

Integrating and Leveraging Metadata in a Shared Environment : the University of Macau Library Experience

Priscilla Pun
Head of Technical Process
University of Macau Library

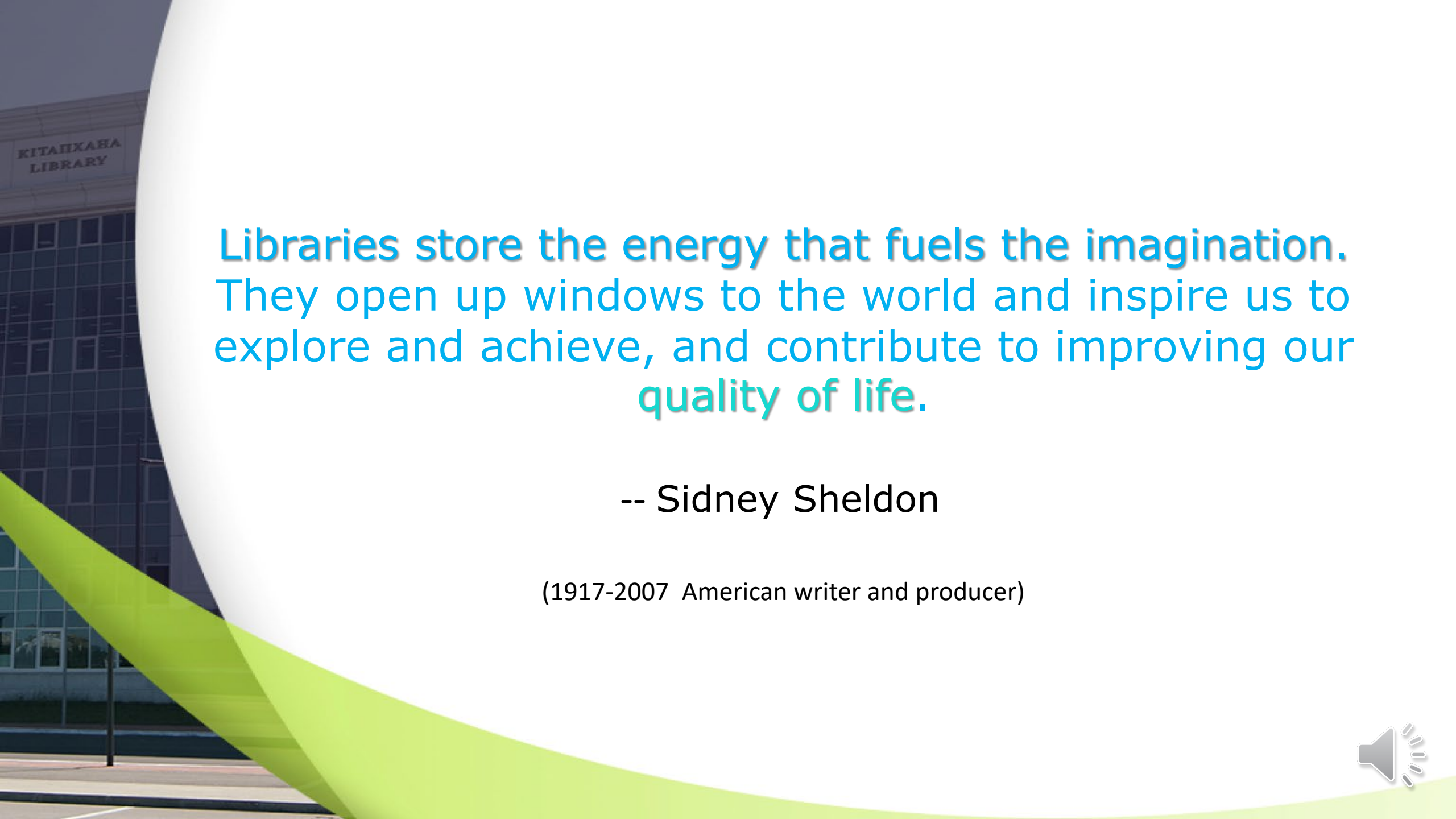


澳門大學
UNIVERSIDADE DE MACAU
UNIVERSITY OF MACAU



29 June 2021





**Libraries store the energy that fuels the imagination.
They open up windows to the world and inspire us to
explore and achieve, and contribute to improving our
quality of life.**

-- Sidney Sheldon

(1917-2007 American writer and producer)



Table of Contents

- Background
- The UM Library Development & Metadata Standards
- Library Metadata in a Shared Environment
- Future Challenges



Background



Macao Special Administrative Region



Area: ~33 km²

Population: 682,500

Density: 21,000 ppl/km²

Language: Chinese (96%),
Portuguese (2%),
English

Economy: Tourism



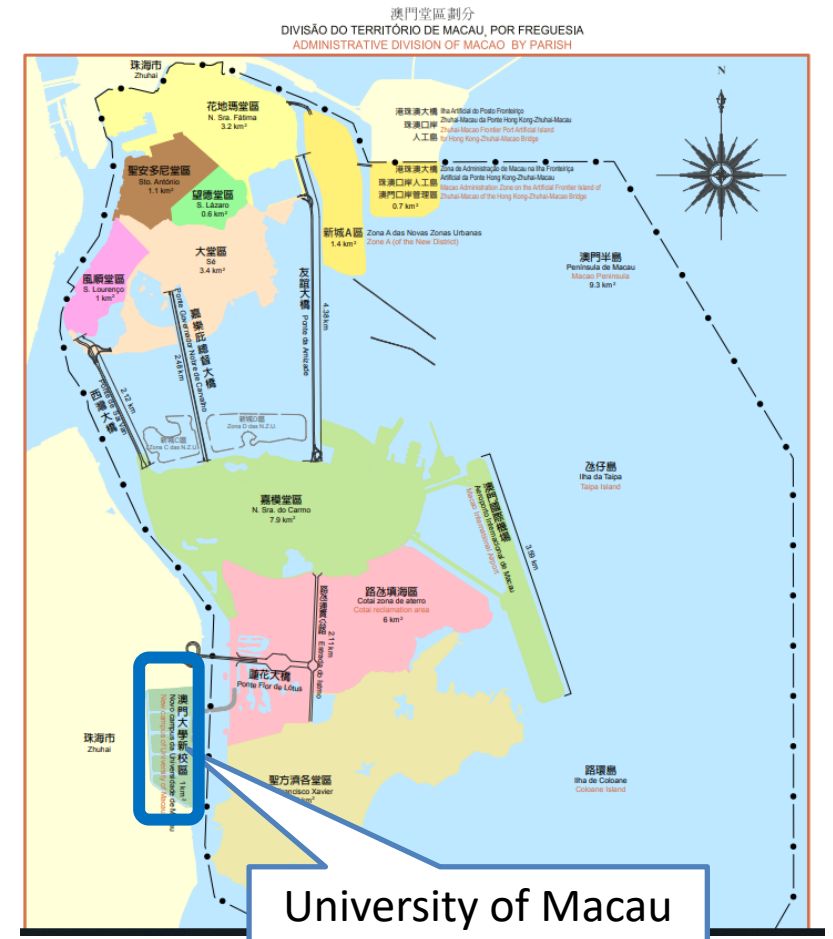
澳門大學
UNIVERSIDADE DE MACAU
UNIVERSITY OF MACAU



University of Macau

- The only internationalized public comprehensive university in Macao
- Main medium of instruction:
English; Some programs in Chinese or Portuguese
- 80% of its faculty members from outside Macao

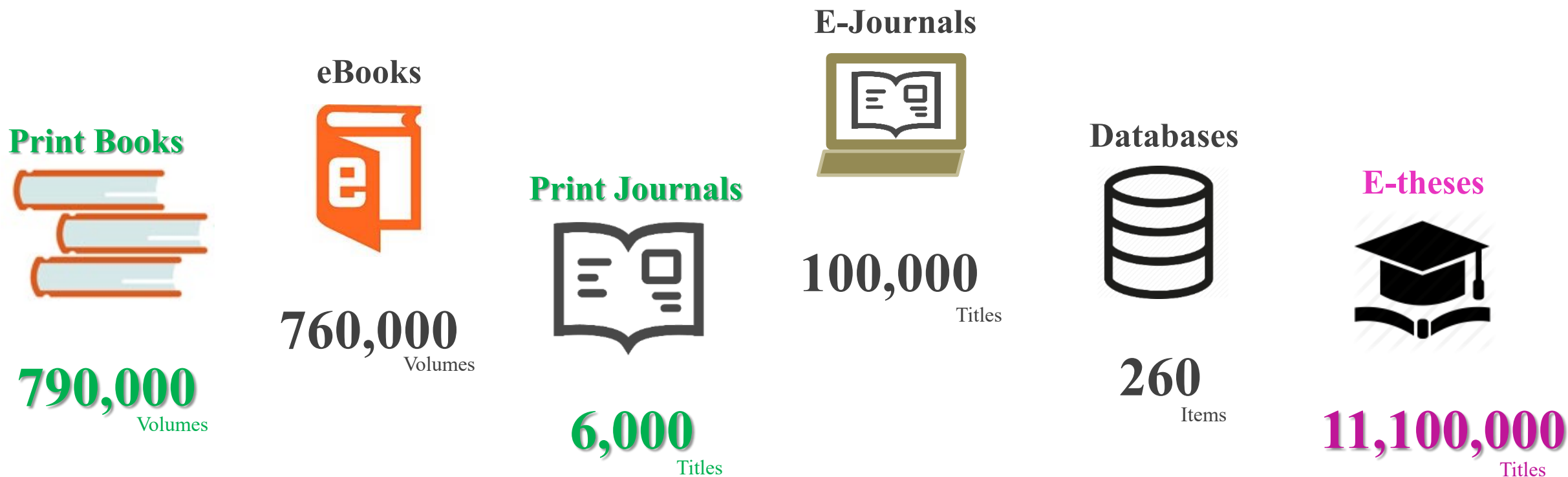
Mainland China	Portugal	U.S.A.	Canada	Australia	Singapore	Others
60.8%	15.2%	8.2%	3.2%	2.0%	1.5%	9.1%



Founded in 1981	Students 10,000+	Academic Staff 600+	Asia University Rankings 37th	World University Rankings 301st - 350th	International Outlook 6th
---------------------------	----------------------------	-------------------------------	--	---	--



UM Library resources at a Glance



Total stocks of **12.6 million items/vols**

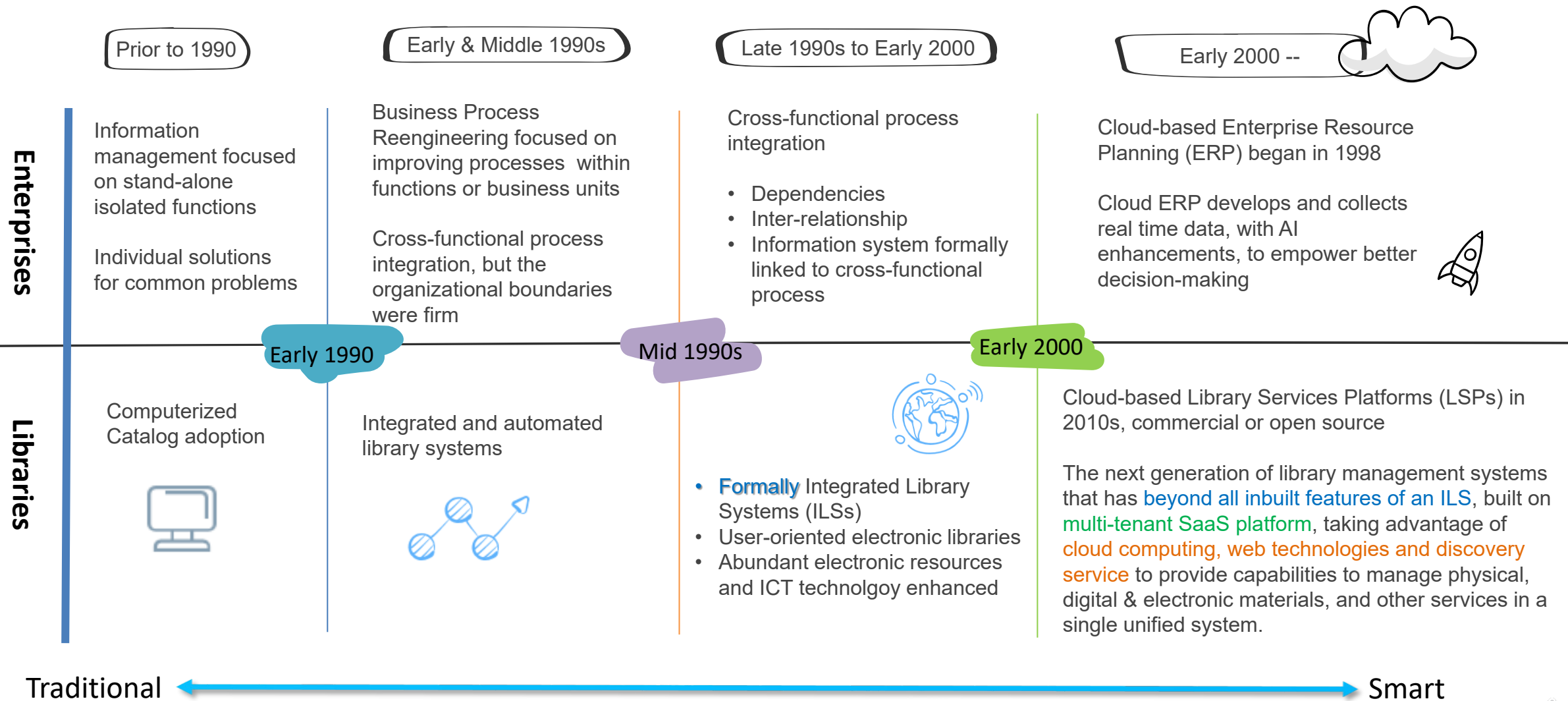
Open Access Resources



The UM Library Developme nt & Metadata Standards



Transition of Libraries as Enterprises



Transition of the UM Library in 5 Phases

Early & Middle 1990s

Phase 2

In 1993, adopted **Dynix** as its initial automatic library system.

In 1994, connected to the Internet and started to surf websites.

Started to access the bibliographic data from libraries in Hong Kong.

Prior to 1990



Early 1990

Phase 1

In 1982, equipped with a mainframe computer and converted most of its English card catalog into computerized data, which is the first computerized library catalog in Macao.

Mid 1990s



Early 2000

Late 1990s to Early 2000

Phase 3

During late 1990s, the Internet, search engines, paperless prediction, etc.

In 1996, introduced CD-ROM tower. Then commenced subscribing to e-journals on CD-ROM and web-based resources.



2010s--

2004 – 2010s

Phase 4

In 2004, adopted **Innovative Millennium**, a highly integrated library system, which made an one-stop-search hybrid library for UM.

Integrated and redesigned the business processes of acquisition and cataloging.

Macau Academic Library Alliance (MALA) since 2014

2010s - current

Phase 5

Adopted Discovery Service EDS 2013-2019
Primo(VE) 2019- current

In 2020, migrated to the LSP **Alma**.

Bibliographic data of a library's collection is the legacy of a library

Growth Through Creativity

Growth Through Direction

Growth Through Delegation

Growth Through Coordination

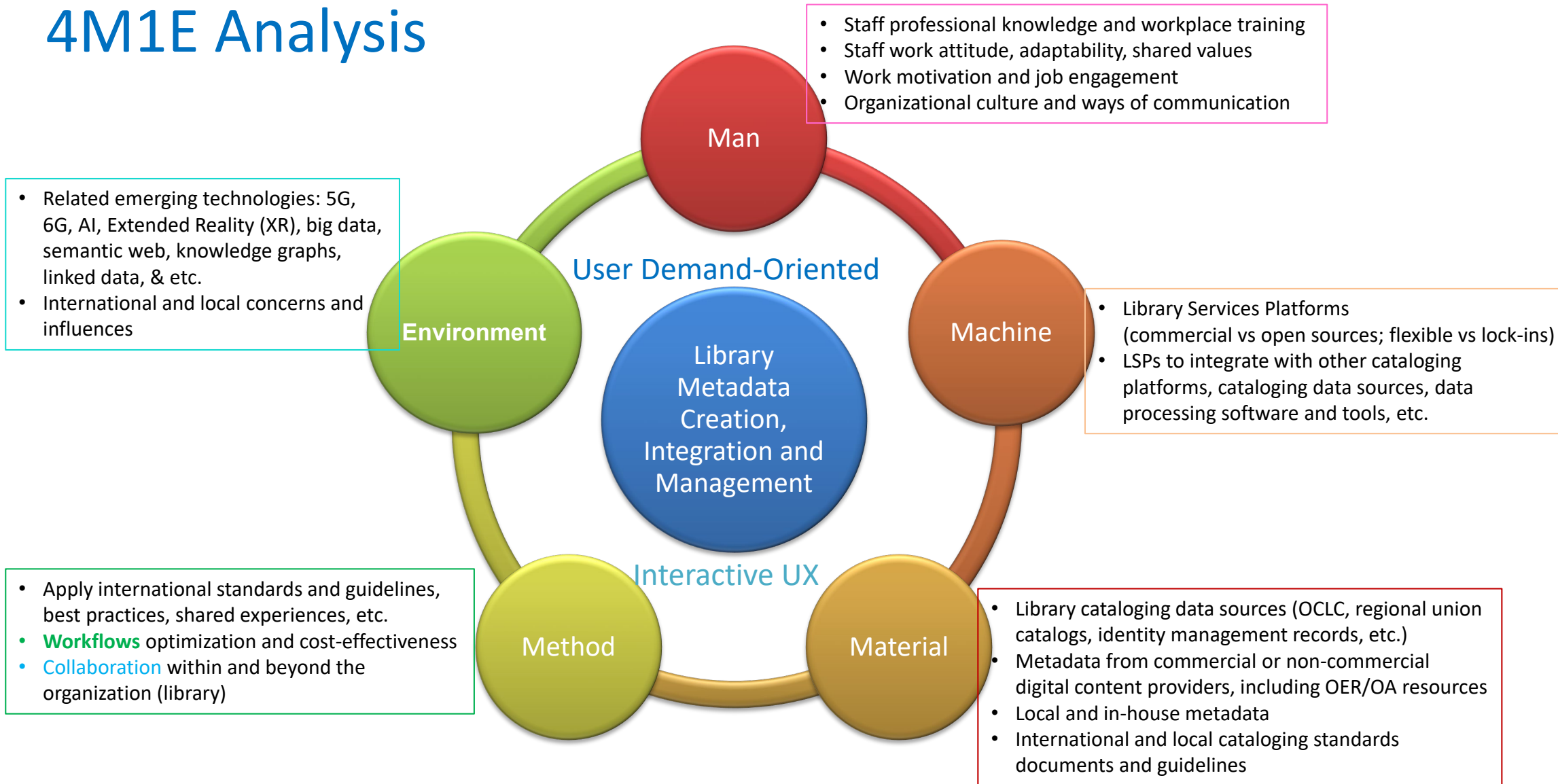
Growth Through Collaboration

Growth Through Alliances

Greiner's Organization Growth Model



4M1E Analysis



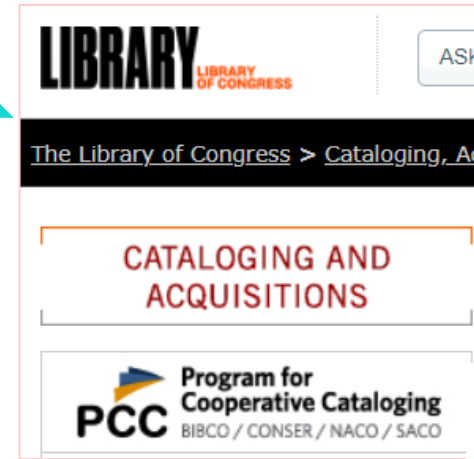
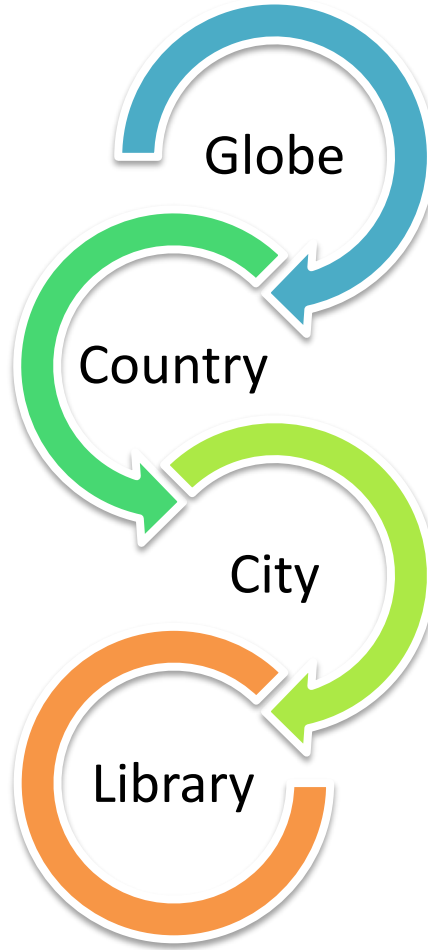
Think Globally, Act Locally



Global/country development, standards and policies to be translated into policies and practices at the city/library levels.

UM Library's Cataloging Policies and Procedures

https://library.um.edu.mo/lib_services/catalog/cat_procedures_en



Country/city/library level projects and initiatives to drive development and policy changes at the city/country/global levels.



Names of Persons

<https://www.ifla.org/node/4953>

The IFLA Cataloguing Section has published a list including conventions for 105 countries in 1996. Work to update the *Names of Persons* document has been carried out in 2009 and 2010.



CATALOGING POLICIES AND PROCEDURES

SERVICES / CATALOGING SERVICES / CATALOGING POLICIES AND PROCEDURES

Services -

Acquisition Services

Cataloging Services

Circulation Services

Electronic Theses & Dissertations Services (Intranet ONLY)

Interlibrary Loan Services

Library Facilities and Services for People with Disabilities

Library I.T. Services

Library Instruction

CATALOGING POLICIES AND PROCEDURES

- Classification Manual
- Manual for Classification K – General Law : for European Union
- Table for History of Macau DS 796 M3+
- Cataloging Manual
- Guideline for Evaluating & Selecting Internet Resources
- Guideline for Cataloging e-Books
- Guideline for Cataloging e-Journals
- Guideline for Cataloging Website
- RDA Basic Guideline for Copy Cataloger
- MARC21 Content Designators - Material Type and Bibliographic Level
- Five Radicals Count Chinese Author Table (Copyright © 2010, Macao Library & Information Management Association)
- Chinese Romanization Spelling and Vocabulary (Liang Chin Nan, 1982)

RDA BASIC GUIDELINE FOR COPY CATALOGING

UM Library

Audience: people who copy catalog

Scope: primarily books; though most criteria are applicable to other formats as well

Last updated: 19 Feb 2016

Introduction:

Both AACR2 records and RDA records are acceptable in INNOPAC now. Full-level RDA records are always preferable whenever you do copy cataloging (see table below). Do NOT revise Full-level RDA records to AACR2 ones no matter what kind of languages they are. If no full-level records match, see the standards documents for cataloging AACR2 records (Except the case i.e. "Manual input for encoding levels that are less than full")

AACR2 records	RDA records	Preferable cataloging decision
Full level available	N/A	AACR2 records (Copy cataloging)
N/A	Full level Available	RDA records (Copy cataloging)
Full level Available	Full level Available	RDA records (Copy cataloging)
N/A	N/A	AACR2 records (Original cataloging)

Manual input for encoding levels that are less than full:

If the only information missing from a bibliographic record is the physical description (3XX fields), and you have been trained to make the changes in RDA to both the 040 and 3XX fields (see table below), then do add the physical description to the bib record. Otherwise, route it to a senior librarian.

Distinctive features of RDA:

- Distinctive elements — RDA records contain in the 040 field \$e rda, and the fields 336, 337, and 338
- Capitalization — Information may now be capitalized exactly as it is on the preferred source of information
- Brackets [] — each subfield containing missing information is bracketed individually
- Abbreviations — abbreviations are generally not used in RDA
- Transcribe what you see — transcribe as found on the source, transcription fields





Names of Persons

Names of Persons - Arabic names (2018)

Names of Persons - Hebrew names (2018)

Names of Persons - Chinese names (2020)

Countries files:

Names of Persons - Albania (2016)

Names of Persons - Argentina (2010)

Names of Persons - Armenia (1977)

Names of Persons - Australia (2015)

Names of Persons - Azerbaijan (1977)

Names of Persons - Belarus (1997)

Names of Persons - Belgium (1995)

Names of Persons - Bosnia and Hercegovina (1995)

Names of Persons - Brazil (2016)

Names of Persons - Bulgaria (2016)

Names of Persons - Canada (1994)

Names of Persons - Chile (2016)

Names of Persons - Croatia (2010)

Names of Persons - Cuba (1995)

Names of Persons - Czech Republic (2016)

Names of Persons - Denmark (2016)

Names of Persons - Estonia (2016)

Names of Persons - Finland (2016)

Names of Persons - France (2009)

Names of Persons - Georgia (1977)

Names of Persons - Germany (2016)

Names of Persons - Greece (2020)

Names of Persons - Hungary (2016)



IFLA Cataloguing Section

Names of Persons - Chinese Names

Language in English: Chinese

Language name in official language(s)

Last updated: August 2020

Chinese Names in Mainland China

Modern Chinese names consist of a sur a given name, which is nearly alwa patrilineal, passed from father to ch surnames upon marriage, except in pl Kong.

Although there are currently over 6,000 expression for the Chinese people i Surnames” still makes up about 85% of Liu (刘) and Chen (陈) are the top five words long. Among them, three charact account for 14.0%, four character nar account for 1.0%¹. Most commonly character; however, about twenty doub include Sima (司马), Zhuge (诸葛 O’Young, suggesting an Irish origin to are family names with three or more ch For example, Aixinjueluo (爱新觉罗, Aisin Gioro), was the family name of th



Chinese Names in the Hong Kong Special Administrative Region

This entry covers Chinese usage in Hong Kong where **Cantonese** dia Romanization of this dialect differs from Putonghua (普通話), also kn 語) which is spoken in Mainland China. Whilst Romanized names are there is a general practice to include, in one position or another, the n script as is done in the catalogues of many libraries in Hong Kong fo written in Chinese. It is recommended that the names of personal Romanized in the form preferred by the author as is usually indicated title page of his or her works in a Western language. In cases of forms appearing in different works, reference sources should be con: the best known form. When a Cantonese Romanization is used, refere from the standard Pinyin Romanization, as well as any other varia sought. In case the Romanized form of an author’s name is not availa Romanize the name in Pinyin.

NAME ELEMENTS

Elements normally forming part of a name

Element	Type	Names in Chinese	Ro
1. Family name	Simple, usually one Chinese character	陳 黎 林 黃	Ch La Lam Wong
	Compound, usually two	歐陽	Au-Yeung



Chinese Names in the Macao Special Administrative Region

This entry covers Chinese usage in Macao, where the **Cantonese** dialect is spoken. The Romanization of this dialect in Macao for names differs from the Mandarin (Romanized and pronounced by following Hanyu Pinyin) or the Cantonese in Hong Kong. In accordance with Macao local law Article 2 of DL No. 88/85/M dated 26 September 1985, the use of Romanization in official documents in Macao shall follow the *The Syllabary for Coding and Cantonese Romanization*. Please refer to https://bo.io.gov.mo/bo/i/85/40/declei88_cn.asp#88 for details and the Syllabary. Some exceptions could be found, such as the Romanization “Wong” for the family name 黃 or 王 in the Syllabary is actually used as “Vong” instead in most of the cases for people born in Macao.

Meanwhile, it is also recommended that the name of a person should be Romanized in the form preferred by the relevant person, as indicated in his/her predominant works published in the Western language. In some cases, Chinese names in Macao are Romanized by following the Wade-Giles Romanization or Hanyu Pinyin. Other variants may also be found in Macao.

Native-born Portuguese people (so called “Macanese”) or people mixed Chinese and Portuguese in Macao usually has official names in both Chinese and Portuguese. For example: *Henrique de Senna Fernandes* (also named as 飛歷奇 in Chinese), *Raimundo Arrais do Rosário* (named also as 羅立文).

NAME ELEMENTS

Elements normally forming part of a name

Element	Type	Examples
1. Family name	Simple, usually one character	姚 李 梁 潘 王
		Iu Lei Leong Pun Vong



Names of Persons

Languagues files:

[Names of Persons - Arabic names \(2018\)](#)

[Names of Persons - Hebrew names \(2018\)](#)

[Names of Persons - Chinese names \(2020\)](#)

Countries files:

[Names of Persons - Albania \(2016\)](#)

[Names of Persons - Argentina \(2010\)](#)

[Names of Persons - Armenia \(1977\)](#)

[Names of Persons - Australia \(2015\)](#)

[Names of Persons - Azerbaijan \(1977\)](#)

[Names of Persons - Belarus \(1997\)](#)

[Names of Persons - Belgium \(1995\)](#)

[Names of Persons - Bosnia and Hercegovina \(1996\)](#)

[Names of Persons - Brazil \(2016\)](#)

[Names of Persons - Bulgaria \(2016\)](#)

[Names of Persons - Canada \(1994\)](#)

[Names of Persons - Chile \(2016\)](#)

[Names of Persons - Croatia \(2010\)](#)

[Names of Persons - Cuba \(1995\)](#)

[Names of Persons - Czech Republic \(2016\)](#)

[Names of Persons - Denmark \(2016\)](#)

[Names of Persons - Estonia \(2016\)](#)

[Names of Persons - Finland \(2016\)](#)

[Names of Persons - France \(2009\)](#)

[Names of Persons - Georgia \(1977\)](#)

[Names of Persons - Germany \(2016\)](#)

[Names of Persons - Kazakhstan \(1977\)](#)

[Names of Persons - Kirgiziya \(1977\)](#)

[Names of Persons - Iceland \(2010\)](#)

[Names of Persons - Ireland \(1996\)](#)

[Names of Persons - Italy \(2017\)](#)

[Names of Persons - India \(1996\)](#)

[Names of Persons - Indonesia \(2010\)](#)

[Names of Persons - Japan \(2016\)](#)

[Names of Persons - Latvia \(2016\)](#)

[Names of Persons - Lithuania \(2017\)](#)

[Names of Persons - Mexico \(2010\)](#)

[Names of Persons - Moldova \(1977\)](#)

[Names of Persons - Netherlands \(2016\)](#)

[Names of Persons - New Zealand \(2009\)](#)

[Names of Persons - Nigeria \(1995\)](#)

[Names of Persons - Norway \(2016\)](#)

[Names of Persons - Peru \(2010\)](#)

[Names of Persons - Portugal \(2009\)](#)

[Names of Persons - Romania \(2016\)](#)

[Names of Persons - Russian Federation \(2016\)](#)

[Names of Persons - Scotland \(2016\)](#)

[Names of Persons - Serbia \(1994\)](#)

Consider to update the file for Kazakhstan?



Emerging Metadata Standards and Guidelines



Current Action Plan of CATS Section

The current action plan covers the span 2019-2021, with 4 focus areas:

1. Maintaining consistency between standards (Structural revision of ICP)
2. Identify key-competences for metadata librarians
3. Promoting section's key-documents in a international scale
4. A focus on authority control and ID management

Action Plan: <https://www.ifla.org/cataloguing/action-plan> (chaired by Vincent Boulet)

Recent Virtual Event:

New horizons: emerging metadata standards and practices in the 21st century

https://www.youtube.com/channel/UCUrrt_nxhc4rYIDYfkO93-Q

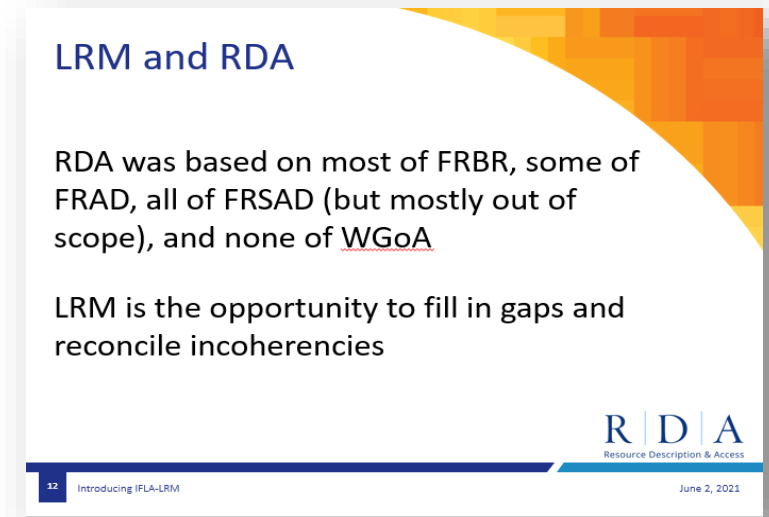
Sponsored by the IFLA Bibliography, Cataloguing, and Subject Analysis & Access Sections.



Emerging Metadata Standards and Guidelines

- ✓ Library Reference Model is IFLA's conceptual model/data model;
- ✓ ISBD is IFLA's content standard
- ✓ UNIMARC is IFLA's encoding format

--By Gordon Dunsire, Chair of RDA Steering Committee



LRM and RDA

RDA was based on most of FRBR, some of FRAD, all of FRSAD (but mostly out of scope), and none of WGoA

LRM is the opportunity to fill in gaps and reconcile incoherencies

R | D | A
Resource Description & Access

32 Introducing IFLA-LRM June 2, 2021



IFLA generally uses the term '**standards**' to refer to the following types of documents:

- Conceptual models
- Rules for resource description
- Digital format codes
- Guidelines (documents consisting of instructions, advice and models of preferred practices)
- Best practice (documents consisting of procedures and techniques based on experience and research)

IFLA Standards: <https://www.ifla.org/node/8750>



Library Metadata in a Shared Environment



MALA Hub Project

- ❖ A region-wide academic resource-sharing project initiated in 2019, with the sponsorship of Education and Youth Development Bureau, Macau SAR Government (merged with Higher Education Bureau in 2021)

Benefits:

- ✓ Library resources sharing among members
- ✓ To promote the usage of library resources
(by providing discovery platforms via this projects)
- ✓ To support and enhance teaching, learning and research activities at city level
- ✓ Increase collaborations among members



MALA Hub Project

1 + 7 + N

||

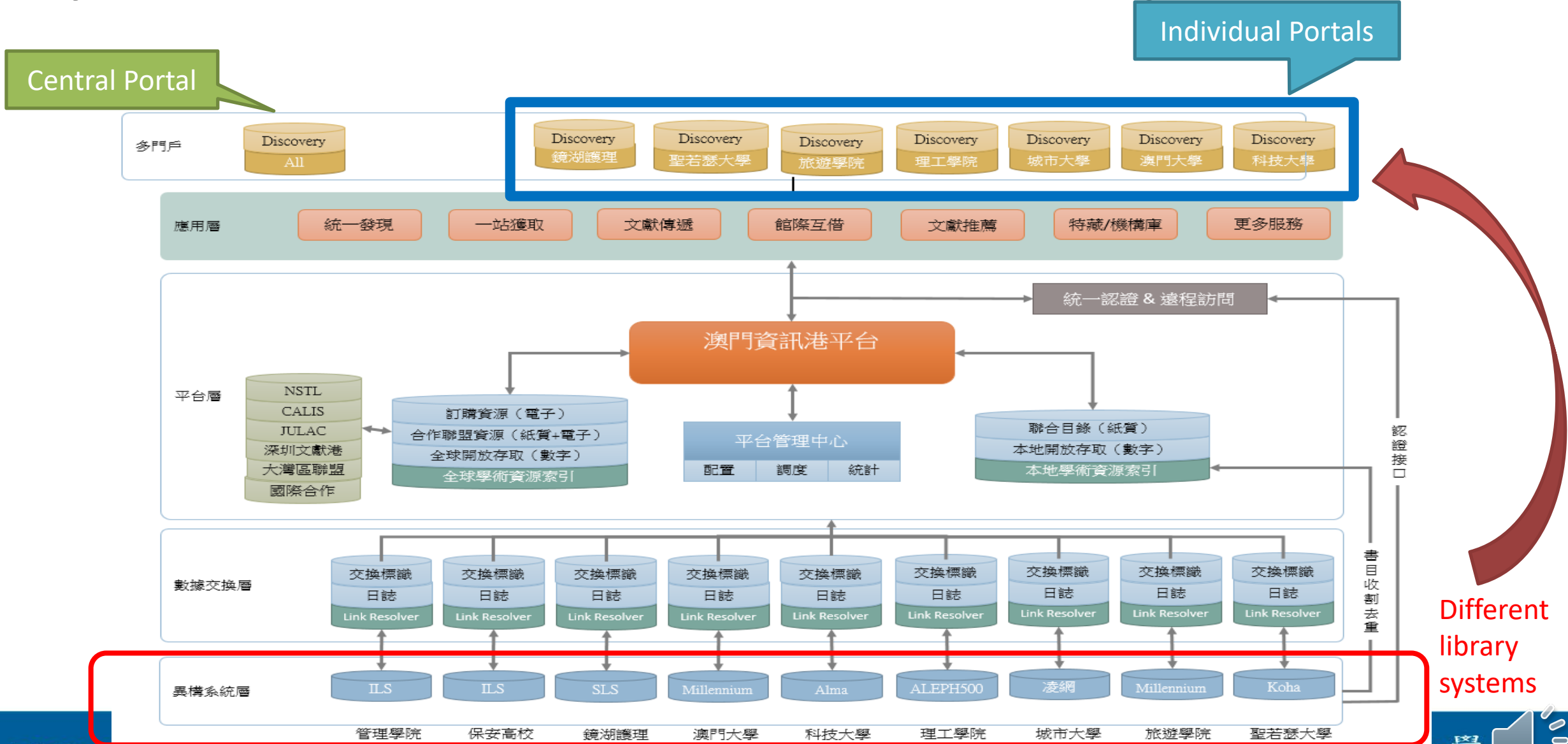
MALA Hub (Central Portal) + **7 Discovery Portals for Individual Institutions** + **Subject Portals**



2 members are small in scale and request for no individual portals



System Framework of MALA Hub Project



MALA Hub as Central Portal

- ❖ Central Portal of the 9 MALA members
- ❖ MALA Hub as a Union Catalog *(completed Jan 2020)*
- MALA Hub as an ILL Platform *(completed Jun 2020)*
- MALA Hub as Subject Portals



澳門文獻港 MALA Hub (Union Catalog + ILL Platform)

澳門大學 UNIVERSIDADE DE MACAU UNIVERSITY OF MACAU 伍宜孫圖書館 Wu Yee Sun Library

New Search Journal Search Interlibrary Loan Service **MALA HUB** Collections

Over 200,000 PNX records

澳門文獻港 MALA HUB

Active filters

- City University of Macau X
- Remember all filters
- Reset filters

Tweak my results

- Expand My Results

Sort by Relevance

Availability

- Full Text Online (3,506)
- Physical Items (4,121)

Resource Type

- Journals (20)
- Web Sites (7)



BOOK
... Annual report of Education and Youth Affairs Bureau ...
Macau : Education and Youth Affairs Bureau , 2010-
[Check holdings >](#)

- TOP
- SEND TO
- GET IT
- DETAILS
- LINKS
- MORE

Send to

EXPORT RIS REFWORKS ENDNOTE CITATION PERMALINK PRINT E-MAIL

Get It
MY INSTITUTION:

MALA Hub provides one stop search from the nine academic libraries in Macau for all of their academic resources, as well as for raising book loans and article requests.

OTHER INSTITUTIONS

City University of Macau	Has holdings	[icon]
Macao Polytechnic Institute	May be available , Reference Collection ; (L573.35 .M333 2018)	[icon]

Location	Call No.	Status
Library - Reference Collection	L573.35 .M333 2018	available

PLEASE SIGN IN TO REQUEST IT.



MALA Hub – Portuguese Portal

Derived from the Hub, several topic-specific resource portals are suggested by the Government and the community.

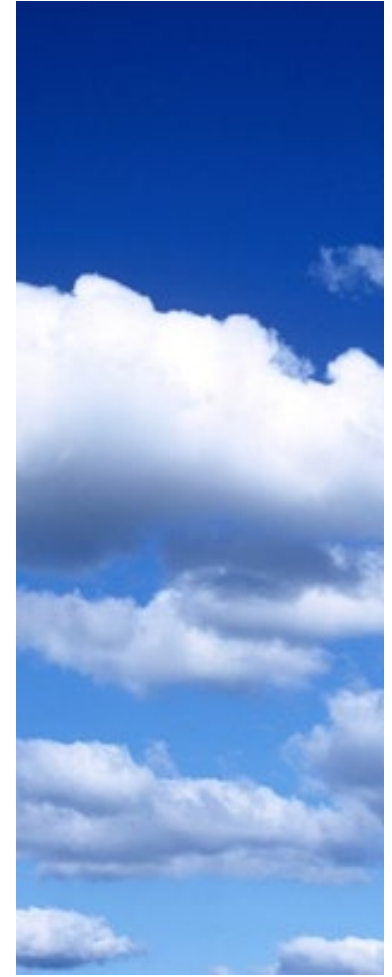
The first topic-specific portal, Portuguese Portal, launched at the end of 2019.

The screenshot shows the MALA HUB Portuguese Portal interface. At the top left, the logo reads "澳門文獻港 | 葡語資源平台" and "MALA HUB | Portuguese Portal". To the right of the logo are two buttons: "NEW SEARCH" and "MALA HUB". Further right are icons for a refresh button, a pushpin, and a "Menu" dropdown. Below the logo is a large blue search bar with the placeholder text "Search anything". To the right of the search bar are icons for a microphone and a magnifying glass, and the text "ADVANCED SEARCH". Below the search bar are two dropdown menus: "All items" and "Anywhere in the record". Below the search bar is a white box with the heading "Welcome to MALA HUB - Portuguese Portal" and the text "It provides a simple, one-stop searching from nine Macau academic libraries for books, e-resources, videos, articles, and more, in Portuguese language." In the bottom right corner, there is a speaker icon and a volume control slider.

UNESCO and Sustainable Development Goals



Future Challenges



Future Challenges



Impact of emerging technologies on library metadata creation and management, data analytics, indexing and discovery, and so forth.



Changing roles of metadata librarians -- Identity Management, Research Information System, Open Data, etc.



Integrating across various sectors, such as archives, museums, cultural/memory projects, digital humanities projects, etc.



Do Curriculum designs and development of the library information schools meet the potential needs of libraries and users' growing expectations?



Continuing education and professional skill development for staff
– get ready to LEARN and CHANGE



WILEY



SPRINGER NATURE



Eurasian Academic Libraries Conference – 2021
“Contemporary Trends in Information Organization in the Academic Library Environment”

June 29-30, 2021

THANK YOU FOR LISTENING!

Contact information:

Priscilla Pun

Head of Technical Process, University of Macau

CATS Corresponding Member, IFLA

E-mail: nipun@um.edu.mo

