CU I&E Submission: Department Procurement Automation and Streamline Using Chatbots [1]

Category

Procurement
Technology

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Project Description

The PSC has a robust website and staffed help desk to help staff with purchasing questions. However, grant project staff often first reach out to research administrators to ask about various procurement processes. There are a lot of variables (especially when sponsored funds are used) that make it hard to line up how to proceed with various procurements. However, it's very time consuming (sometimes requiring multiple emails and meetings) to get project staff lined out on the process. This project uses several chatbots that are in various stages of completion that will ask research project staff a standard set of questions to point them to the right process. Once the correct scenario has been identified the chatbot can send them additional information or checklists, and in some cases point them to a formstack request for tasks that involve research administration implementation. It will also redirect to a human when necessary.

Project Efficiency

Once fully implemented this will give program staff a consistent entry point for getting help with their procurement questions in a way that fully considers the complexities often inherent with sponsored projects (allowability, compliance, etc.) that isn't fully realized on the PSC website or with the helpdesk. This takes questions that are asked on repeat on a regular basis and frees up the research administrators time and removes a barrier whereby the administrator is sometimes a bottleneck of information. Also, the chatbots were developed using the Microsoft Power Platform which is available to all university staff.

Project Inspiration

I have worked at the University for 10yrs answering the same process questions over and over. There are a lot of follow-ups involved (i.e., was this expense in the justification, is it +/- $10k, is the consultant being paid with a Social or tax ID, etc.). Using chatbot technology allows the person to answer these questions and the chatbot can act as a one-stop shop, connecting university processes/procedures with department processes/procedures. The inspiration really comes from the desire to want to be able to focus on high value tasks and defer to technology when possible.

What Makes You Happiest about this Project?

This saves an enormous amount of human capital by having the ability to deploy digital assistants for questions, information, training, and the transfer of departmental/institutional knowledge that can take 12-18 months to acquire. For example, our chatbot can help someone through a complicated Honoraria process and direct them to a formstack which addresses compliance, internal role clarification, etc. https://ucdenverdata.formstack.com/forms/honorarium_request_copy [3]. This allows people to do their job effectively, clarifies roles, and ensures compliance at the highest levels.