**Project Title:**

Book of Business (BOB)

**Submitter Names**

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**Project Participants**

The Book of Business (BOB) application was created with a small agile team that completed a detailed 
needs assessment and requirements document to ensure the development of an effective, efficient, and 
cost savings application.

- Leader: Isabella Bryant-Parkinson  
- Programmer: Wahono (John) Widjaja  
- Team Members: Cheryl Kettnich, Erika Wilson

**Project Description**

The Book of Business (BOB) identifies sponsored research funds and indexes active in the Vice Chancellor 
of Health Sciences (VCHS). The application is expandable to meet the reporting needs of the entire 
University of California, San Diego (UCSD) campus. The project scope could eventually expand to all UC 
campuses if interest arises in the aims of this project. A collaborative effort between campus IT services, 
business leaders, financial managers, and system users culminated in a system launch that ensures 
transparent management of enterprise research administration.

Before this application was built, it would take over 5 business days to pull a variety of reports via various 
queries and system to learn and understand an investigators and/or departments research book of 
business. In the midst of campus shared service implementation, this lengthy time frame was 
unacceptable. Many investigators and departments maintained shadow systems to meet their research 
reporting needs. The implementation of BOB eliminates the need for department shadow and investigator 
systems. The BOB application reduces the time to pull and review a book of business from five days to a 
few minutes.
Significant costs savings will be actualized because of the successful execution of this application. A detailed analysis of cost savings reflects a 700K savings annually. (A detailed cost savings analysis can be supplied upon request.)

The BOB application will substantially improve the ability of investigators, leaders, departments, and fund managers to manage sponsored research funds. The Book of Business application allows for the fiscal and administrative management of a half billion dollars in awarded sponsored research dollars to UCSD, Vice Chancellor Health Sciences (VCHS).

The application is created to generate data outlining funds and indexes owned by Principal Investigators (PI), fund managers, and/or departments based on the data points selected. The BOB application pulls data from the UCSD chart of accounts, fund structures, chart of account override, organization hierarchy structure and the campus data warehouse. The application is designed to display a book of business by a variety of data points. A full list of BOB search and display fields are listed below.

The application provides a suite of three reports that allows data to be quickly displayed in a clean streamlined dashboard. The Book of Business application provides valid, accurate, transparent, and measureable reporting performance metrics for sponsored research activities.

**BOB Search Fields:**
- Org Title
- Organization
- Fund
- Index
- PI
- Fund Manager (report 3 only)

**BOB Display Fields:**
- FUND #
- INDEX #
- From Award Date
- To Award Date
- Program Code
- ORG
- Total Direct Allocations
- Total Direct Expenditures
- Liens
- Direct Cost Balance
- Sponsor Type
- PI
- Fund Manager (report 3 only)

**Book of Business Reporting Services:**
Dashboard Report 1 – Displays all active funds and indexes managed by a department level.
Dashboard Report 2 – Displays funds and indexes managed by the Research Service Core.
Dashboard Report 3 – Displays funds and indexes managed by a Research Service Core fund manager.
Technology Utilized in the Project

The BOB project leveraged the campus chart of account systems, the data warehouse, and current organization and fund hierarchy structures. Data was combined from multiple systems via a programming effort to create a simple streamlined frontend system that provides accurate and active research and financial data to precisely reflect the book of business an investigator was leveraging.

The RSC Book of Business is a business application leveraging multiple technologies. The main engine of BOB is designed and implemented using Microsoft .NET Framework and C# technologies. BOB interfaces with the UCSD Data Warehouse (DB2) and NIH’s RPPR databases to compile relevant award data and financial tracking for fiscal reporting. The program extracts millions of records from the DB2 database and populates a MySql database on a daily basis. Using stored procedures, the data is further filtered and manipulated in order to convert raw data into information critical for fiscal management of awards.
Timeframe of Implementation:

The project was active and in production in less than a 12 month time frame. The first eight months were spent on needs assessments, business requirements and programming. Two months were spent on testing to prototype. There was one month rollout and deployment period.

URLs

The URL requires login because of the fiscal and sensitive nature of the data provided in the application. Please request access from Isabella Bryant-Parkinson at ibryantparkinson@ucsd.edu or at 858-822-3551.
Objective Customer Satisfaction Data

1. Donna Smith
   Support & Outreach Services Cost Transfers & ECERT Accountant
   Office of Post Award Finance

   **Client/User Feedback:**
   “The Health Sciences Book of Business (BOB) improves Principal Investigator and Staff services and achieves increased personnel efficiency through a powerful tool which –
   - Provides extensive financial information in a user-friendly automated resource
   - Prepares comprehensive enterprise reports enhancing timely decision-making
   - Supports effective budget, compliance, financial, and personnel management”

2. Belinda Fitzgerald
   Business Officer
   Anesthesiology

   **Client/User Feedback:**
   “The ability for both the PI’s and managers to have "all encompassing" books of business reporting tool generated at periodic intervals is critical for analyzing and projecting our research resources and expenses. This comprehensive tool allows us to assess the entire PI portfolio of funds which are critical to understand his/her complete economic picture. No planning can move successfully forward without such a comprehensive reporting tool. A pivotal Key to fiscal viability is understanding first where you and where you are projecting toward. These reports provide that for us.”

3. Dani Elias
   Fund Manager Supervisor
   Research Service Core

   **Client/User Feedback:**
   “The Book of Business allows users to understand a department’s funding portfolio with just a few clicks. As a new employee to UCSD, BOB’s ease-of-use has really allowed me to better understand the funding picture of the departments I serve in a short amount of time. BOB takes away the mystery that often comes with financial reporting, as it allows you to see everything in a department, including old funds that are often forgotten about during staffing transitions. It also provides great visibility into the post-award portfolio of the fund managers I supervise. Overall, BOB is a great tool that will contribute to increased efficiency and visibility across campus.”

4. Dieu Nguyen
   Pediatrics Supervisor
   Pediatrics

   **Client/User Feedback:**
   I find the BOB a great tool that helps fund managers and leaders greatly with their fund management.