



## BUSINESS SOFTWARE GROUP

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### TriSys AI Integration

Claude Connector Configuration Guide



**Access your TriSys data directly from Claude AI Chat**

Search contacts, users, and business records using natural language

Version 2026.05.13

## Introduction

Business Software Group has built an MCP [Model Context Protocol] Server specifically for TriSys customers. This can be used by Artificial Intelligence Chat clients such as Anthropic Claude to allow TriSys customers to write queries in natural language which will be effectively answered by your TriSys database using AI.

The MCP architecture utilises the intelligence of the LLM [Large Language Model] to not only understand natural language but also utilise many concepts it has learned during extensive training, and can thus work out how best to answer a question often using multiple paths to get the best result.

This document describes how you configure Claude to integrate with TriSys.

## Obtaining your Access Key

The MCP Server is highly secure allowing access only using a dedicated public key, hiding your private credentials behind our firewalls. This is because you will be using a third party web site [Claude] therefore we do not want you to supply your private e-mail address and password, hence we supply you with an access key in the form of a URL which you will use to add a connector in Claude to your TriSys database.

To obtain your MCP Server access key, please e-mail [support@trisys.co.uk](mailto:support@trisys.co.uk) where our support team can provision access and carry out any additional security checks requested by your employer.

## What You Get

### Natural Language Queries

Ask questions in plain English - no complex commands or SQL needed

### Real-Time Data Access

Connect directly to your live TriSys database

### Powerful Search

Search contacts, companies, requirements, placements, users, tasks and more

### Secure Authentication

Uses your own personal URL with server-side secret login credentials

### No Programming Required

Simple configuration, works immediately

#### Example Queries:

- "Who am I?"
- "Search for contacts named Joanne"
- "Where are most of our placements?"
- "List the names of the people who give us the most business"
- "List contacts in London"
- "What's the latest user activity?"

## Requirements

### Before You Begin:

✓ Visit [claude.ai](https://claude.ai) and login with your Anthropic account in your web browser

✓ You will need your personalised TriSys MCP Server URL:

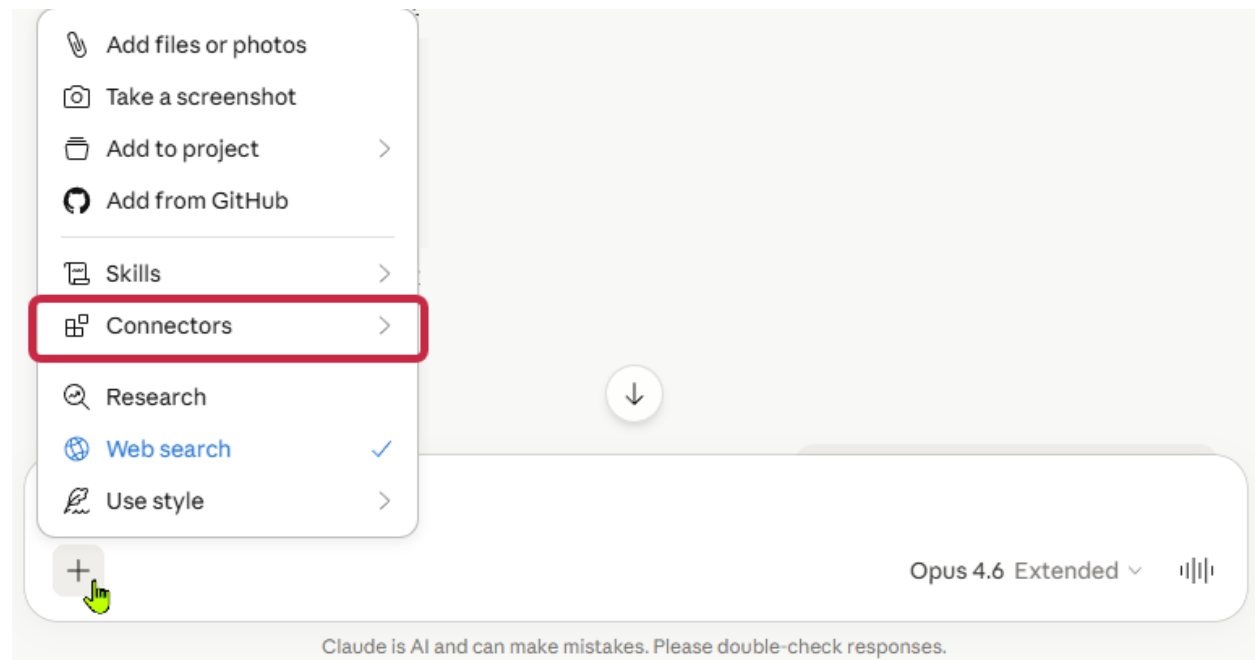
e.g. <https://mcp.trisys.co.uk/mcp?guid=xyz..>

This will have been supplied to you by e-mail upon request. See above.

## Setup Instructions

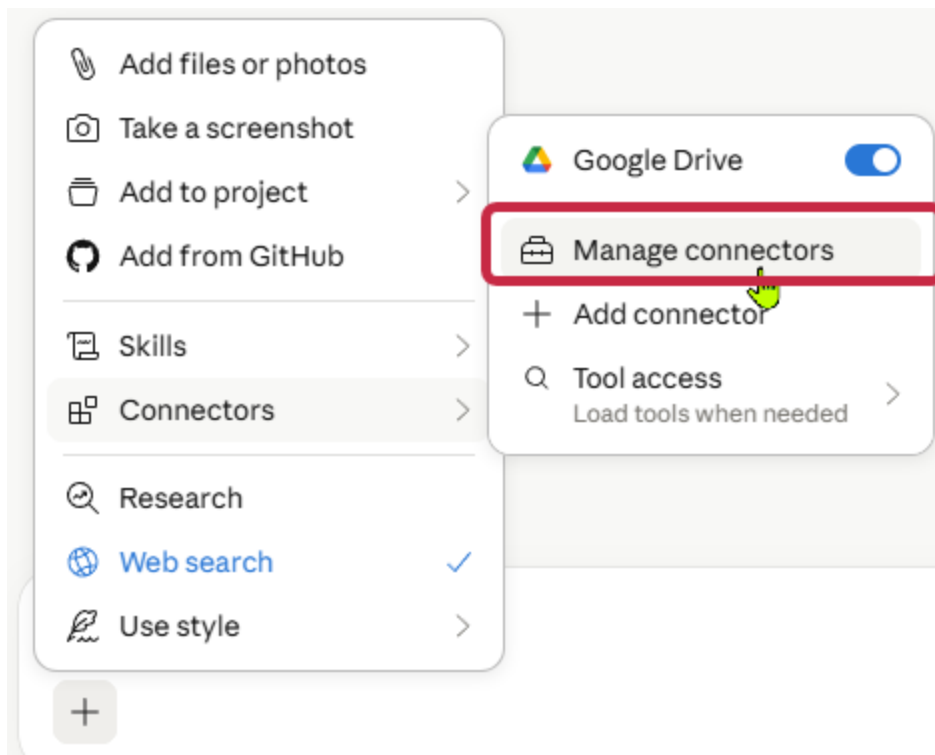
### Step 1: Open Claude Chat Menu

When in a chat, click the + button to show the popup menu and click Connectors:



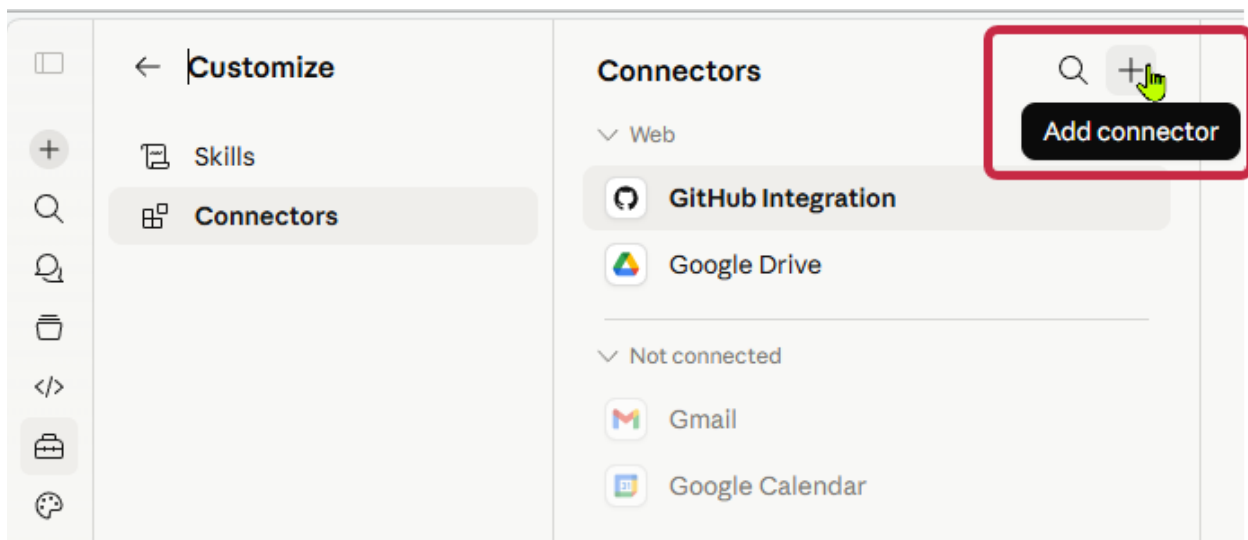
## Step 2: Manage connectors

Select the Manage connectors option:



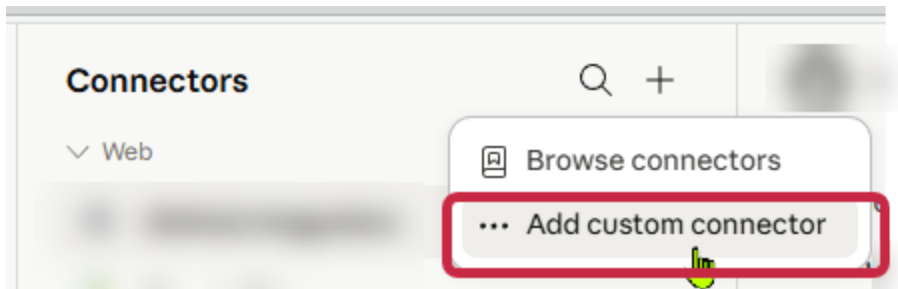
## Step 3: Add connector

Use the + button to the right of Connectors:



#### Step 4: Add custom connector

Choose the Add custom connector drop-down menu option:




#### Step 5: Add custom connector

The Add custom connector dialogue will popup:

### Add custom connector BETA ×

Connect Claude to your data and tools. [Learn more about connectors](#) or get started with [pre-built ones](#).

▼ **Advanced settings**

Only use connectors from developers you trust. Anthropic does not control which tools developers make available and cannot verify that they will work as intended or that they won't change.

Building an MCP server? [Report issues and subscribe to updates here](#)

Type or paste your personal URL into the following fields:

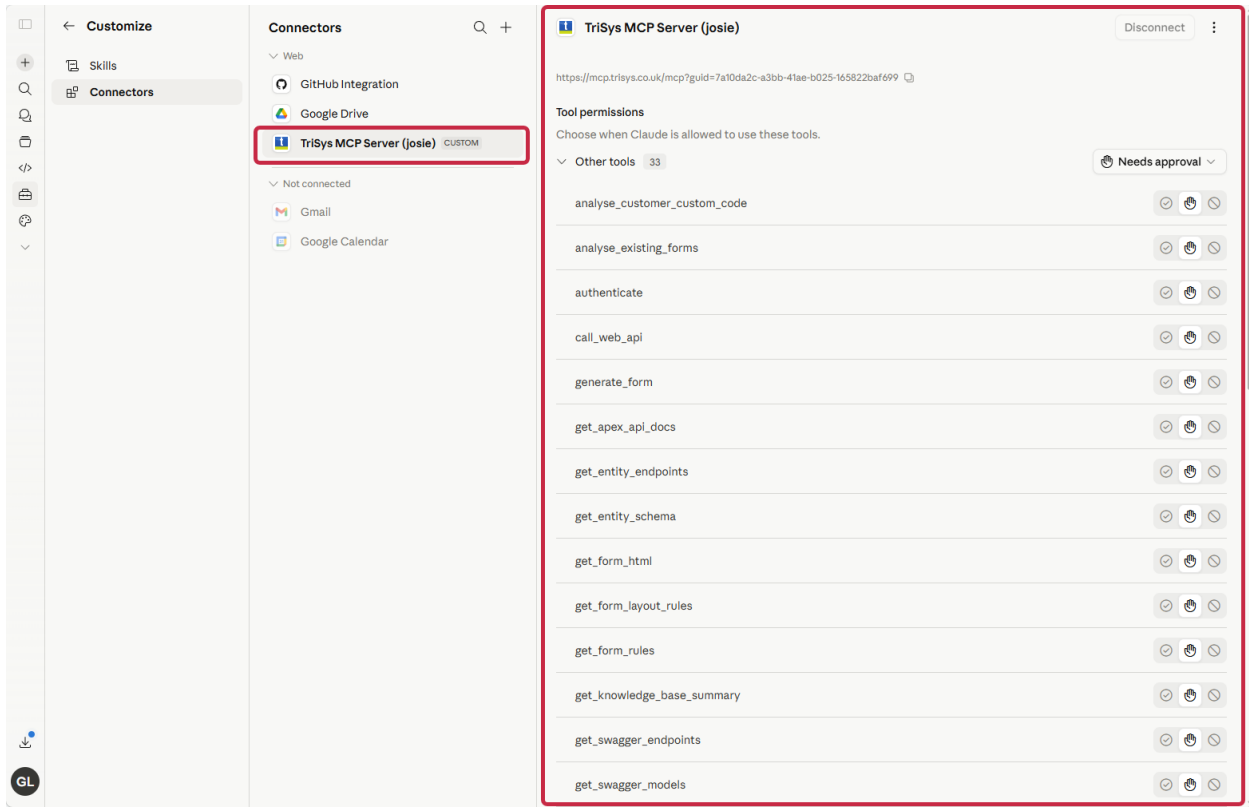
**Name:** TriSys MCP Server

**Remote MCP server URL:** <https://mcp.trisys.co.uk/mcp?guid=xyz..>

Click the **Add** button.

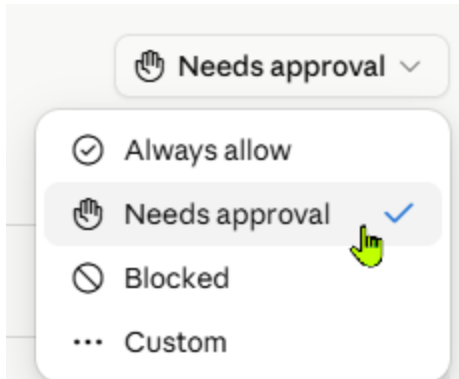
## Step 6: Verify Connector

Claude will take a few seconds to connect to your MCP Server, then display a list of available tools:



## Step 7: Always Allow

Claude assumes that prompting you to confirm every request is your preference. To prevent this constant prompting, click the "Needs approval" button to drop down this menu:



Choose the "Always allow" option. You should then see the tick option selected for all tools.

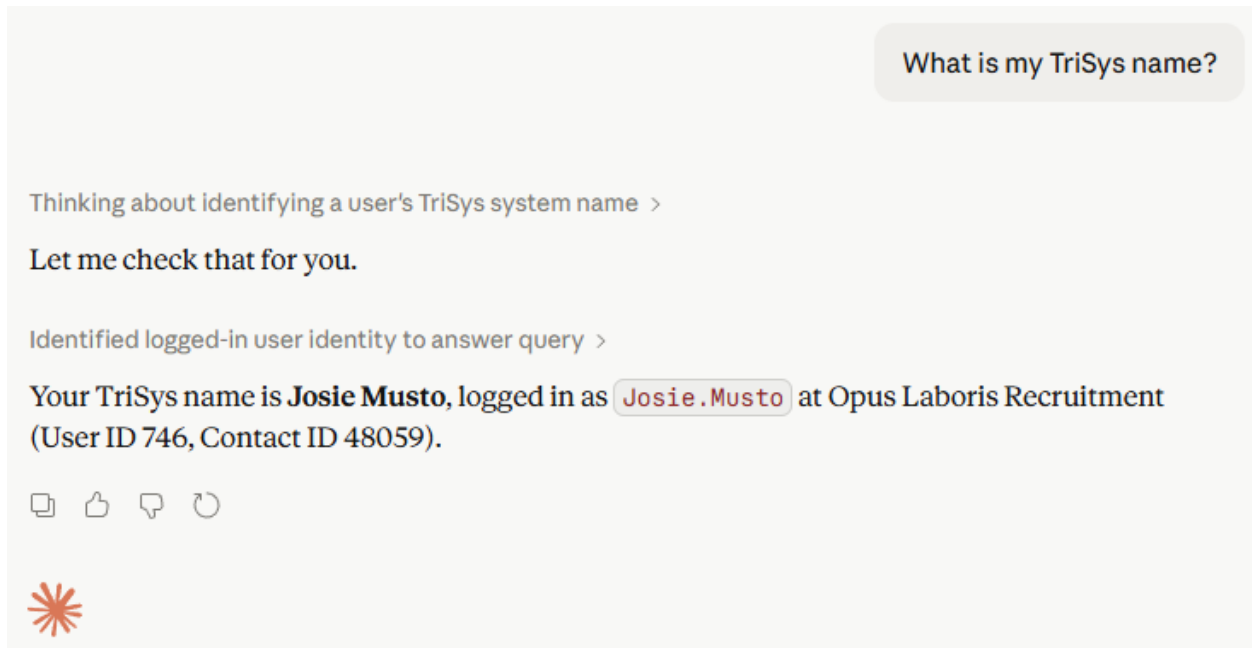
You are now ready to start querying your TriSys database using artificial intelligence.

## Testing using Natural Language

Open a new chat in Claude.

Identify who you are by asking this question: "What is my TriSys name?"

Claude will connect to the TriSys servers and work out how to interpret your natural language question. It will respond with your details like in this example:



What is my TriSys name?


Thinking about identifying a user's TriSys system name >

Let me check that for you.

Identified logged-in user identity to answer query >

Your TriSys name is **Josie Musto**, logged in as **Josie.Musto** at Opus Laboris Recruitment (User ID 746, Contact ID 48059).

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This confirms that Claude obtained this information from your TriSys database.

Another example shows how Claude + MCP can 'think' to deliver the most appropriate answer to your question "List my most active 5 colleagues?":

List my most active 5 colleagues?

Refined search strategy to locate active colleagues >

Those results aren't quite right — let me search specifically for your colleagues at Opus Laboris.

Pivoted search strategy to locate active user contacts >

The AI search isn't filtering well for this. Let me try the Web API directly to find system users.

Identified API endpoints to retrieve active user metrics >

Let me try the dashboard metrics to find activity by user, and also get the list of users.

Examined task activity and cross-referenced additional metrics comprehensively >

Here are your 5 most active colleagues by task activity:

1. **Isaac Newton** — 41.4% of all tasks
2. **Josie Musto (you!)** — 21.5%
3. **SuperUser** — 11.8%
4. **Thomas Addison** — 8.7%
5. **Francisco Janes** — 6.2%

Isaac Newton is the clear frontrunner with roughly double your task share. Would you like me to dig deeper — for example pulling the requirements or placements breakdown by user to see if the picture changes across different activity types?



Another example shows how TriSys' search can be invoked by asking the question "Show me the best candidates available now who have worked in tech in Cambridge?":

Diagnosed search filtering malfunction, explored alternative query strategies >

The AI criteria search isn't filtering effectively here — it's returning the full database alphabetically. Let me try a more targeted approach.

Acknowledged database limitations and pivoted search strategy >

Garry, I've run several searches across your TriSys database and the honest answer is: the results are thin for that specific combination. Here's what I found:

**Cambridge-linked contacts** (11 total) — mostly matched on company name containing "Cambridge" rather than candidates actually based there and working in tech. The closest matches are:

- **Toby Lootmeister** — Senior Technical Consultant at Cambridge City Council (Client, not Candidate)
- **Andy Sedgwick** — T24 Consultant at Cambridge Professional Group (Candidate, but based in Atlanta)
- **Chris Fernandes** — VP at Cambridge Professional Group (Candidate, also Atlanta)

**Tech-related searches** ("software", "engineer", "tech") returned very few records, none based in Cambridge.

The AI criteria mode on the search API doesn't appear to be filtering effectively — it keeps returning the full 3,186 records sorted alphabetically regardless of the natural language query. And the wildcard search only matches against name, company, email, and job title — not location or industry fields directly.

A couple of things worth considering: the wildcard search errors on longer terms (like "developer", "consultant", "technical"), which might be a bug worth looking into on the API side. And if you wanted richer candidate searching by location + sector, that might need a dedicated API endpoint that queries against address and industry fields together.



## Support & Contact

AI technology is the fastest growing and changing industry in the world right now, so things will break or produce answers which may be unsuitable. A phenomenon known as 'hallucination' is prevalent where AI 'makes stuff up'.

Whilst TriSys Web API is almost 20 years old, and industrial strength, our MCP Server utilises software and services which are only months old in the artificial intelligence industry, so there will be quirks whilst it matures.

Should you encounter any issues, or ideas to benefit this service, please e-mail [support@trisys.co.uk](mailto:support@trisys.co.uk) in the first instance so that we can work to improve this service for everyone. Our dedicated AI team utilises leading-edge technology for rapid turnaround from bug report to deployment, often in hours.



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