From:	Richter, Timothy
Sent:	Thursday, March 3, 2022 3:30 PM
To:	Houston, Bradley
Subject:	RE: DocuSign Question

Thank you Brad. As always, I appreciate your thorough explanations. We will certainly want to leverage DocuSign. We just need to get through some projects with our court software upgrade before looking at DocuSign.

In terms of the Records Maintenance and Retention Best Practices and the Office 365 Data Retention Policy, we have no issues or concerns with the proposed draft.

Thanks,

Timothy Richter
Court IT Manager
414.286.3836
tricht@milwaukee.gov

City of Milwaukee Municipal Court
www.city.milwaukee.gov/municourt

From: Houston, Bradley
Sent: Thursday, March 03, 2022 2:34 PM
To: Richter, Timothy <tricht@milwaukee.gov>
Subject: RE: DocuSign Question

Hi Tim,

DocuSign is actually administered by ITMD at this point, and their license is set up to cover the entire city. The provisioning process is manual at this point—you have to send an email to Don Turner in ITMD—at which point you will have access to e-sign and set up templates for document types you use a lot. For example, we have a docusign template for secure structure applications, because it's frankly a lot easier to track them in electronic vs. paper form. Other departments use it for anything that needs a signature attached to it—purchasing uses it for contracts, DCD Real Estate uses it for its property transactions, DPW uses it for a lot of personnel-type stuff, etc. The purpose of the policy is to get departments thinking about the documents they send through DocuSign as potential records, and about where those records should be retained once the signing transaction is complete (to wit: not DocuSign's own servers).

I've been playing with the template builder enough that if you think there is a particular form that could benefit from having data collected via DocuSign, I can probably help you compile it—there's a lot of neat stuff it can do besides e-signatures. If you have certain types of form fields it can even do data analysis, though that's not a function that I've explored extensively. If you'd like to meet to discuss putting something together, please let me know.

Brad

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

From: Richter, Timothy
Sent: Thursday, March 3, 2022 11:25 AM
To: Houston, Bradley <Bradley.Houston@milwaukee.gov>
Subject: DocuSign Question

Hi Brad,

I have been reviewing the Records Maintenance and Retention Best Practices for DocuSign. Thus far, the Court has not used DocuSign but we will be exploring its use with the Court in the near future. Can you tell me how departments are using DocuSign? In particular, is there a system in place for City departments to access, or does each Department implement their own DocuSign solution?

Thanks,

Timothy Richter
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