

# Case Study 2: Clugston Construction

The aim of this pilot was to process and validate Purchase Orders using electronic signatures. The documents required a single signature on each page whether it was a single page or a multi page Purchase Order.

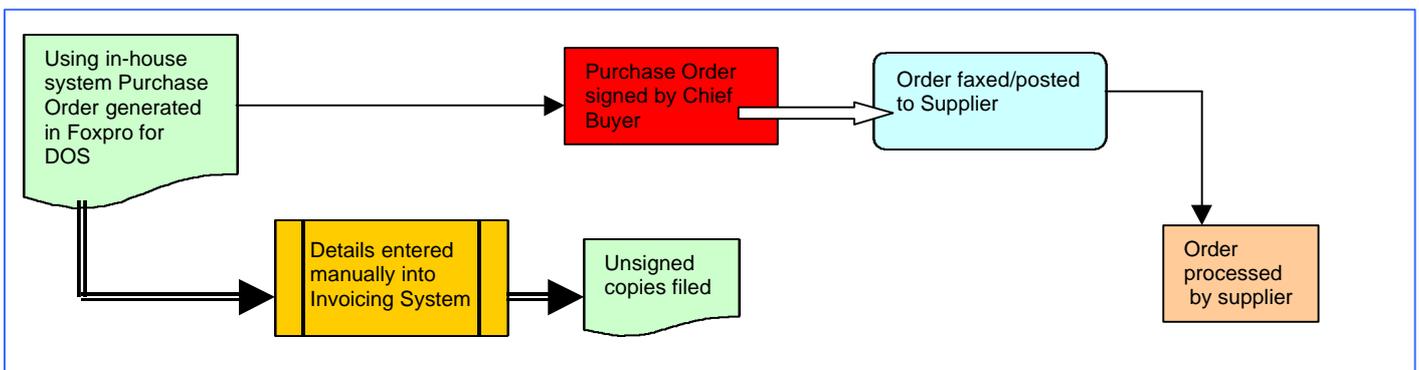
## Background and Pilot Partners

**Audata Limited:** a CITE Service Provider member and developer of electronic signature capture software 'Sign-it™'  
**Clugston Construction:** a CITE contractor member. Those involved in the pilot were the IT Manager and Chief Buyer both from the Scunthorpe site office.

**Keyline/Travis Perkins:** Builders Merchants, supplier to Clugston and a CITE member. The person involved in the pilot was the National Accounts Manager.

Audata set up a pilot study using biometric signature software with Clugston who chose to use the software in their Materials Buying Department, in conjunction with their supplier, Keyline/Travis Perkins based in Leeds. The software had to be installed at both the sites in order that the signed documents could be authenticated at either end. The duration of the trial was 10 weeks.

## Original Procedure



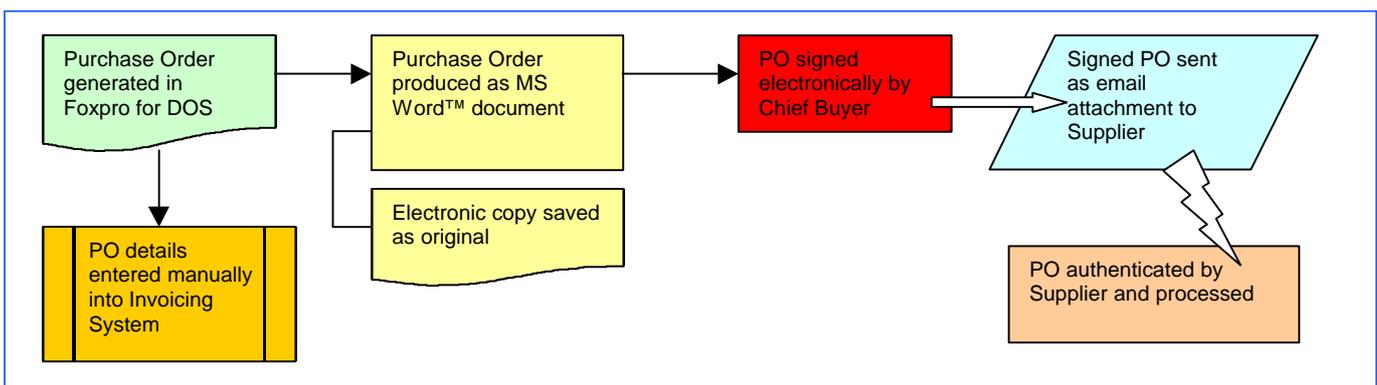
## The Approach

Clugston's preferred option for the pilot was to electronically sign the purchase order generated in their in-house system and then email it to Keyline/Travis Perkins, who in turn checked that the document had not been altered since it was signed before processing the order.

The signature software versions made available by Audata for the pilot supported MS Word™ and Adobe Acrobat formats, which meant that Clugston would need to adapt their existing procedure in order to participate in the pilot. After discussion, Audata suggested that the purchase order should either be created in Microsoft Word™ or converted to PDF format. This could then be electronically signed and sent as an email attachment to their supplier site at Leeds. Although Clugston wanted to opt for the Acrobat version, the IT department of Keyline preferred the Microsoft Word™ as they were more certain that this was available throughout the organisation.

Prior to the installation, Audata obtained sample documents from Clugston to run tests as well as to ensure that the signature box could be correctly positioned on each page of a multi-page purchase order. The installation of the software was carried out in one day and users from both Clugston and Keyline/Travis were also trained on that same day. The users were provided with a printed guide for use during the pilot.

## Clugston Procedure using Electronic Signature Software



## The Issues and Suggestions Made

Issues - Clugston	Suggestions - AUDATA
There was double entry of purchase order information by Materials Buying department because the order was required to be in the in-house system for completeness.	Clugston need to consider setting up the ordering process for electronic transmission.
Very occasionally MS Word appeared to crash when using the signature tablet.	Audata are monitoring this to find the cause
The need to enter the base information in the signature window before every signing session could be time consuming and exasperating.	The software already has the facility for some of the base information to appear as drop down lists. Additional features to the signature software have been developed and one of these features automatically enters the user's details, thus avoiding the need for repetitive entry.
Due to the absence of the server installation of the signature software (Sign-it Server), it was not possible to authenticate whether the signature was actually that of the signatory. However it was possible to check whether any changes had been made since signing the document.	For the purposes of this pilot all partners agreed that the server software (which manages and authenticates the signature templates) would not be installed.  The situation was still an improvement – it provided the same evaluation by eye as paper, with the addition of 'evidence' that the document had not changed.

## The Perceived Benefits

### From the Clugston Point of View

- Using the software improved the efficiency of their current procedure by potentially streamlining the order process
- It speeded up the process of sending a legal document to a supplier as well as providing an electronic record of that legal document

### From the Keyline/Travis Point of View

- The recipient of the order was able to ensure that the document had not been changed since being signed
- The overall procedure was much quicker
- The printed copies of electronically signed purchase orders were of a better quality than faxed copies, i.e. the signature was much clearer.

## Future Possibilities for Clugston

- If Clugston choose to roll out the signature software fully they will require a more seamless solution, ideally with the signatures being applied within the Purchase Order software. While the Adobe Acrobat format would take them closer to this, it is still an additional step and a full integration within an application would be the ideal solution.
- To have the signature software available in other formats, for example, Microsoft Excel™ (without the need to convert to pdf format) may also be a consideration. This would be the most appropriate solution where a spreadsheet was being worked on in more than one location by different organisations.
- Clugston became aware that there were many potential internal and external applications where the software could be used, however business cases would have to be made in each situation, plus additional changes to their existing system.

## Comments from AUDATA

Biometric signature software that supports Microsoft Excel™ file format is now available

## Comments from Clugston

Clugston agreed that generating electronic signatures using the signature software was generally an improvement for their business processes and has potential when they are in a position to email orders and receive electronic invoices.

