



Cleaning Out Your Outlook Mailbox



Why Clean Out Your Outlook Mailbox?

Email is vulnerable to hackers

If someone in the company clicks on an attachment containing malware, it is possible for the hacker, if not stopped by our security, to get access to every email account in our system. Alliant's data and our clients' data are then exposed.

Alliant may not be the actual target

Alliant works with a variety of clients. Some are large and prominent corporations and others are government entities. Our clients may be the actual target of an attack and Alliant is simply the vehicle into their systems. We have an obligation to protect our clients' information.

Teammates need access to your work

If a teammate won the lottery, would they return to work to clear out email and attach everything in its proper place? What if a colleague is on vacation? Everything in Outlook should either be filed in our systems, so your team can see it, or deleted.

Maintain our personal privacy

We are in our Alliant email every workday, and it is easy to blur the lines between business and personal correspondence. Clearing out emails from friends and family, a tax person, a child's teacher, or any other personal communication will protect personal privacy.

Get started!

Put the following steps into practice and be diligent about protecting Alliant, our clients, and your personal data. Regular maintenance will keep everyone's data secure.



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Ways to Clean Up Your Outlook Mailbox

1 Before starting, here's a quick and easy tip!

Use this easy tip to move email and delete it all in one step. This works only when email moves into an Alliant system. It works in EPIC and other Alliant applications, for shared drives, and for home drives.

A. Shift, Drag, and Delete

1. Hit the Shift key.
2. Select the email(s) to be moved and deleted.
3. Hold down the Shift key, drag the email(s) to the new location.
4. Email is automatically deleted from Outlook when it moves.

Ideaforce in Action

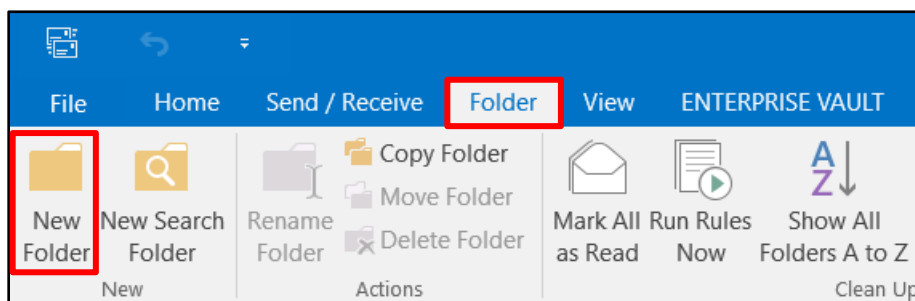
Thanks to Jayme Moreno of the Professional Development team for this valuable tip!

[Learn more](#) about Ideaforce.

2 Use the Rules function to locate sensitive data

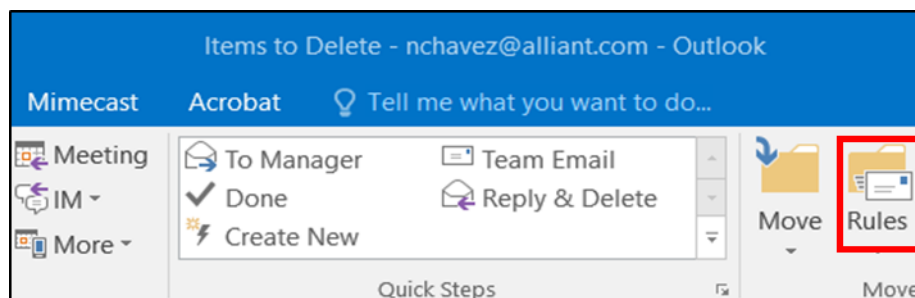
Use the Rules function to identify sensitive data quickly and easily.

- A. Create a New Folder where email will be moved by the Rule.
- B. Click on the "Folder" tab.
- C. Click "New Folder."
- D. Name your folder something easy for you to identify.



E. Create a Rule that will move email into the new folder.

1. From the "Home" tab, click on "Rules."
2. From the dropdown (not shown), select "Create Rule."





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3. Select "Advanced Options."

- F. Select the conditions for the rule:
 1. Check "With _____ in the subject or body."
 2. Make changes in Step 2 at the bottom. (Recommended words to search follow.)
 3. Click on "Subject."
 4. Enter two words to search. The rule can later be modified with new words.
 5. You will see data from the most recently handled email; ignore it.
 6. When finished, click "Next."



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Suggested words for creating rules:

If you service clients, add:	If you are a manager, add:	If you use personally, add:
<ul style="list-style-type: none">• MVR• DL#• Driver License• Driver List• Census• SSN	<ul style="list-style-type: none">• Social Security• Salary• Employee List• Budget• Financial• Enrollment	<ul style="list-style-type: none">• Taxes• Investments• Mortgage• IRS

G. What do you want to do with the message?

1. Check "move it to the."
2. Click on specified folder below.
3. Locate and select the folder created for this purpose.
4. Click "Next."

Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- ☒ move it to the
- ☐ move a copy to the
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ redirect it to people or public group
- ☐ have server reply using a specific message
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ mark it as read
- ☐ stop processing more rules

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with MVR License in the subject or body
move it to the specified folder

Cancel < Back **Next >** Finish



Cleaning Out Your Outlook Mailbox

H. Manage exceptions in the next dialog box (not shown).

1. If there are no exceptions, click "Next."

I. Finish rule setup.

1. Name your rule in Step 1.
2. Check "Run this rule now on messages already in Unread Mail."
3. Check "Turn on this rule."
4. Click "Finish."

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Items to Delete

Step 2: Setup rule options

☒ Run this rule now on messages already in "Unread Mail"

☒ Turn on this rule

☐ Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives with MVR License in the subject or body move it to the Items to Delete folder

Cancel < Back Next > Finish

The new rule will run and place all emails fitting the rule into the folder you've selected. Review the folder and either move or delete the emails it contains.

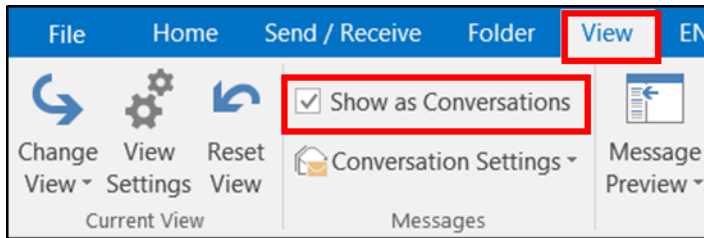


Cleaning Out Your Outlook Mailbox

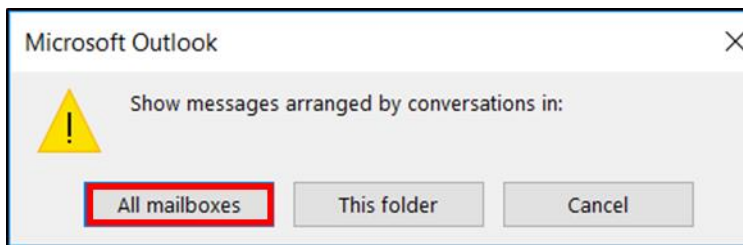
3 Group conversations

Multiple emails on the same topic can be grouped and moved at the same time. No need to figure out which in the string is the most complete. Follow these simple steps. This can easily be undone by unchecking the "Show as Conversations" box. Emails will revert to the default view.

- A. On the "View" tab, click "Show as Conversations."



- B. You will see this box pop up; select "All Mailboxes." This shows all emails as conversations and groups them.



4 The power of sorting

Don't underestimate the power of simply sorting emails. Most of us have Outlook email sorted by "newest," meaning the newest emails sit on top. There is a large list of options for sorting that can help you easily find and delete or move emails. Here are some sorting options:

- A. Sort by Date
1. Sort oldest to newest and delete anything that is out of date or obsolete information.



2. If there is anything older than 7 years, it can be deleted, in accordance with Alliant's document destruction policies.



Cleaning Out Your Outlook Mailbox

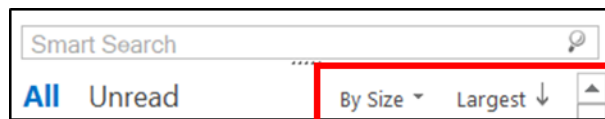
B. Sort by From/To

1. Locate and delete all personal emails from family, friends, vendors, and co-workers.
2. Locate all client and client-related emails and move them to the proper location in EPIC, a shared drive, or elsewhere according to company and department policies.



C. Sort by Size

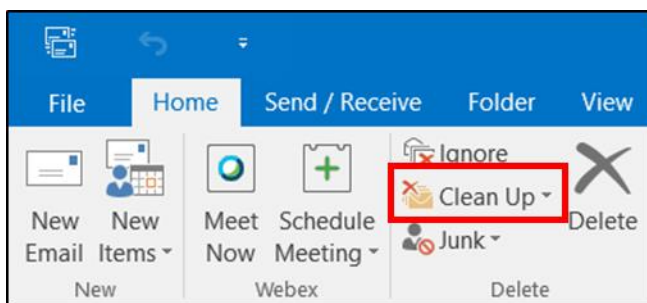
1. Sorting by size automatically pulls up the largest emails (usually those with attachments).
2. Attachments can be moved using the "Shift, Drag, Delete" method.



5 The Conversation Clean-Up Tool

Conversation Clean Up evaluates the contents of each message in the conversation and deletes duplicate messages; it is most useful on conversations with many responses back and forth, especially with many recipients. Here is how to use the Conversation Clean-Up Tool to remove redundant messages:

A. On the "Home" tab (next to the Delete X), click "Clean Up."



B. The dropdown menu contains these options. Click one of the following:

1. Clean Up Conversation: The current conversation is reviewed and redundant messages are deleted.
2. Clean Up Folder: All conversations in the selected folder are reviewed and redundant messages are deleted.
3. Clean Up Folder and Subfolders: All conversations in the selected folder and any folders that it contains are reviewed and redundant messages are deleted.

Privacy and security is the responsibility of all Alliant employees. Take some time each week to clean up your mailbox and reduce threats to Alliant, our vendors, and, more importantly, our clients.