

## **PCC Task Group to Support Expansion of PCC Cataloging in Sinopia Final Report to the PCC Policy Committee (PoCo)**

### **Introduction**

The PCC Task Group to Support Expansion of PCC Cataloging in Sinopia was formed by the PCC Policy Committee (PoCo) in June 2020. In addition to a survey and summary of results shared in the preliminary report to the PCC, the Task Group has been charged to “formulate a plan to expand PCC cataloging in the Sinopia cataloging tool. This plan should include **recommendations** for supporting PCC members (institutions or individuals) who wish to use Sinopia both for experimentation and exploring cataloging in a linked data environment.” In the following report, the Task Group will present its recommendations. The recommendations will be grouped under the five directives of the charge, as indicated below.

### **Consider a mentorship program where LD4P2 Cohort members provide guidance to those new to Sinopia and linked data**

The Task Group proposes that the formation of a mentorship program follow one of three models.

- A. The first model would be an informal pairing in which libraries or individuals available to provide guidance can list their contact information. This information could be shared on the PCC Sinopia Catalogers Wiki page (to be explained below).
- B. The second model would seek individuals to volunteer to mentor on specific topics and would provide insight and guidance for all new Sinopia users with an interest in that topic.
- C. A third model would be a more formal pairing. We suggest that new PCC Sinopia users complete a survey indicating their areas of interest and availability. The survey could help inform which new users would be best matched with more established cohort members. This survey could also be used to explore training needs, expanded upon below. The Task Group points to the ALCTS mentorship program that used this third model and proved to be successful (<https://alcts.libguides.com/mentoring>).

### **Offer ideas for creating learning opportunities and communication channels for PCC members using Sinopia**

The Task Group recommends the formation of a Sinopia Catalogers Wiki and a PCC Sinopia Catalogers Affinity Group (outlined below), but suggests that all announcements and communication also be shared via the pre-existing PCC listserv (i.e., PCCLIST). Although the PCC, rather than the LD4 community, would oversee these efforts, the Task Group also recommends that communications be sent to appropriate LD4 community channels (e.g., the sinopia-users Google group, the LD4 Sinopia User Group Slack channel, etc.). Coordinated use

of these platforms would provide PCC members the opportunity to pose questions, gain feedback, and participate jointly in their use of Sinopia.

A PCC Sinopia Catalogers Wiki would provide a main place for PCC members to find training, Affinity Group meeting notes, future training, FAQs, a list of PCC-approved profiles available in Sinopia, and any other resources needed for new Sinopia users. The formation of a Wiki would be maintained and updated by the PCC, but may contain links to websites for the LD4 Affinity Groups that may be of potential interest to PCC members. The LD4 Wikidata Affinity Group (<https://wiki.lyrasis.org/display/LD4P2/LD4-Wikidata+Affinity+Group>), the ISNI PCC Pilot (<https://wiki.lyrasis.org/display/PCCISNI/PCC+ISNI+Pilot+Home>), and the current Wikidata Pilot (<https://wiki.lyrasis.org/display/pccidmgt/Wikidata+Pilot+Kick-off+meetings>) provide good examples of sample Wiki pages.

In addition to posting announcements, training, and other resources on the PCC Sinopia Catalogers Wiki, the Task Group also recommends that the PCCLIST listserv continue to serve as a place for announcements and communications to all PCC Sinopia users. New attendees who are not already subscribed to it should be added, and a posting for how to join the listserv can be included in the Wiki. In addition, new Sinopia users should be encouraged to join both the recently created Google list ("sinopia-users" that replaced the PCC-TG1 list) and Slack channel for Sinopia users in the LD4 community. Both communication channels would allow PCC members to ask questions about cataloging in Sinopia and learn from other more experienced users. The Task Group also recommends that leaders of the PCC Sinopia Catalogers Affinity Group monitor issues and questions that arise on these communication channels, which can inform this group's agenda. The Task Group suggests that information about these LD4 channels, as well as links to them, be provided on the PCC Sinopia Catalogers Wiki. Additionally, questions posed most frequently on the LD4 Slack channel and Google list may be added to the FAQ portion of the PCC Sinopia Catalogers Wiki.

The Task Group recommends that the PCC use the Wiki, Affinity Group, and listservs to provide new members access to conferences and similar events that PCC members most frequently attend. New members would be encouraged to participate, in hopes of alleviating any concern that new users would be intimidated to share their work. Any presentations relating to PCC and Sinopia or LD4 could be shared on the Wiki as well as any postings for professional development opportunities.

**Work with the PCC Standing Committee on Training's existing Sinopia Training Task Group to identify additional training that needs development, including training in additional formats such as video or self-paced exercises**

In addition to the current training modules being developed by the PCC Standing Committee on Training's Sinopia Training Task Group, the Task Group recommends that access to those modules and any future modules be made available in video format as well as slide/PDF format. It is recommended that videos and slides contain real-life cataloging examples and demonstrate

the steps that someone would go through when cataloging within Sinopia. These modules can be housed on the PCC Sinopia Users Wiki.

The Task Group also proposes that the new Affinity Group (outlined below) begin its first meetings with an opportunity for new users to review these training modules and discuss them together. Later Affinity Group meetings can be focused on specific user questions or provide a more in-depth look at specific topics. Former LD4P cohort members with specific areas of expertise (e.g., serial cataloging, profiles, etc.) can be invited to present to the Affinity group. The survey for new Sinopia users suggested by the Task Group as well as any questions that come out of discussions in the Affinity Group can be used to inform future training needs. A survey could also be circulated to new users asking for feedback following initial training.

The Task Group also recommends revisiting some of the survey results from its preliminary report. In the survey circulated to LD4P2 cohort members, numerous responses identified areas where best practices would be helpful. These responses can be found in the Appendix to this report and can be used, along with any feedback from new users, to inform future training or potential best practices that could be shared in the PCC Sinopia Catalogers Wiki. It was noted by the chair of the Sinopia Training Task Group that many of these topics would require the development of community standards and best practices before training materials can be created. In the meantime, the Task Group feels that the proposed PCC Affinity Group can help identify gaps in both best practices and training, and communicate these needs on an ongoing basis to the Sinopia Training Group and other appropriate bodies within the PCC that could address them.

Finally, some suggestions for topics that could receive higher priority for the development of best practices, followed by the creation of training materials, were made by the chair of the Sinopia Training Task Group: “community standards for sharing data, nested and unnested profiles, cataloguing rules as interpreted for Sinopia, how to format data, and cataloguing punctuation.” The Task Group also sought feedback from the co-chairs of the Linked Data Advisory Committee on whether any specific topics should be focused on within the context of PCC priorities. We received the following response: “It seems that the focus of prioritization should be on answering the question of how to cooperate effectively in a linked data cataloging environment. How metadata is stored or recorded internally in Sinopia may be less important than how it gets mapped to a uniform exchange format—a data shape that would allow information to be shared, queried, and validated in a consistent way (e.g., linked data equivalents to the BSR and CSR, with BIBFRAME as the core exchange format).”

### **Offer ways to gather and prioritize input of PCC Sinopia catalogers and communicate it to Sinopia developers for the LD4P3 timeline (2020-2022)**

The Task Group recommends that feedback regarding the use of Sinopia be gathered during Affinity Group meetings. One Affinity Group meeting can be designated for Sinopia development questions and Sinopia developers can be invited to attend and field questions.

Alternately, members of the PCC Sinopia Catalogers Affinity Group can present to the LD4 Sinopia User Group, providing feedback and initial thoughts on Sinopia usability and tools.

For other questions or concerns about Sinopia, a feedback form can be offered on the Sinopia Catalogers Wiki and responses from this form can be shared with the LD4P3 partners. New users should also be made aware of the existing link to report problems available in Sinopia. However, it should be noted that feedback submitted through the latter mechanism must be self-identified as coming from a participant in the PCC expansion in order to be “prioritized” as such. According to the coordinator of the LD4 Sinopia User Group, such feedback would receive higher priority if it benefits the entire PCC community, as opposed to just the individual making the request. The Task Group also suggests that the PCC coordinate with LD4 and Sinopia developers to insert at least one link in the Sinopia “Help and Resources” pointing to PCC resources for new users. This would help to create the link between the PCC members, PCC best practices, and Sinopia.

The Task Group also recommends that new users be included in future usability interviews conducted by Astrid Usong. This would provide individuals the opportunity to walk through specific problems and “pain points” within Sinopia and propose suggestions and changes.

### **Explore the possibility of creating an LD4 PCC affinity group**

As mentioned in other aspects of the Task Group recommendations, the formation of a PCC Sinopia Catalogers Affinity Group would be a valuable tool for both pre-existing and new Sinopia users to learn and share about Sinopia. In the survey conducted by the Task Group, affinity groups were consistently identified as a valuable resource (Question 28: What did you find most useful about the cohort?).

The Task Group recommends that the proposed Affinity Group have the following goals:

- Provide a welcoming, collaborative, and supportive space to discuss topics related to Sinopia, with a focus on cataloging issues.
- Gain a basic understanding of how to catalog in Sinopia in the context of the PCC community and its norms.
- Discuss and document training needs of new users of Sinopia. Survey members of this group at the beginning and later, at periodic intervals to gauge such needs, as well as monitor topics posted on the LD4 Sinopia User Google Group and Slack channel. Maintain communication with the Sinopia Training Task Group and PoCo about these training needs.
- Introduce new users of Sinopia to communication channels and resources to help them learn how to use Sinopia. Facilitate connections with the LD4 community that may lead to mentoring and networking opportunities.
- Invite and encourage experts from the LD4 community to participate in the group to provide training on specialized topics (e.g., cataloging of serials or special formats in Sinopia, etc.).
- Gather feedback from new Sinopia users on Sinopia and facilitate the sharing of such feedback to the LD4P3 partners.

- Gather feedback from new Sinopia users on PCC-approved profiles and best practices as they are developed and share such feedback with the groups that will be responsible for managing and maintaining them.

The proposed PCC Sinopia Catalogers Affinity Group would function in a similar manner as the LD4 Affinity Groups. There would be no formal “membership” but PCC members could join individual meetings that are announced through the PCCLIST and other appropriate communication channels, as well as access publicly available materials (including training materials, meeting notes, etc.) on the PCC Sinopia Catalogers Wiki.

The Task Group recommends that the proposed affinity group be overseen by the PCC, but seek ways to collaborate with and draw upon expertise within the LD4 community. It would also differ from the existing LD4 Sinopia User Group by providing support for training and facilitating discussions for learning about specific profiles, methodologies, and strategies for record creation and sharing. The PCC Sinopia Catalogers Affinity Group could collect feedback on Sinopia to present to the LD4 Sinopia User Group and the LD4P3 developers, but its primary purpose is to help users learn best practices for cataloging in Sinopia. In contrast, the LD4 Sinopia User Group is more focused on Sinopia development and promotion and description of new Sinopia features.

Initially, the proposed Affinity Group could be used to review training modules developed by the PCC Sinopia Training Task Group and respond to questions regarding the beginning stages of using Sinopia. Over time, the Task Group suggests that meetings can be focused on specific topics or issues. These topics can be gleaned from frequently asked questions by new members or by former LD4P cohort members who would like to volunteer to share their knowledge. The Task Group points to the LD4 Wikidata Affinity Group as a successful example of how the proposed PCC Sinopia Catalogers Affinity Group can be used to promote training and tools (<https://wiki.lyrasis.org/display/LD4P2/LD4-Wikidata+Affinity+Group>).

In addition to regularly scheduled Affinity Group meetings, the Task Group suggests that the proposed Affinity Group could also coordinate regular “co-working” times when members can work on their own projects but would have the ability to be actively in touch with those working in Sinopia at the same time. The Task Group identifies the Wikidata Working Hour as an example. The Wikidata Affinity Group routinely promotes working hours for members to attend and work on projects in real time with feedback from others. Especially as those new to Sinopia and BIBFRAME begin record creation, open collaborative working hours could be beneficial.

While the target audience for this Affinity Group will be PCC members, the Task Group recommends opening the Affinity Group to non-PCC members as well. However, the focus during the initial launch of this Affinity Group would be on PCC members, at least for the initial phase of the PCC expansion of Sinopia.

The Task Group recommends that meetings of the proposed Affinity Group be regularly announced on the PCCLIST listserv, as well as notes shared after meetings. The initial announcement to participate in the PCC Sinopia Catalogers Affinity Group can be sent to this list, as well as cataloging or technical services directors at PCC member libraries to forward to catalogers who are not subscribed to this list. The Task Group also recommends that the initial announcement should include a link to the PCC Sinopia Catalogers Wiki, as well as a link to a survey that could pose questions such as what types of materials they plan to work with, the number/type of staff involved, time commitments, and specific areas of interest. The survey could gauge the potential needs of PCC members and provide insights into future training and mentoring needs. The survey could also help guide the agenda of the PCC Sinopia Catalogers Affinity Group and to inform the aforementioned mentorship program.

In addition to sending the invitation and survey to the PCCLIST listserv, the Task Group suggests that the PCC examine new accounts in Sinopia that have been created outside of the LD4P2 cohort for potential new Sinopia users. The list of accounts can be reconciled to discover those that are PCC members and they can be invited to participate in the PCC Sinopia Catalogers Affinity Group.

## **Conclusion**

The suggestions put forth by the PCC Task Group to Support Expansion of PCC Cataloging in Sinopia require communication and collaboration between the proposed new platforms (the Wiki, Affinity Group) and other PCC-related committees and groups. The new platforms will work in tandem with other PCC committees to facilitate training, the maintenance of PCC Sinopia profiles, and feedback for the improvement of Sinopia along with other tasks. These platforms will also need to coordinate with the LD4 community and its communication channels, as the latter will provide support for Sinopia feedback and affinity groups.

The Task Group's recommendations should help expand Sinopia use among those interested in experimenting with linked data by supporting a network of like-minded institutions and providing opportunities for training, questions, and collaboration.

## **Task Group Members:**

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- Theo Gerontakos (University of Washington)
- Jeannette Ho (Texas A&M University), co-chair
- Audrey Pearson (Yale University)
- Isabel Quintana (Harvard University), PCC Policy Committee liaison)
- Jacquie Samples (Duke University)
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## Appendix

Areas in need of best practice according to responses to the PCC Task Group to Support Expansion of PCC Cataloging in Sinopia survey:

**Question 26: Are there areas in your workflow that would benefit from best practices and/or training (e.g., interpretation of cataloging rules in a linked data environment, etc.)? Please list and describe any that you feel would be important for the PCC to investigate.**

Cohort #1	BIBFRAME training, mapping from MARC to BIBFRAME.
Cohort #2	Clarifying the relationship between Work, Instance, Item, and Admin Metadata, and what information is inherited between the different levels. The mechanics of linkages when using un-nested templates. How is this manifested when the data is exported?
Cohort #3	We created our own training that I felt was effective. It would be helpful to have the PCC adapt this training and make it freely available
Cohort #4	What does good BIBFRAME data look like from a platform agnostic view. PCC is already looking into this I think.
Cohort #5	All aspects from creating profiles, where to start, nested/un-nested, agreed upon best practices for descriptions
Cohort #6	Resources looking at interpretation of cataloging rules in a linked data environment is a good idea. Cataloging rules created for a linked-data environment is an even better one!
Cohort #7	A conversation has already started among cohort members regarding properties in the Admin Metadata template related to metadata quality and level of completeness. The current profiles still use coding that relates to the MARC environment, and it would be necessary to give some thought to what they mean in a BIBFRAME environment.  Also, as more and more users are joining, it would be fundamental to have some common Sinopia “rules of engagement” or community guidelines for editing and linking. PCC has the experience gained through their different collaborative programs, but I wonder if the same rules will apply to a linked data collaborative environment or new ones need to be defined.
Cohort #8	We ran into confusion about how to implement RDA in Sinopia for “expression” level metadata. We found it very challenging and confusing about how to catalog translations and record expression-level authorized access points in a Sinopia

	<p>record. We ended up treating LRM-level “expressions” as Sinopia “works.” There is not a one-to-one correspondence between terminology in BIBFRAME and RDA. We couldn’t find any documentation on superworks so we lacked guidance on what it means within Share-VDE (we are not members of it at this time) and what properties should be in a template at that level to avoid redundancy. Another area where we could use some best practices and training concerns how to catalog anthologies in Sinopia. Do we catalog at the “collection level” using nested template or catalog the “analytics” within the anthology using un-nested templates?</p> <p>Moreover, we were uncertain how to handle series in Sinopia. There is a place for transcribing series statements but none for controlled series headings, unless we created a "series" work record in Sinopia to link to as a "related work," but we already contribute series authority headings to NACO, so this would be redundant and make our work less efficient. Also we had trouble getting Sinopia to relate the numbering to the correct series statements when there was more than one. Finally, we will eventually need training on how to implement the NEW 3R RDA Toolkit in Sinopia that will be published in December.</p>
Cohort #9	No response
Cohort #10	Best practices for consistently formatting data; what fields to use or not use; whether to record certain data as Work or Instance; how to handle non-roman scripts
Cohort #11	Definitely "interpretation of cataloging rules in a linked data environment." It's also important that decisions around profile modeling be standardized (e.g., implementation of a "pure" RDA model versus a BIBFRAME model; use of nested versus unnested profiles) and that a standard set of profiles be maintained. Detailed training modules that encompass the whole scope of "linked data cataloging" are also a necessity.
Cohort #12	<ol style="list-style-type: none"> <li>1. We would need guidelines/standards regarding which properties to use with specific kinds of bibliographic data, something akin to the way the BSR &amp; CSR indicates in which MARC fields required data is entered. It would be helpful to have best practices for structuring BF data.</li> <li>2. How to format dates?</li> <li>3. How to do series correctly</li> <li>4. Copying vs linking to work or instance records when copy cataloging</li> </ol>
Cohort #13	Would be useful to have PCC_level discussion of individual elements of BIBFRAME. For example, the work-level contents note: how does its use in BIBFRAME differ

	from how it is described in ISBD and MARC?
Cohort #14	Training and best practices on the BIBFRAME model, training on the overall ecosystem/data flow.