

## ***Topics Covered***

Overview

Traditional Information Display

Active Intelligence Explained

Staying “In Context”

A Practical Example

White Paper

*Software Series*

*Active Intelligence™*

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**Overview**

*Information changes based on what the person is doing.*

*Information can come from virtually any source.*

Active Intelligence™ is a term coined by TIS Software in the UK to describe an innovative method of working with business software. The process involves changing the information delivered by looking at the “context” that the person is working in. Information can be bought in from any source in the business or even available data from other organisations.

What data is bought in depends on the Role that the person does, the information that they are working with and the company’s view of what they need.

**Traditional Screens**

*Screens are designed by the programmers.*

*Flexibility is given by “screen painting” the data that has been made available to the screen.*

*Companies commonly have multiple data sources.*

*Staff have to move between programmes to complete their tasks.*

Traditionally, a user will “log in” to their computer system and start working. A sales person will look at quote and order screens, or possibly be working with a CRM system for call management information.

Each of these screens will have information on them from the business software. The screen will also often have the flexibility to tailor the screens to bring information on screen, take it off screen or move it around. However it does not allow users or their IT departments to combine information from other sources.

It is quite common for a distribution company to be running one application for their accounting and distribution requirements. They may then have separate applications for CRM, Business Intelligence, Warehouse Management and Payroll. Typically users will have to move between these different systems to find information and do their day to day job. While the quality of the information is not disputed, the time spent moving around the different screens is a significant source of lost productivity.

**Active Intelligence**

*Information can come from multiple data sources.*

*Information is combined on one screen.*

*The business decides what is shown based on a person’s role and the screen they are in.*

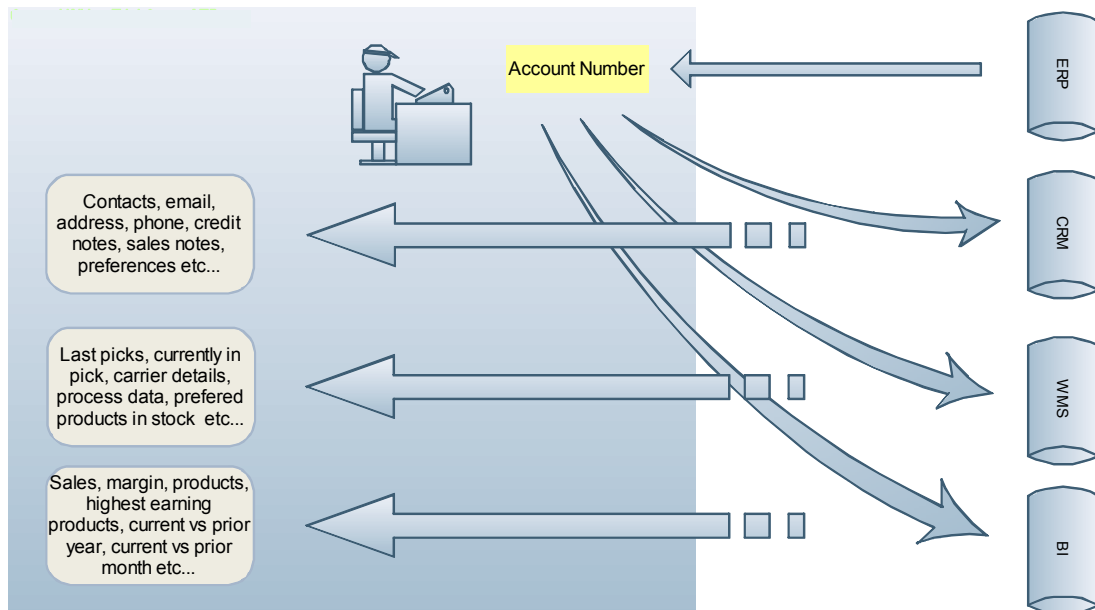
*The user is fully informed, with all information in one place at one time.*

*Customer service is faster and higher quality.*

Active Intelligence™ plans to unify the information from multiple sources into one place. The business can then organise and deliver the data that is required for a person to do their job effectively.

To do this effectively requires some business process involvement. When a credit controller enters a customer account number, what is the ideal information for them to receive? As the diagram below shows, there can be any number of options. When the credit controller inputs a customer account number, information is returned from three extra sources on top of their normal ERP. The key is to deliver the information that is pertinent to that person’s role so that they can make decisions without having to resort to other screens.

The graphic below gives some examples of what information might be taken from each source for a distribution / wholesale company. In reality, any information held in any data source can be taken and the opportunities are almost endless.



The potential improvement in customer service is obvious. In a contact with a customer, the staff member is able to gather information from multiple sources immediately and make informed decisions on the spot.

#### Context Relationships

*Active Intelligence looks at the data entered into a field. It finds all other information relating to that field.*

*Information can be data from a database, pictures, web links, email links etc.*

*Each company defines what they want for each of their critical screens.*

Active Intelligence™ is portrayed in its simplest form above. Data displayed can be altered as the information entered changes. In other words, the information changes “with the context” of what the person is doing.

As an example, a sales person is entering a customer account number. Perhaps the customer then questions the price on a specific product so the controller enters the product code. Active Intelligence™ can then change the information relating to this context by looking for customer & product information such as;

- Quantity, price and margin of recent sales of this product to this customer
- Quantity, price and margin of recent sales of this product to any customer
- A picture of the product
- A URL link to a pdf of the invoice
- Stock and cost of the product
- An email link.

The customer may ask for information about an existing order. The context could again change to give such information as:

- Extract the consignment and carrier details from the warehouse management system.
- Go to the carrier web site or system to obtain the latest delivery status on that order.
- Display links to pdf's of the quote, acknowledgement and invoice in the document archive.

The opportunities are virtually unlimited and the company's IT team is in control of what data is delivered for each application's context.

This allows a company to define what information is pertinent for each role in the company and deliver it to them.

### Practical Example

*Sales Enquiry screen from a distributor's ERP.*

*Information taken from CRM, Debt, Notepads and Sales.*

*Context screens can be open or closed.*

*Every screen can have different data for each role.*

There will always be a driving application for this technology. The example below is driven from a distributor's primary business software (ERP) system.

The operator has entered the order enquiry screen and entered a customer account number and selected an invoiced order. This is shown on the right hand of the pane. The context screen is in the left hand pane and displays other information that the company wanted visible. The information portrayed can be in boxes that are automatically open or closed and can be the first line or multiple lines. This company has chosen to display;

- Customer contact name, number and role. By clicking the envelope it will launch an email to the person and they can edit the customer contact information. They can also launch a screen to create a new contact.
- Three notepads. One general notepad, one for sales and one for credit control. These show the first line of recent contact information. The operator can quickly assess if there are any outstanding items to discuss with the customer.
- Credit information. The customer's current credit status and invoice ageing are displayed to give immediate information on their account position.
- Delivery address information. The customer's deliver address is displayed.

This is only an example of what one company has chosen for one screen (sales order enquiry) for one role. Other screens have different information attached to them.

Product	Product Description	Quantity	U..	Stat	Line
GBP8954	General Purpose Base	6	Ita	Inrr	10
BRP5483	Benign Product Code	2	Ita	Inrr	20
GPR3000	General Product Release Item	1	Ita	Inrr	30
DELIVERY	Packaging & Delivery Charge	1	Tic	Inrr	9000

**Summary**

*Active Intelligence™ is simple to use. The technology is invisible*

*Few packages support AI at present.*

*This is a benchmark technology for future.*

The power of Active Intelligence™ is in its simplicity for staff in a day to day environment. They receive the information that they need in one place. They enter one screen to do a job, so the information that need to complete that job can be displayed immediately. They can then complete the job efficiently and effectively.

There are a limited number of business packages using this technology at present, but it is seen as a benchmark for business system design in the future.