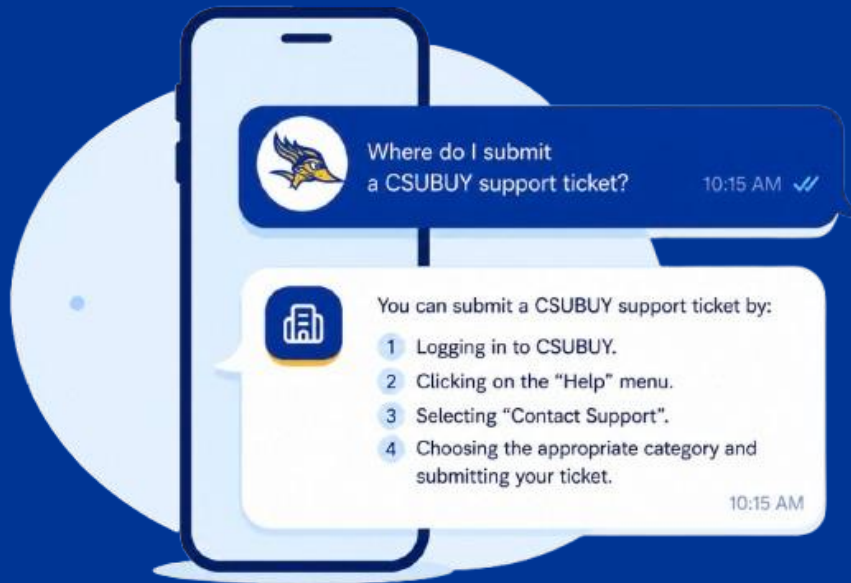
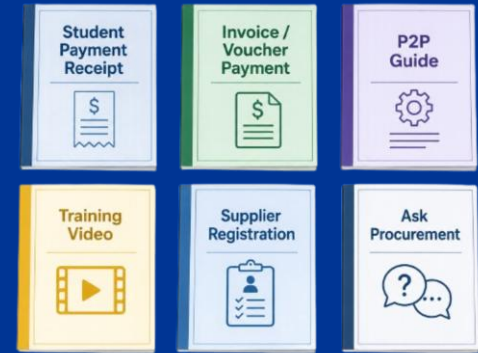


CSUB Procurement AI Assistant

A smarter way to ask procurement questions and get clear next steps.



The problem: *Too Many Answers!!!*



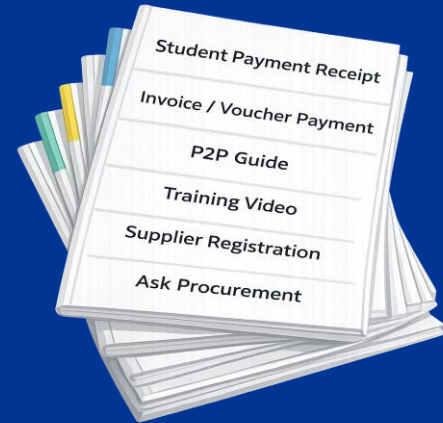
More sources don't always
mean a clearer next step



Size

2.6 GB

80 Files

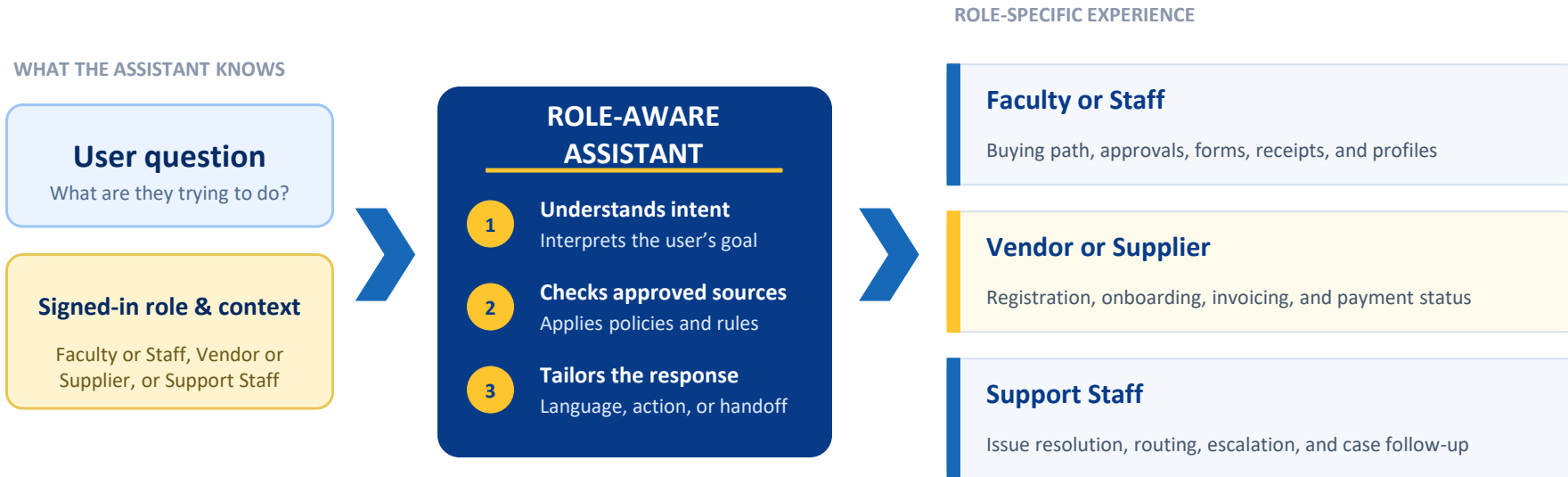


Meet the CSUB Procurement Assistant

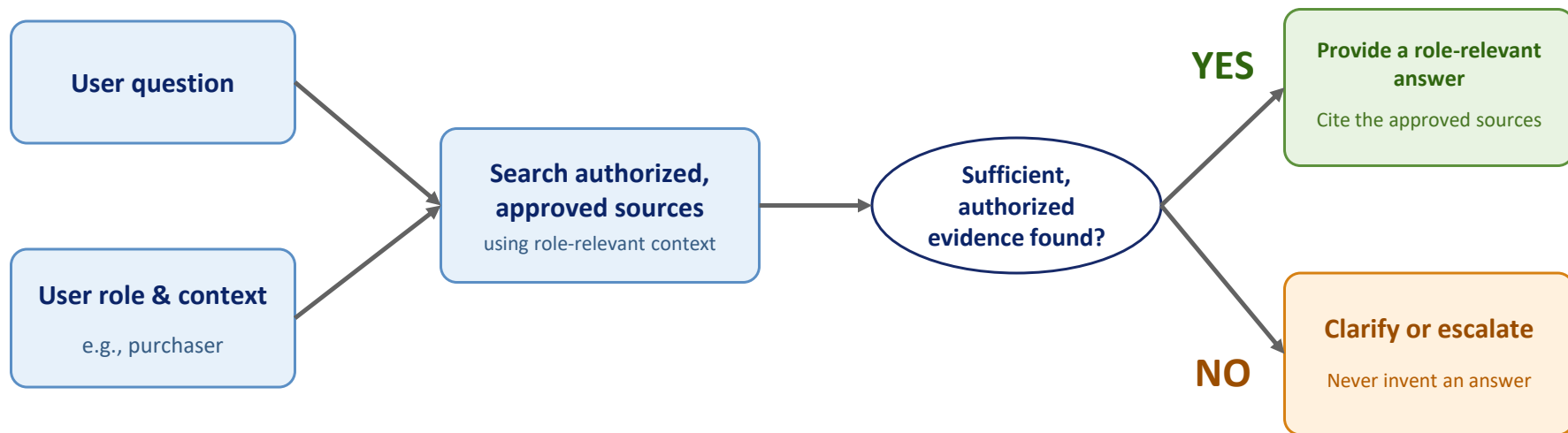
A **role-aware RAG engine** that transforms fragmented context into precise, source-backed action.



Role awareness gives each user the right path



Why should I trust this AI?



One assistant serves two customer journeys



FACULTY & STAFF REQUESTERS

“How do I buy this?”

HOW THE ASSISTANT HELPS

1

Find the right purchasing path

Software, new suppliers, receipts, or CSUBUY profiles

2

Complete each required step

Purchase method, approvals, forms, and invoices

3

Escalate to the right team

Procurement & Contracts or ITS when staff support is needed



VENDORS & SUPPLIERS

“What does CSUB need from us?”

HOW THE ASSISTANT HELPS

1

Get ready to transact

Registration, account setup, and onboarding

2

Submit documents correctly

Invoices and product-review documentation

3

Resolve blockers quickly

Payment status or stalled onboarding with Supplier Management

Demo

 CALIFORNIA STATE UNIVERSITY
BAKERSFIELD | Procurement Assistant

+ New chat

I AM A

Faculty or Staff

 Vendor or Supplier Support Staff


PURCHASING GUIDANCE

What do you need help purchasing?

 How do I buy software or a subscription?

 I need help with a new supplier.

 **How do I create a receipt in CSUBUY?**

 How do I update my CSUBUY profile?

How do I create a receipt in CSUBUY?

Guidance only. This assistant cannot access, submit, approve, or change live procurement records.

Select a pre-prompt for procurement related questions.



Try it Yourself!
d3s79ehfkh7xjx.cloudfront.net



+ New chat

I AM A

Faculty or Staff



Vendor or
Supplier



Support Staff

2. Open **Document Actions** and select **Create Receipt** [S1].
3. Uncheck any purchase-order line that should not be included in this receipt [S1].
4. Select **Create Quantity Receipt** [S1].
5. Enter the receipt name, receipt date, packing-slip number, and tracking information [S1].
6. Confirm the purchase-order lines are accurate, then select **Complete** [S1].
7. Confirm that CSUBUY displays the success message [S1].

SOURCE



S1 Creating a Receipt.mp4

0:06 --> 1:11



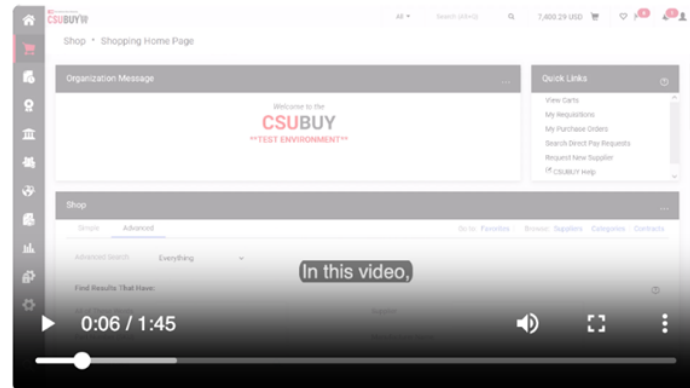
Ask a procurement question

User is given detailed instructions with sources for that task.

Guidance only. This assistant cannot access, submit, approve, or change live procurement records.

SOURCE S1

Creating a Receipt.mp4



CITED SEGMENT

0:06 - 1:11

SOURCE PATH

Receiving/Creating a Receipt.mp4



+ New chat

I AM A

👤 Faculty or Staff

🏢 Vendor or Supplier

🎧 Support Staff



PURCHASING GUIDANCE

What do you need help purchasing?



How do I complete supplier registration after receiving an invitation?



What information should I include with an invoice?



How do I check the status of an invoice or payment?



Who should I contact if supplier onboarding is stalled?

How do I complete supplier registration after receiving an invitation?



Guidance only. This assistant cannot access, submit, approve, or change live procurement records.



+ New chat

I AM A

Faculty or Staff



Vendor or
Supplier



Support Staff

Note: Once your status is **In Progress**, your registration cannot be invited, re-invited, or extended [S2].

For additional help, contact bwholgemuth1@csub.edu.

SOURCES

S1 Supplier Did Not Receive Invitation.pdf

S2 New Supplier Decision Tree.pdf

S3 Requesting a New Supplier.pdf

Ask a procurement question

**User receives instructions +
sources are cited and accessible**

Guidance only. This assistant cannot access, submit, approve, or change live procurement records.

SOURCE S1

Supplier Did Not Receive Invitation.pdf

CSUBUY
A COLLABORATIVE PROCEDURE TO PAY MARKETPLACE

Quick Reference Guide
Supplier Did Not Receive Invitation

When a supplier states they did not receive the invitation email:

- Review the invited email address:
 - Locate the supplier's profile using supplier search (refer to **Supplier Search Tips** in the [SUPPLIERS document folder](#))
 - Click the "view history" hyperlink at the bottom of the left-hand menu
 - Review invited email address
- If the invited email address is correct:
 - Submit a **Re-Invite Request** form
 - When that form becomes approved/completed, inform the supplier the date/time the invitation was sent and to look for an email from noreply@jaggaer.com and to check junk/spam folder
- If the invited email address is not correct:
 - Submit a **New Supplier Request** with new contact info

Try a sample status record:

DEMO-REQ-1001

Requisition awaiting approval

DEMO-PO-2001

Purchase order issued

DEMO-INV-3001

Invoice under AP review

DEMO-VCH-4002

Invoice under AP review



+ New chat

I AM A

 Faculty or Staff

 Vendor or Supplier

 Support Staff



PURCHASING GUIDANCE

What do you need help purchasing?



How do I buy software or a subscription?



I need help with a new supplier.



How do I create a receipt in CSUBUY?



How do I update my CSUBUY profile?

Users can enter an invoice number to check status details

What is the status of DEMO-INV-3001?



Guidance only. This assistant cannot access, submit, approve, or change live procurement records.



+ New chat

I AM A

Faculty or Staff



Vendor or
Supplier



Support Staff

YOU

What is the status of DEMO-INV-3001?



CSUB PROCUREMENT ASSISTANT

I found the invoice DEMO-INV-3001. Its current status is **In Accounts Payable review**. I opened the status details on the right.

STATUS DETAILS



DEMO-INV-3001

In Accounts Payable review



Ask a procurement question



Guidance only. This assistant cannot access, submit, approve, or change live procurement records.

STATUS

DEMO-INV-3001



INVOICE

Equipment delivery invoice

In Accounts Payable review

Updated July 16, 2026 at 11:40 AM

PROGRESS

Step 2 of 4



Invoice received



AP review



Payment
scheduled



Paid

RECORD DETAILS

INVOICE TOTAL

\$2,480.00

SUPPLIER

Technology Supply Co.

PURCHASE ORDER

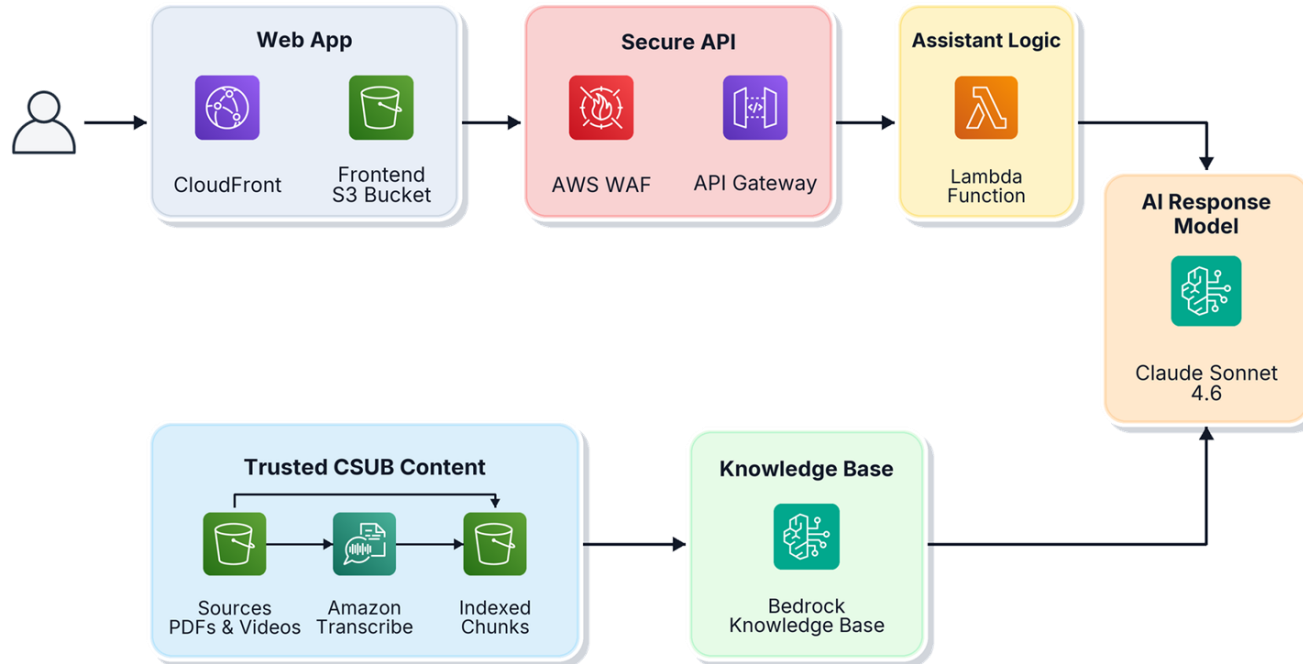
PO-2003

INVOICE DATE

July 11, 2026

**The assistant
shows the current
invoice status and
relevant details.**

AWS Architecture



Special thanks to:



CALIFORNIA STATE UNIVERSITY
BAKERSFIELD



Mentor Maciej Zukowski

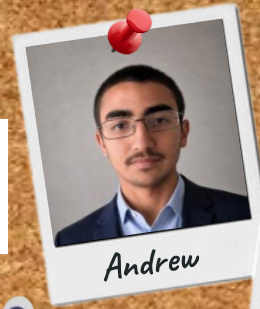
MEMORIES



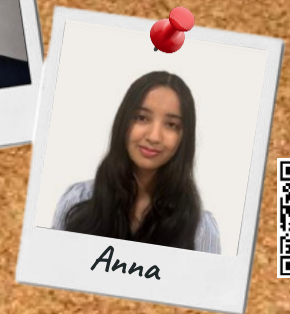
July 2026



Team 3



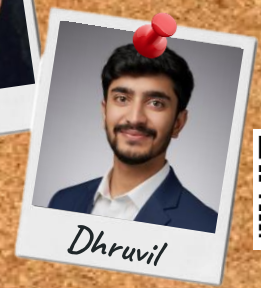
Andrew



Anna



Jaydon



Dhruvil

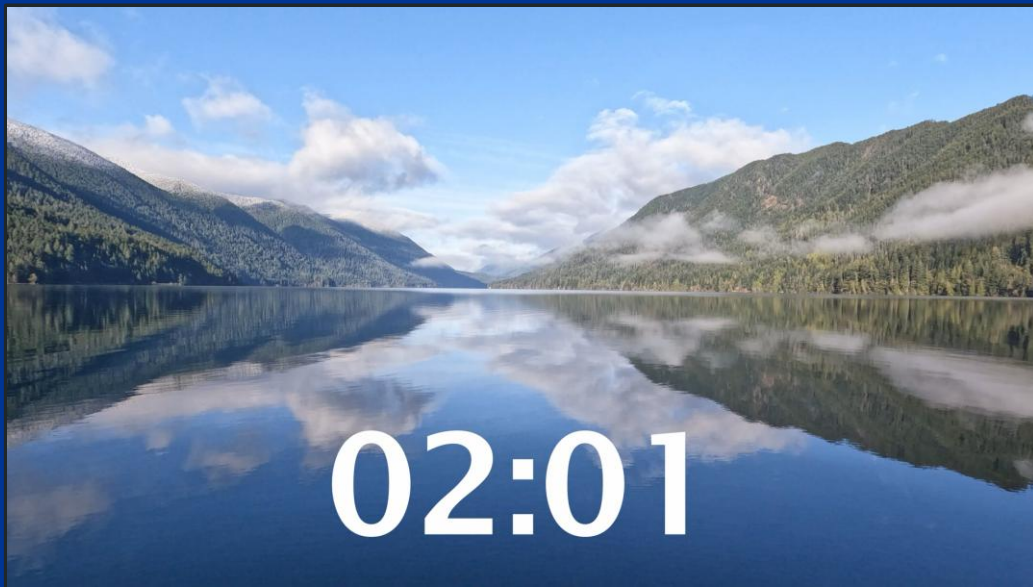


Scavenger Hunters



Team Work

PROCURE  TIVE



02:01

Q & A time!

