

Lee, Chris

From: Houston, Bradley
Sent: Monday, January 31, 2022 2:23 PM
To: Totoraitis, Mike
Subject: RE: Request for Feedback: M365 and DocuSign Data Retention Policies

Thank you for this, Mike! I took a quick look at your comments and I agree, the highlighted area is much easier said than done. Like the Data Governance Policy, I wrote this at a very high level with the intent of dealing with the granular bits as I worked with specific departments. I think it's definitely something we need to discuss at the Data Governance Committee level after we get the SharePoint and Database surveys completed.

Re the retention labels—I'm not sure if they're available yet either but I do know that it is possible to assign records retention policy on an as-needed basis to specific libraries or folders. Having no confidence that people will do this themselves, though, I am hoping that ITMD will see fit to work with me to provide the off the shelf labels for retention use. I know for sure that I want to do retention through labels rather than through content types—I tried the latter when UWM was doing its own SharePoint rollout and it was an unmitigated disaster from a records retention standpoint.

Thanks again for the feedback—if you have anything further and want to meet to discuss please put something on my calendar.

Brad

Brad Houston, City Records Officer
Milwaukee Municipal Research Center
Zeidler Municipal Building Rm. B-1, Milwaukee, WI 53202
Phone: 414-286-5478

From: Totoraitis, Mike
Sent: Monday, January 31, 2022 11:58 AM
To: Houston, Bradley <Bradley.Houston@milwaukee.gov>
Subject: FW: Request for Feedback: M365 and DocuSign Data Retention Policies

Not sure if the Commissioner sent this over yet. Let me know if you want to talk more about the comments I made.

Mike Totoraitis, PhD
Director of Data and Evaluation | Division of Data and Evaluation
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From: Totoraitis, Mike
Sent: Friday, January 28, 2022 4:37 PM
To: Johnson, Kirsten <Krjohns@milwaukee.gov>; Allana, Sonia <sallan@milwaukee.gov>; Murph, Bailey <bamurph@milwaukee.gov>
Subject: RE: Request for Feedback: M365 and DocuSign Data Retention Policies

Commissioner,

I've reviewed the documentation and did not have any comment on the DocuSign policy. I did have a couple comments noted in the Microsoft 365 policy. I'd be happy to discuss further with Brad if needed.

Respectfully,
Mike

Mike Totoraitis, PhD

Director of Data and Evaluation | Division of Data and Evaluation

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From: Johnson, Kirsten

Sent: Monday, January 10, 2022 4:44 PM

To: Allana, Sonia <sallan@milwaukee.gov>; Totoraitis, Mike <MTOTORA@milwaukee.gov>; Murph, Bailey <bamurph@milwaukee.gov>

Subject: FW: Request for Feedback: M365 and DocuSign Data Retention Policies

From: Houston, Bradley <Bradley.Houston@milwaukee.gov>

Sent: Thursday, January 6, 2022 10:49 AM

To: Allen, Jerry (contact) <jerry.allen@cmers.com>; Benson, Joshua <jbenso@milwaukee.gov>; Cleary, Beth <bcleary@milwaukee.gov>; Coggs, Spencer <scoggs@milwaukee.gov>; Cooney, Jim <Jim.Cooney@milwaukee.gov>; Crump, Lafayette <Lafayette.Crump@milwaukee.gov>; Dettmer, Karen <Karen.Dettmer@milwaukee.gov>; Edwards, Myra <medwards@milwaukee.gov>; Fessahaye, Makda <mfessa@milwaukee.gov>; FINGER, CHERYL <cfinger@milwaukee.gov>; Fleck, Nicole <nfleck@milwaukee.gov>; Henke, David A. <dhenke@milwaukee.gov>; Himle, Sheldyn <shimle@milwaukee.gov>; Jackson, Celia <cmjacks@milwaukee.gov>; Johnson, Joan <JRJohns@milwaukee.gov>; Johnson, Kirsten <Krjohns@milwaukee.gov>; Joos, Renee <rjoos@milwaukee.gov>; Kelsey, Rhonda <Rhonda.Kelsey@milwaukee.gov>; Klajbor, Jim <jklajb@milwaukee.gov>; Kruschke, Jerrel <jkrusc@milwaukee.gov>; LIPSKI, AARON <ALIPSK@milwaukee.gov>; Mahan, Steven <Steven.Mahan@milwaukee.gov>; Mazmanian, Michael <mmazma@milwaukee.gov>; Meyer-Stearns, Jennifer <jrmeyer@milwaukee.gov>; Miner, Steve <sminer@milwaukee.gov>; Mishefske, Thomas <tmishe@milwaukee.gov>; Montgomery, Kimberly <Kimberly.Montgomery@milwaukee.gov>; Owczarski, Jim <jowcza@milwaukee.gov>; Purvis, Nikki <npurvi@milwaukee.gov>; Roberts, Erica <errober@milwaukee.gov>; Robinson, Sharon <srobins@milwaukee.gov>; Rodriguez, Danielle <DRodri@milwaukee.gov>; Sawa, Aycha <asawa@milwaukee.gov>; Shambarger, Erick <Eshamb@milwaukee.gov>; Spencer, Tearman <tspencer@milwaukee.gov>; Thomas, Dan <dthoma@milwaukee.gov>; Tindall-Schlicht, Adam <adam.tindall.schlicht@milwaukee.gov>; Todd, Leon <letodd@milwaukee.gov>; Woodall-Vogg, Claire <cwooda@milwaukee.gov>; Yaccarino, Dennis <Dyacca@milwaukee.gov>; Zelazny, Dana <D.Zelazny@milwaukee.gov>; Zuniga, Jonatan <jzunig@milwaukee.gov>

Subject: Request for Feedback: M365 and DocuSign Data Retention Policies

Hello all,

Happy new year! Attached, please find two policies approved in principle by the City Information Management Committee at its December 9, 2021 meeting for your review, as well as a memo explaining the nature of the policies and feedback requested. Please review with your staff as appropriate and submit any questions or comments you have to me by **February 7** if at all possible.

Additionally, friendly reminder that, if you have not yet submitted to me your departmental records coordinator changes, please do so by 1/14/22.

Thank you in advance,

Brad Houston, City Records Officer
Milwaukee Municipal Research Center

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