

## Document Collection, Management & Retention **Services**

Surety providers frequently retain VERTEX's IT experts to copy and digitally retain all files from bond principals when surety obligations are triggered because of payment and/or performance issues. VERTEX typically collects accounting information, contract documents, emails, letters, etc. and preserves the information on our cloud server, which can retain any amount of information for as long as necessary. This service allows sureties to rest easy knowing that relevant project information will not go missing overnight.

### Document Collection Services

- VERTEX personnel on site at principal's office to gather project-related documents, from both hard copy and electronic sources.
- Combination of VERTEX's IT and engineering professionals working together to collect the appropriate documents requested by client.

#### Collect documents from:

- **Principal's electronic file server:** contracts, change orders, drawings, specifications, RFI's, submittals, schedules, etc.
- **Principal's project controls systems:** ProLog, Expedition, Primavera P6, Primavera Contract Manager, etc.
- **Principal's accounting software:** Obtain native data files from Quickbooks, Timberline, etc. Retain ability to run all necessary reports in the future.
- **Employees' computers/laptops:** Any files that employees retained on their office computers that were not shared on the file server, including, email archives, application data, etc.
- **Email server:** Collect all current and archived email from individuals, groups, public folders, etc. which is essential to retain especially if litigation is expected.
- **Hard copies:** Scan all hard copies that are retained by principal of project-related files. Include in progress as-built drawings - very often would be impossible to replace and are often misplaced during a time of distress and turnover.

### Advanced Collection Services

- **Backup data:** Collect data from various backup system architectures with the ability to retrieve historical data from file servers that may have been deleted/damaged/or changed.
- **Database server:** Export databases from proprietary Microsoft SQL, Oracle or Access systems and recreate, as needed, for on-demand access or provide custom queries.
- **Virtual Server Accessibility:** Clone application servers if there are proprietary systems and make available in a cloud-based environment for end users.

### Document Management & Retention Services

- All documents retained by VERTEX would be hosted on cloud-based file server with web access for each system.
- Login credentials would be set up for surety, counsel, accountants, etc. - any stakeholders deemed necessary by the client.
- Documents would be searchable for keywords by counsel and consultants - essential service for litigation support.
- Email archive for all email addresses would be fully searchable by sender, receiver, date, subject, keyword search, etc. with full access to email attachments.
- Availability to produce files for e-discovery in litigation.

### Benefits

- VERTEX IT and engineers work in concert with each other to greatly improve the end user's experience.
- One contact for training, reorganization and assistance from both an IT and engineering perspective.
- Comply with surety's "paperless" office policies.
- Reduced cost of unnecessary copying of hard-copy documents.
- Reduced storage costs - no physical storage required.

For example: When a surety's principal goes out of business, the surety often becomes the custodian of their project-related files. The cost of storage for 7 - 10 required years can exceed \$100,000.

- Reduced time on front end in document collection as opposed to physically copying files. When a surety's principal is in distress, time is of the essence to retain files while they are still available to the surety.
- Preservation and security of documents is made available by cloud-based storage. Redundancies keep files from being damaged or destroyed.
- Typically 48- to 72-hour turnaround (varies, based on volume of file).
- Assigned technical representative and live tutorial following the document collection and retention to assist the surety navigate VERTEX's systems.



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