

Quality Enhancement Support Scheme

Progress Report	Project No. : T01/QESS/2013
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Reporting Period : From July 2014 (month/year) to December 2014 (month/year)

Part A

Project Title : **Collection Sharing and Information Discovery System with Enriched Digital Content (CSIDS)**

Name of Grantee : The Open University of Hong Kong (OUHK) (Principal Grantee)
 Caritas Institute of Higher Education (CIHE) (joint Grantee)
 Chu Hai College of Higher Education (CHCHE) (joint Grantee)
 Hong Kong Shue Yan University (HKSJU) (joint Grantee)
 Tung Wah College (TWC) (joint Grantee)

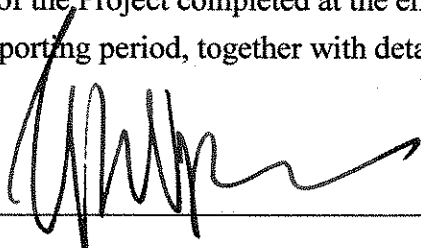
Project Period : From January 2014 (month/year) to December 2016 (month/year)

Part B

Please use separate A4-size sheets to report the progress with regard to the following aspects:

1. Types and brief descriptions of Project activities held/completed during the reporting period (*the information may be presented in the form of a table*).
2. The dates, time, venues and number of participants / beneficiaries of Project activities held, and resources (e.g. equipment, manpower) used for the implementation of Project activities.
3. Project milestone(s) and deliverables attained at the end of the reporting period and evidence showing the attainment of milestones and deliverables.
4. The percentage, in terms of key tasks, of the Project completed at the end of each reporting period.
5. Project variation*, if any, during the reporting period, together with details and justifications.

Signature of Authorised Person: _____



Name of Authorised Person : Prof Yuk-Shan WONG

President

Position of Authorised Person : The Open University of Hong Kong

Date : 21 January 2015



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* A *separate* written application should be submitted to the Grantor for *prior* written approval.

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1. Project activities held/completed during the reporting period

Dates, time and venues	Brief descriptions of activities and resources used for implementing the Project *	Number and types of participants (if applicable)
Project Management – in order		
CPT Meeting and IPT Meeting		
July 2014 - Dec 2014, OUHK	Sixteen Central Project Team (CPT) meetings have been held since January 2014 with project team members and representatives of the vendor “ExLibris” for the implementation of the Project. Six of them were held during this period.	For membership of CPT and IPT, please refer to the institutional Agreement
July 2014 - Dec 2014, CIHE	Nine Internal Project Team (IPT) meetings have been held by the CIHE for the implementation of its “ALEPH” Library System since January 2014. Five of them were held during this period.	
July 2014 - Dec 2014, TWC	Seven Internal Project Team (IPT) meetings have been held by the TWC for the implementation of its “ALEPH” Library System since January 2014. Five of them were held during this period.	
July 2014 - Dec 2014, CHCHE	Five Internal Project Team (IPT) meetings have been held by the CHCHE for the implementation of its “ALEPH” Library System since January 2014. Three of them were held during this period.	
Document Sharing and Experience Sharing Session		
July 2014 - Dec 2014	A total of 1,142 documents have been uploaded since January 2014. 636 of them were uploaded during this period.	CPT members
18 Sept 2014	An experience sharing session was conducted by the OUHK staff with the members on record management in the “SFX” Knowledge Base and Authority Control in the “ALEPH” Library System.	CPT members and staff members of participating institutes
Project Staff - Recruitment has been difficult, staff turn-over has shortened the contract period of individual project post which has made the recruitment even more difficult.		
July 2014 - Dec 2014, OUHK	One Library Assistant left on 30 August 2014 and a new Library Assistant reported for duty on 2 September 2014. One Assistant Librarian II joined on 29 December 2014. It has taken nearly one year to recruit a suitable candidate to fill the ALII post.	OUHK
July 2014 - Dec 2014, CIHE	The post of Library Assistant (Project) fell vacant on 17 November 2014 and was filled on 1 December 2014. The Project System Analyst post was still vacant as at 31 December 2014.	CIHE
July 2014 - Dec 2014, TWC	A new Project Assistant Information Technology Manager joined on 3 November 2014 as the Project System Analyst left on 27 August 2014 of	TWC

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	his own accord. One Assistant Librarian II (Systems) post was still vacant as at 31 December 2014.													
July 2014 - Dec 2014, CHCHE	Recruitment of the project staff started. The posts ALII (systems), LAII and ALII (project admin.) were filled in October and November 2014 respectively. One Analyst Programmer II post was still vacant as at 31 December 2014.	CHCHE												
Jan 2014 - Dec 2014	To handle the project workload, some institutes have used their own funding to recruit additional project staff, some of them were posts cut by EDB during the project application stage): <table border="1" data-bbox="336 696 1096 1003"> <thead> <tr> <th>Institutes</th> <th>Additional staff*</th> </tr> </thead> <tbody> <tr> <td>OUHK</td> <td>One APII, two LAs</td> </tr> <tr> <td>CIHE</td> <td>NIL</td> </tr> <tr> <td>CHCHE</td> <td>NIL</td> </tr> <tr> <td>HKSYU</td> <td>Half an ALII, half an LA</td> </tr> <tr> <td>TWC</td> <td>One APII, one LA</td> </tr> </tbody> </table> <p>*Staff banding of APII, ALII, LA is used to reflect the salary banding and entry requirements.</p>	Institutes	Additional staff*	OUHK	One APII, two LAs	CIHE	NIL	CHCHE	NIL	HKSYU	Half an ALII, half an LA	TWC	One APII, one LA	CPT members
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TWC	One APII, one LA													
Fund Handling and Grant Distribution – in order														
13 Aug 2014	Grant (including the 1 st payment received and the 2 nd payment to be received) distribution among members for eBook collection building was confirmed in the 12 th CPT meeting.	CPT members												
3 Sep 2014	OUHK received the 2 nd payment of the Project Grant from the EDB	EDB, OUHK												
Others														
13 Nov 2014, OUHK	Three representatives from the EDB visited the OUHK to discuss and review the progress of the Project													
Publication/ Promotion of the Project – better than planned														
29 Oct 2014	The OUHK Library presented a paper titled “The CSIDS Project: Building a Shared eBook Collection through Collaborative Purchase” in the 28th Annual Conference of the Asian Association of Open Universities http://aaou2014.ouhk.edu.hk/ organized by the AAOU and the OUHK, 28-31 October 2014. For an abstract of the article, please visit the following site: http://aaou2014.ouhk.edu.hk/abs/324.html	OUHK												
12-15 Nov 2014	One representative each from OUHK and TWC attended the 2014 China Consortium of ExLibris Products User Group (CCEU) Meeting co-organized by ExLibris and Nanjing Library in Nanjing, China. The meeting is an annual event intended for ExLibris users in both China and	OUHK, TWC												

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	Hong Kong. The QESS project was introduced to the CCEU Meeting during the informal networking. New developments observed in the Meeting have been reported to the Central Project Team for information.	
System Implementation – progress as planned except Interlibrary loan		
Project Website, Discovery Tool “PRIMO” and Link Resolver “SFX”		
13 Aug 2014	TWC’s link resolver “SFX” for linking full text articles was launched. E-Journals and databases of TWC could be accessed by clicking “SFX” from the library resources website http://www.twc.edu.hk/library/e-resources and from Google Scholar http://scholar.google.com.hk/ .	TWC
14 Aug 2014	HKSYU’s SFX was launched. E-Journals and databases of HKSYU could be accessed by clicking the pink color “Research Tools/ Title lists” tab from the library website http://www.hksyu.edu.hk/lib/ and from Google Scholar http://scholar.google.com.hk/ .	HKSYU
10 Sept 2014	CHCHE’s SFX was launched. E-Journals and databases of CHCHE could be accessed by clicking “E-Journal” on the left frame in the following library “Electronic Resources” library webpage: http://lib.chuhai.hk/?page_id=11 and from Google Scholar http://scholar.google.com.hk/ .	CHCHE
15 Sept 2014	CIHE’s SFX was launched. E-Journals and databases of CIHE could be accessed by clicking “SFX Linking Service” on the left frame in the following “Electronic Resources” page from the library website: http://library.cihe.edu.hk/selection/electronic_resources/electronic_resources.htm and from Google Scholar http://scholar.google.com.hk/ .	CIHE
24 Nov 2014	Project website www.csids.edu.hk was launched for the public.	CPT members
24 Nov 2014	HKSYU’s next generation searching and discovery tool “Primo” was launched. One-stop search for the catalogue and articles HKSYU subscribed to could be accessed via the library homepage http://www.hksyu.edu.hk/lib/ or via the Project website http://primo.csids.edu.hk/primo_library/libweb/action/search.do?vid=HKSYU .	HKSYU
ALEPH Library System for CIHE/TWC/CHCHE		
July 2014 - Aug 2014	First round of data migration testing has been completed. Data Migration Reports have been sent to CIHE/TWC/CHCHE for checking and data clean up.	ExLibris, CIHE/TWC/CHCHE
4 Aug 2014 – 8	First Round Training of the “ALEPH” Library System has been	ExLibris,

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Aug 2014	completed.	CIHE/TWC/CHCHE									
Aug 2014 – Sep 2014	Extra round of data migration testing with program modified to fix problems identified in the last migration exercise. Data Migration Reports were sent to CIHE/TWC/CHCHE for further checking and data clean up.	ExLibris, CIHE/TWC/CHCHE									
Sep 2014 – Dec 2014	Second round of data migration testing with program further modified to fix problems identified in the previous migration exercise. Data Migration Reports were sent to CIHE/TWC/CHCHE for further checking and data clean up.	ExLibris, CIHE/TWC/CHCHE									
13 Oct 2014 – 17 Oct 2014	Second Round Training of the “ALEPH” Library System has been completed.	ExLibris, CIHE/TWC/CHCHE									
Nov 2014 – Dec 2014	Specifications for migration of circulation data were confirmed. Development of the patron loading program was in progress.	ExLibris, CIHE/TWC/CHCHE									
8 Dec 2014 – 12 Dec 2014	Third Round Training of the “ALEPH” Library System has been completed.	ExLibris, CIHE/TWC/CHCHE/ HKSYU/OUHK									
Interlibrary Loan (ILL)											
July 2014 – Dec 2014	Installation and configuration of <i>ISO ILL Module</i> for HKSYU started in July 2014 has encountered technical problems. The vendor “Innovative Interfaces Inc” suggested in late November 2014 installing the <i>ISO ILL Module</i> on the older version of their ILS, i.e. INNOPAC. The installation of <i>ISO ILL Module</i> on INNOPAC will be started later.	HKSYU									
Sep 2014 – Dec 2014	Discussion on the ILL Requirements has been in progress since September 2014.	CPT members									
Collection Development and eBook Purchases – better than planned, eBook titles with price up to HK\$2,200 with shared access have been purchased since December 2014.											
July 2014 - Dec 2014	13 proposals from eBook vendors have been accepted by the CPT and 11 license agreements have been signed since January 2014. 3 proposals and 6 license agreements were accepted / signed within this period.	CPT members									
July 2014 - Dec 2014	No. of new titles collected by the OUHK and sent to member libraries for selection: (Figures in italics are the cumulative total since January 2014.)	OUHK									
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July 2014 - Dec 2014	<p>Subject keywords and profiles set up for the following disciplines:</p> <ul style="list-style-type: none"> • Fine Arts • Philosophy & Psychology • Law • Geography • History & Tourism (Cultural and Heritage) • Political Science 	CPT members																															
July 2014 - Dec 2014	<p>eBook recommendations submitted by member libraries: (Figures in italics are the cumulative total since January 2014.)</p> <table border="1" data-bbox="336 689 1161 1397"> <thead> <tr> <th rowspan="2">Institutes</th> <th colspan="3">No. of recommendations submitted</th> </tr> <tr> <th>English</th> <th>Chinese</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>OUHK</td> <td>1,892 <i>(5,384)</i></td> <td>210 <i>(1,789)</i></td> <td>2,102 <i>(7,173)</i></td> </tr> <tr> <td>CIHE</td> <td>2,958 <i>(6,444)</i></td> <td>688 <i>(1,044)</i></td> <td>3,646 <i>(7,488)</i></td> </tr> <tr> <td>CHCHE</td> <td>1,704 <i>(3,662)</i></td> <td>1,644 <i>(3,116)</i></td> <td>3,348 <i>(6,778)</i></td> </tr> <tr> <td>HKSYU</td> <td>3,445 <i>(7,971)</i></td> <td>458 <i>(608)</i></td> <td>3,903 <i>(8,579)</i></td> </tr> <tr> <td>TWC</td> <td>2,144 <i>(5,054)</i></td> <td>626 <i>(634)</i></td> <td>2,770 <i>(5,688)</i></td> </tr> <tr> <td>Total</td> <td>12,143 <i>(28,515)</i></td> <td>3,626 <i>(7,191)</i></td> <td>15,769 <i>(35,706)</i></td> </tr> </tbody> </table>	Institutes	No. of recommendations submitted			English	Chinese	Total	OUHK	1,892 <i>(5,384)</i>	210 <i>(1,789)</i>	2,102 <i>(7,173)</i>	CIHE	2,958 <i>(6,444)</i>	688 <i>(1,044)</i>	3,646 <i>(7,488)</i>	CHCHE	1,704 <i>(3,662)</i>	1,644 <i>(3,116)</i>	3,348 <i>(6,778)</i>	HKSYU	3,445 <i>(7,971)</i>	458 <i>(608)</i>	3,903 <i>(8,579)</i>	TWC	2,144 <i>(5,054)</i>	626 <i>(634)</i>	2,770 <i>(5,688)</i>	Total	12,143 <i>(28,515)</i>	3,626 <i>(7,191)</i>	15,769 <i>(35,706)</i>	CPT members
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July 2014 – Dec 2014	Some vendors have provided free perpetual access to selected eBooks in the purchase:			OUHK
	(Figures in italics are the cumulative total since January 2014.)			
		English	Chinese	
No. of free eBooks	917 <i>(917)</i>	- -	917 <i>(917)</i>	

* Evidence showing the attainment of milestones scheduled for completion during the reporting period should be attached (e.g. photos, learning materials, webpage screens, promotion leaflets / posters, relevant reports, etc.).

2. The percentage, in terms of key tasks, of the project completed at the end of the reporting period

Milestones scheduled for completion during the reporting period **	% attained	Remarks
➤ Posting of project news in websites of participating institutions	100%	
➤ Purchase of eBooks	100%	
➤ Installation of hardware for ILS in CHCHE	100%	
➤ Development of ILS in TWC	100%	
➤ Development of CSIDS in OUHK	100%	
Overall Project	34%	

** Please seek prior approval from the Education Fund Secretariat if the project milestones cannot be completed at the end of the reporting period.

3. Project variation (a separate written application should be submitted to the Education Fund Secretariat for prior written approval.)

Descriptions of variations (e.g. change of the project scope or duration, deferral of completion date, relocation of an amount exceeding 10% between items of expenditure in the budget)	Date of approval sought from Education Fund Secretariat
“Launching of the ILL Module in the HKSYU” has been rescheduled to December 2015 due to technical reasons and approval has been obtained from the EDB.	22 December 2014

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4. Financial position as at the end date of the reporting period (31 December 2014)

Expenditure items	Approved budget (HK\$) (a)	Committed or actual expenditure (HK\$) (b)	Balance (HK\$) [(a)-(b)]
a. Manpower	17,784,894	3,370,050.07	14,414,843.93
b. Equipment / Facilities	601,778	487,254.00	114,524.00
c. Services	5,612,172	5,564,975.60	47,196.40
d. General Expenses	25,145,000	8,538,925.45	16,606,074.55
e. Others	1,628,816	76,774.11	1,552,041.89
Total	50,772,660	18,037,979.23	32,734,680.77
<i>Project Income (if any)</i>			95,304.30
Total Balance			32,829,985.07