

Excerpts from a NACUBO Forum on AI in Business Offices

Texas State:

Good morning,

At Texas State University, we've been applying AI and automation primarily within our IT procurement and contract management workflows, and we've seen measurable improvements that may align with what you're exploring. We've introduced AI in contract review, redlining, and compliance verification. The technology analyzes workflows, flags redundant steps, and translates complex legal or policy language into clearer terms for vendors. We piloted several platforms (ChatGPT, Gemini, Copilot, and Perplexity) to compare performance. Ultimately, we built a custom AI chatbot trained on state, system, and university policies to generate reliable contract insights and accelerate reviews. Our outcomes were measured and found that the full procurement cycle time was reduced by 42% and our contract negotiation time was down by 31%. We found that using AI improved accuracy, transparency, and consistency in our documentation while finding challenges that we needed to do what we could to overcome. We determined that AI needs strong human oversight, we still conduct clause-by-clause reviews for quality control. With compliance being a priority training AI with institution-specific policies was critical for producing trustworthy outputs.

As a university, we are now exploring expansion into invoice and spend analytics for anomaly detection and forecasting, while continuing to balance automation with human judgment.

Hope this helps but if you have any other questions, please reach out.

-Lauren Clawson

Lauren Clawson
Director of IT Business Services
Texas State University

Oakton College

Adding something I have not seen mentioned yet, Google's NotebookLM. We have this as a part of our Google Suite, and it allows you to define the sources for the AI-assistant to use. For instance, we have one notebook called "Policy and Procedure Repository", and we

uploaded nearly 200 documents for the notebook to use. These include BOT policy, administrative procedures, college catalog, environmental scan, union contracts, SEM plan, strategic plan, Dean's guidelines, student handbook, brand guide, master plan, etc. From here, we can engage the Notebook to get answers based upon the collective sources we defined.

Matt Huber
Dean of Enrollment Management
Oakton College

Butler University

Wanted to second Matt's sharing of Google NotebookLM. I am in financial aid. I can create a notebook of the regs, dear colleague letters, Federal Handbook chapters, and actual law for a particular piece of administering Title IV federal aid and use conversational language to ask it to compile the information with sources so I can validate. At this time I use 4 separate Federal regulatory notebooks and then shared them with team members. It is an incredible tool to bring together disparate information and find answers more efficiently.

Melissa Smurdon
Executive Director, Financial Aid
Butler University

University of Michigan

Hi Tanner.

You hit a hot topic! I can say that here in Procurement Services at the University of Michigan we have used AI to deliver chat bots on our website for faculty and staff to utilize to get answers on procurement policies and procedures. We are in the process of rolling out another component for our buyers to use to get answers to common questions in spend analytics, such as "How much did the College of Engineering spend with [insert supplier name]?" Although I am involved in the efforts from a data perspective, we have another team that really handles the AI effort. We all report to the same boss, though, which helps with knowing what the other team is capable of doing.

As far as automation goes, we use a few tools such as [Alteryx](#), Automation Anywhere and Power Automate to automate manual processes. For Alteryx, we run one server instance to

schedule regular workflows that extract data from a variety of sources, prep and clean it, and finally load into our Procurement datawarehouse, generate reports directly to users or even execute commands to other systems using system APIs. One example we have found particularly useful is searching for duplicate voucher entry where the system checks aren't able to catch. Alteryx provides a fuzzy match tool in particular that helps to identify those potential duplicate vouchers. We can then send those investigations to our AP department to research and, if truly a duplicate voucher, stop the payment before it gets "out the door".

I hope this helps and thank you to everyone who has posted on this as well. It is great to hear what is happening out in Higher Ed finance.

Douglas Hovey
Business Process Technology Analyst
University of Michigan

University of Kansas

All -

Thanks to everyone who shared their experiences with AI and automation in higher ed! This thread has been such a great source of ideas and insights into what's happening across institutions. Really appreciate the collaboration!

As Lindsay pointed out, Tyler has graciously added '**AI SharePoint Agents, Sample Instructions**' to the Community Exchange library, which can be accessed via the top menu in Community Exchange. Not sure if a direct link will work, but giving it a shot: <https://community.nacubo.org/viewdocument/ai-sharepoint-agents-sample-instru>

Thanks!

Tanner

Tanner Grubbs
Functional Systems Analyst Sr.
University of Kansas

University of California – San Diego

I can share how we've approached AI in financial operations at UC San Diego, since it might give you some ideas for your own institution. Over the past few years, we've been steadily modernizing our administrative and financial systems to make them more connected, responsive, and accurate.

One of the biggest changes has come from developing our own AI solutions in-house. For example, we have TritonGPT, which is a generative AI assistant built and hosted here on campus at the San Diego Supercomputer Center. Because it's running on our own infrastructure, we can tailor it to our policies, data governance rules, and day-to-day workflows. It's already supporting staff with routine tasks like drafting emails, creating accurate job descriptions, and responding to common inquiries. We developed an assistant called Fund Manager Coach that helps fund managers navigate complex grant and departmental finance requirements. We are also working with our Procurement team to develop a contract review assistant to expedite contract processing times and we are leveraging AI and automation with our Accounting team for supporting compliance with GASB requirements. Our custom approach gives us control over accuracy, privacy, and ongoing refinement based on staff feedback. We have demos of a few of our assistants on our TritonGPT UCSD Blink website, if you are interested.

It hasn't been without its challenges. Protecting sensitive financial data has been critical, so we've kept confidential information away from external AI tools unless there are clear contractual safeguards. Right now, we also make available a wide-variety of AI tools for our campus (Google Gemini & NotebookLM, Copilot, Zoom AI, and we have enabled some AI features in our cloud-based platforms). We've also found that training is essential. Staff need to understand AI's limits and know that human oversight is still a must. The technology is at its best when it's working alongside experts who can interpret and guide it.

What's been most valuable is the way these tools have freed up time and capacity for more analytical and strategic work. The next step is to build AI into the majority of our business processes in order to fully scale the use of AI across the campus. Leveraging AI to develop more automation in our processes is a critical next step as well to reduce administrative burden. We are currently hiring an AI Engagement Director in my unit to assist with broad adoption and to measure the impacts of these projects. If you're considering a similar journey, I'd say that controlling your infrastructure, involving your staff early, and planning for ongoing refinement are key to making the technology truly work for your institution.

Allorah Pradenas

Assistant Vice Chancellor and Chief of Staff to VC-CFO
University of California, San Diego
