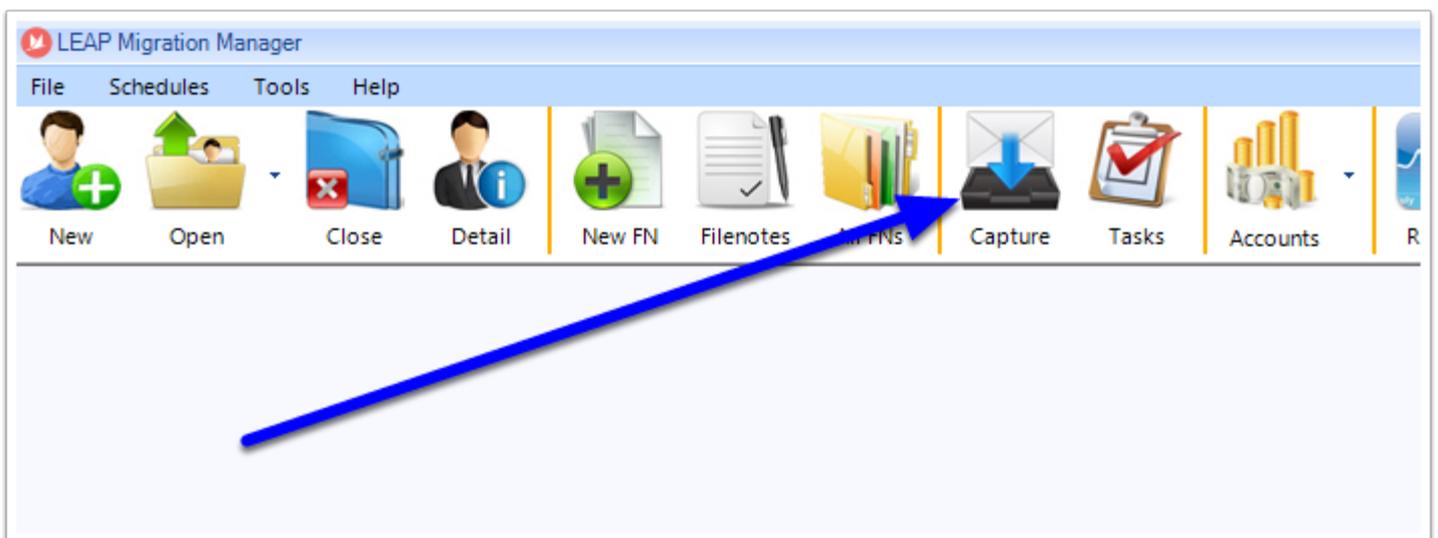


Click on the **Email Capture** button

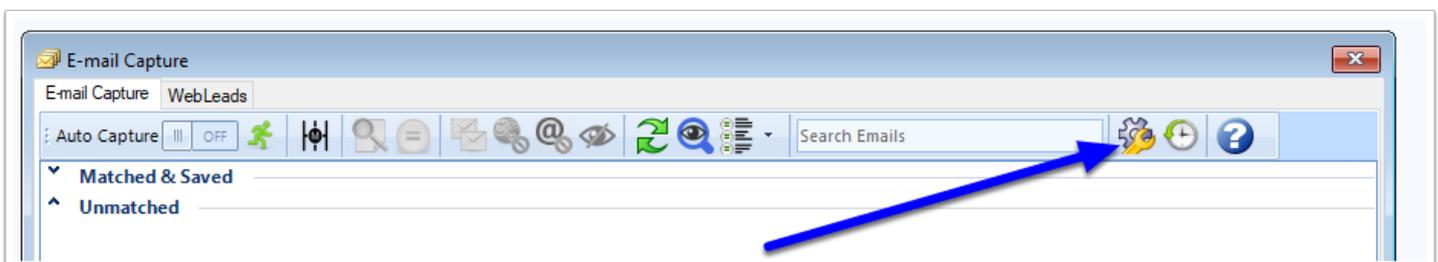


1.2. Or via the Email Capture window

To open the Email Capture window, click the Capture button.



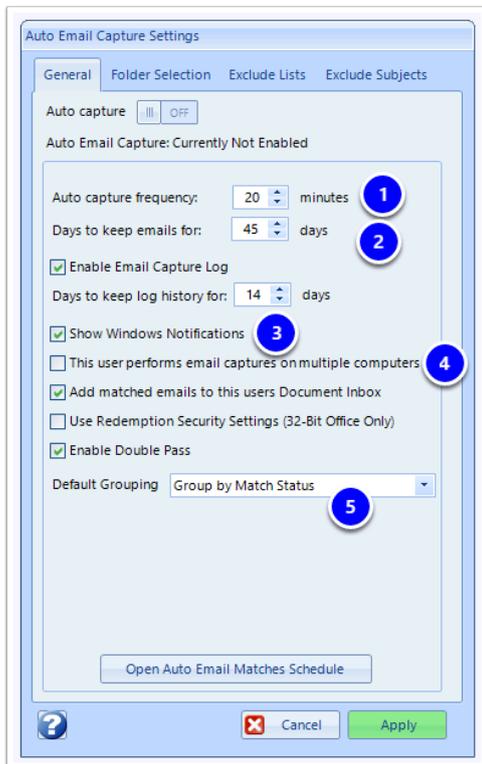
Click the Settings icon



2. Set the basic Auto Capture options

The Auto Email Capture Settings window will now open and you can set the basic settings

Note to get set up and start that you only need to set the following basic settings. Other more detailed settings which can be altered at a later time are covered under: [Understanding the User Email Capture Settings](#)



2.1. Set the Frequency of the Auto Capture

The frequency setting determines how often the Automated Email Capture service will run. By default it is set to run every 20 minutes but you can increase or decrease that frequency. Note that the most frequent it can run is every 5 minutes. If you have an old/slow computer it is recommended that you either leave the settings as is, or that you decrease the frequency. When turned on, whilst the user is logged in to Migration Manager the Automated Email Capture service will operate in the background at this set time interval to perform the following steps:

1. It will capture and copy all emails and attachments from Outlook which have been sent and received since the last capture was performed;
2. It will assess each of the newly captured emails to determine if they can be automatically assigned to a matter in Migration Manager;
3. It will assess each of the emails which have previously been captured over the last 45* days to determine whether there is any new information which has been entered or updated in to Migration Manager which would now allow these emails to be assigned (i.e. a matter might have been updated with Department reference numbers, in which case if there is an email which contains this Department reference number in the subject line it will now be assigned to that Matter)
4. Emails which have been assigned, will now be copied to the *Documents* tab of the relevant matter.

2.2. Specify how long the captured emails will remain in the Capture window

The "Days to keep emails for" setting determines how long Migration Manager will keep a copy of the email in the Email Capture window. Whilst a copy of an email remains in the Capture window, Migration Manager will constantly assess that email to determine whether or not it should be assigned to a relevant Matter. At the end of the time period the email is removed from the Capture window.

i At the end of the time period the email will not be deleted from a matter if it has been assigned. It is just removed from the Capture window. Emails which have not been assigned will be removed completely from Migration Manager. This feature does not affect the emails in Outlook in any way.

2.3. Turn Windows notifications On or Off

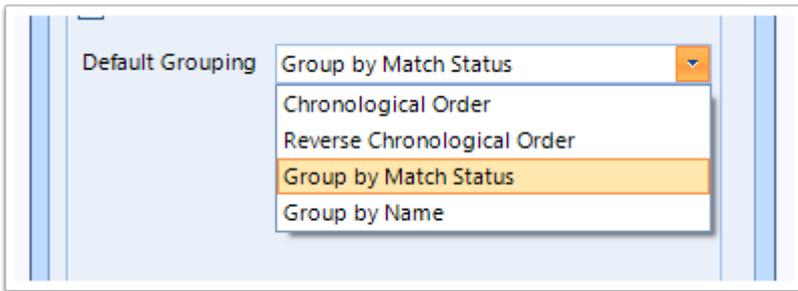
Every time Migration Manager runs the email capture service, if it actually captures an email or is able to assign an email that has previously been captured (due to new information), then your computer will display a notification via the Windows Notification centre. Untick this option to turn these notifications off.

2.4. Allow this user to perform email captures on multiple computers

If a user uses Migration Manager on multiple computers, please make sure that this option is ticked so as to ensure that Email Capture is synced between the various computers. If a user does not work on multiple computers this option can be unticked.

2.5. Default Grouping

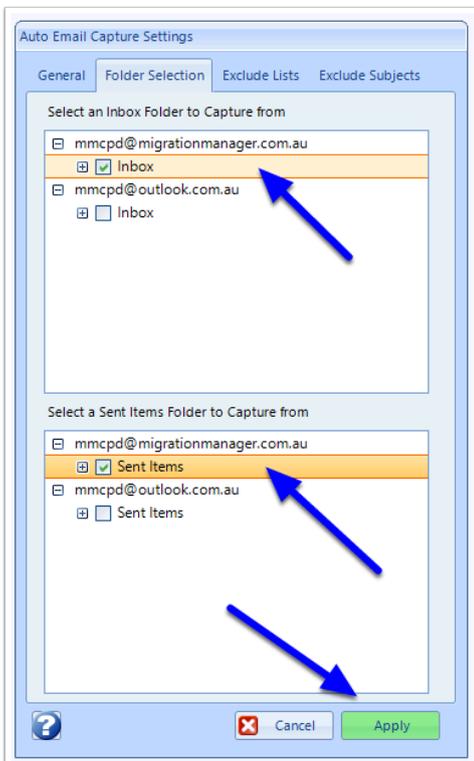
This setting controls how emails are grouped in the capture window. To begin with it is recommended that they be grouped by Match Status.



3. Select the Outlook folders which are to be captured

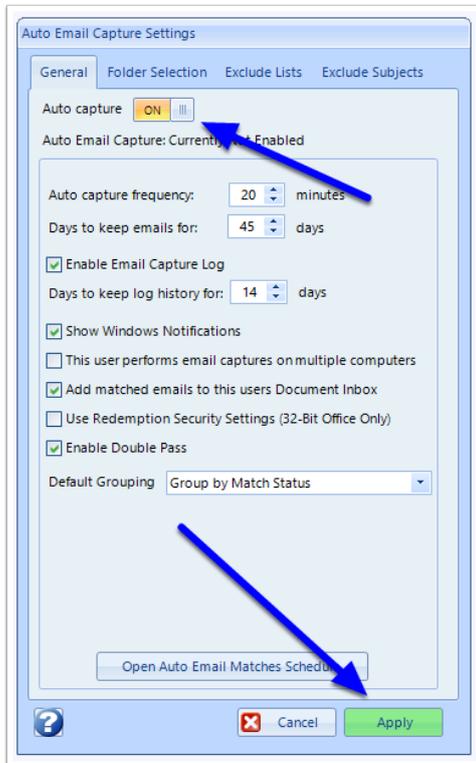
In the Folder Selection window, you need to choose which email accounts you want Migration Manager to monitor, and from those accounts, which Inbox and Sent folders are captured from. Note that Migration Manager can monitor your Inbox and your Sent folders from multiple accounts. When you have selected the relevant folders click 'Apply'.

i Migration Manager can capture emails from the Inbox and Sent folders and any subfolder of these root folders. However Migration Manager can not monitor and capture emails which are saved in any other folders that are not part of the Inbox or Sent item folder structure.



4. Turn Auto Capture On

To finish turning on capture, slide the Auto Capture switch to the 'On' position and then click Apply.



5. Email Capture is now operating

Migration Manager's Email Capture service will now regularly monitor and capture emails from your selected email folders.

Video Guide