

Understanding Email Capture - FAQs

Migration Manager Automated Email Capture system is designed to significantly reduce the amount of time and effort required by Migration Agents, Lawyers and their support staff to save their email correspondence to their client Matters.

To help you understand a bit more about this new feature, we have put together the following Frequently Asked Question and Answer guide about the new Automated Email Capture service:

QUESTION: WHY IS EMAIL CAPTURE IMPORTANT?

Answer: Email Capture is a very important tool for ensuring that all users are saving a copy of their correspondence with clients and relevant parties to their respective Client Matters. When an email is captured, matched and saved by Migration Manager, that email and any attachments are copied out of Outlook and saved as separate files on your computer/server. This process serves a number of purposes including:

1. it ensures that Outlook is no longer the only place that you have this email saved and acts as a form of backup should anything happen to the email in outlook;
2. it enables you and your staff to be able to find all of the relevant correspondence about a matter in one location. You no longer have to go and search through different people's Outlook looking for a particular email;
3. you no longer need to waste time filing and sorting emails into folders in Outlook or spend time creating complex filter rules;
4. you no longer need to go and manually extract and save each and every attachment from an email. The capture process does that for you.

QUESTION: HOW DOES THE AUTOMATED EMAIL CAPTURE SERVICE WORK?

Answer: Once [activated](#), whilst the user is logged in to Migration Manager the Automated Email Capture service will operate in the background at the set time intervals (usually every 20 minutes) performing the following steps:

1. It will monitor Outlook and 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 matched 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 matched (i.e. a matter might have been updated with Department File Numbers, in which case if there is an email which contains this Department File Number in the subject line it will now be assigned to that file)
4. Matched emails are copied to the relevant matter and can be accessed via that Client's Documents tab or the Browse button.

Your involvement with the capture system will be to check what has been captured and review those items which were not automatically matched to a matter and manual match these items where necessary.

QUESTION: WHY HAS MIGRATION MANAGER MOVED TO A NEW AUTOMATED EMAIL CAPTURE SYSTEM?

Answer: One of the biggest problems we found with the previous manual capture system was the fact that it was a manual process that required each user to regularly run a capture, assign emails and post/save those emails to their matters. If users were diligent and did this process on a regular basis then the email capture process was a relatively quick task. However we generally found that most users did not regularly capture emails and therefore when they did, they would often have days or weeks worth of emails to go through. Or even worse, they would just regularly use the selective email capture tool which often resulted in relevant emails being overlooked and matters being incomplete. Automated Email Capture aims to solve the biggest problems of email capture - human nature.

The Automated Capture Service works constantly in the background monitoring a users Inbox and Sent folders in Outlook, capturing emails that are sent and received, matching emails where it can identify them and then saving those emails to the relevant files in Migration Manager. By automating these process, the users need to do anything is significantly reduced in fact once setup, the only real involvement a user has is to occasionally check the capture window to see if there are any emails which were not automatically matched. And the best part is, the more you use Migration Manager to generate and send emails, as well as recording relevant information on the file such as Department File Number and email address, the smarter the Automated Capture Service becomes and less you need to check for unmatched emails.

QUESTION: DO YOU HAVE INSTRUCTIONS ON HOW TO USE THE NEW AUTOMATED EMAIL CAPTURE?

Answer: Yes we do. We are currently in the process of building a new, easier to use instruction manual and the new instructions for the new Automated Email Capture service are amongst the first articles to be published. We recommend you have a read of the following guides:

- How to [Activate Auto Email Capture](#);
- [How to Capture, Match and Save Emails](#); and
- [Understanding the Email Capture Toolbar](#).

QUESTION: WHY DO YOU CAPTURE ALL OF MY EMAILS?

Answer: All emails are captured so that Migration Manager can assess all of those emails to determine if there is a match to a relevant matter. Furthermore over the next 45 days, Migration Manager will constantly reassess each of the unmatched emails to determine if there is any new information available which would allow a match to be made.

QUESTION: IS THERE A WAY TO INCREASE THE NUMBER AND EFFECTIVENESS OF AUTOMATIC MATCHES?

Answer: Yes. The Automated Capture Service looks for the following parameters in the following order when trying to perform a match: (1) the Matter ID in the subject line; (2) a unique Departmental File Number in the subject line; (3) a unique Alternative Reference Number in the subject line; (4) a unique Primary Applicant's email address. If the Automated Capture Service can detect any of these parameters in an email, it will be able to automatically match and save the email to the relevant matter.

Taking the following steps will significantly increase how well the automated matching occurs:

1. Generate and send emails using Migration Manager. Doing this will ensure the Matter ID is being added to the subject line of the email;
2. Save Department File Numbers in to the Dept tab of each matter;
3. Record the Primary Applicant's email addresses on their files.

And remember that the Automated Capture Service will reassess old emails from the last 45 days to see if it can find a match from any eligible information you update to a file.

QUESTION: WHY DOES EMAIL CAPTURE KEEP A COPY OF MY EMAILS FOR 45 DAYS?

Answer: So that the Automated Capture Service has the opportunity to constantly reassess those emails to look for a match based on any new information added to a file. A common scenario is that you might finally create a file for someone who has previously been in contact with you the Automated Capture Service will be able to detect all of these previous correspondence and automatically match and save it for you. The 45 days also gives you an opportunity to review any unmatched emails and perform any manual matches that might be necessary.

QUESTION: WHAT HAPPENS TO EMAILS RECEIVED BY MULTIPLE PEOPLE IN THE FIRM I.E. EMAILS WHICH HAVE BEEN CC'D TO EVERYONE?

Answer: The Automated Capture Service will capture and match those emails for each person and save a copy to the file. However when you look in the Documents tab of that file you will only see one copy as of version 8.2, the Documents tab has a de-duplication function that hides all duplicate emails and documents. Note that a copy of each of those emails will still be saved to your server and can be accessed via the Browse window (we don't presume to delete anything), but you will not see these duplicates via the Documents tab.

QUESTION: WHAT HAPPENS IF I DELETE THE EMAIL FROM OUTLOOK?

Answer: If you delete the email from Outlook after Migration Manager has performed its capture, the deletion will not affect the copy of that email saved in Migration Manager. If you delete the email before the capture occurs then Migration Manager will have never seen that email.

QUESTION: CAN I EXCLUDE CERTAIN EMAILS FROM BEING CAPTURED?

Answer: Yes you can. If you receive certain emails that you never want the Automated Capture service to capture, you can choose to exclude those emails either via their Domain (which will block all emails which come from that domain i.e. blocking the domain @gmail.com will block all emails sent by anyone using a gmail account) or exclude via just their email address. In the future any emails which come in to Outlook which are on the domain or email exclusion lists will not be captured and copied to Migration Manager. Note that any emails which are excluded can never be assess by Migration Manager for a future match, so use these tools carefully.

QUESTION: DOES IT CAPTURE MY SPAM FOLDER

Answer: No. The Automated Capture Service can only capture your Inbox and Sent folders and any subfolders of those folders. If an email ends up in your Spam folder it will not be captured. Also note that if an email is moved out of the Spam folder and in to your Inbox after a capture has taken place, you may need to use the manual selected email capture tool to get this email in to Migration Manager.

Question: CAN I HAVE THE OLD EMAIL CAPTURE BACK?

Answer: No. It has been assigned to the dustbin of programming history. There is a manual capture tool available via the toolbar in the Capture window. The primary use of this is for manually capturing emails from before you have turned on the automated capture service. Once the emails have been manually captured, the Automated Capture Service will still kick in to automatically assess, match and save those emails to their respective files. We do not recommend that you use the manual capture regularly as you will lose all of the benefits of the Automated Capture Service.