### 2022-06-08 Product Owner Meetings

#### 08 Jun 2022

**Attendees:** Khalilah Gambrell  Charlotte Whitt Magda Zacharska
Ann-Marie Breaux Brooks Travis Stephanie Buck Owen Stephens Dennis Bridges Erin Nettifee
Julie Bickle Mikhail Fokanov Patty Wanninger Peter Murray Tiewei Liu

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| Announcements | 10 minutes | All | • Lotus HF #1 postponed - June 9th  
• Please start adding your Morning Glory Release Notes - Morning Glory (R2 2022) Release Notes  
• Please clean up your Morning Glory FOLIO features statuses  
Suggestion: New PO role as Assistant PO? Could be a way to engage more SMEs. Laura Daniels is willing to pilot this idea. |
| Delete an instance record requirements discussion UXPROD-1624 | 45 minutes | Charlotte Whitt | **Goal** - Start development in Nolana release. To do so must define requirements and ensure all applicable teams have capacity.  
• Charlotte Whitt will present requirements and use cases  
Planning of development work which involves Inventory and dependent apps:  
  a. Complete list of use cases for Deletion of instances  
  b. Deletion of instances - dependency check |

Chat from Zoom meeting: (see especially the convo about deleting Instances after the PO recruitment topic)

From Erin Nettifee to Everyone 11:02 AM  
**2022-06-08 Product Owner Meetings**

From Julie Bickle to Everyone 11:07 AM  
+1 Charlotte

From Khalilah to Everyone 11:08 AM  
Maybe we can pilot it

From Owen Stephens to Everyone 11:10 AM  
I wonder if “assistant PO” is the right term here. Would it be easier to persuade people and be clear on the difference if we had a different name for this role?

From Steph Buck to Everyone 11:11 AM  
Support PO?

From Owen Stephens to Everyone 11:11 AM  
It's the "PO" bit that worries me

From Charlotte Whitt to Everyone 11:11 AM  
Assistant PO is Laura’s suggestion :-)

From Erin Nettifee to Everyone 11:12 AM  
The eternal pushback on this is whether five hours a week is really worth it or whatever time commitment is involved

From Owen Stephens to Everyone 11:12 AM  
I worry that it might put off those who already think “I couldn’t be a PO” and also could be confusing about boundaries between the roles

From Steph Buck to Everyone 11:12 AM  
Are there a few POs who would want to attempt to draft some of these descriptions?

From Patty Wanninger to Everyone 11:14 AM  
would be in a group that tried to write job descriptions

From Brooks Travis to Everyone 11:14 AM  
I think there was some confusion around the language in the new MOUs. It’s encouraging half-time, but not requiring it, was my understanding.

From Julie Bickle to Everyone 11:15 AM  
I think the Goal we want here is: Present Options at the wolfcon. Do we want to put in ideas/suggestions/etc. somewhere? I.e. Slack or somewhere? I'm happy to get the ball rolling.
From Erin Nettifee to Everyone 11:15 AM
Right, but half-time is what you have to do in order for it to "count" in terms of membership contribution

From Brooks Travis to Everyone 11:15 AM
That's an institutional commitment, not per-individual, was my understanding…

Here is where the delete Instance conversation starts

From Brooks Travis to Everyone 11:30 AM
Have we identified the "side effects" in the dependent apps of simply deleting the instance record for the use cases? And are we taking into account the cross-app data sync group's planned recommendation (or lack thereof)?

From Owen Stephens to Everyone 11:38 AM
I don't think that can be an institutional decision

From Erin Nettifee to Everyone 11:41 AM
well if we're talking about Orchid it's at least next April before they get the feature
Or April/May, whatever release it comes out in

From Brooks Travis to Everyone 11:44 AM
It's just a hard-coded list of dependencies

From Owen Stephens to Everyone 11:44 AM
If this was a soft delete with some contingency for references I'd be much more relaxed here

From Ann-Marie Breaux to Everyone 11:45 AM
If I cannot delete an item because of a dependency, does that item record get marked in some way to indicate "if the dependency for this goes away, then delete this item"?

From Brooks Travis to Everyone 11:45 AM
Nope
That's because this is VERY important and getting it wrong is VERY expensive

From Ann-Marie Breaux to Everyone 11:45 AM
It seems like that would be a useful requirement

From Brooks Travis to Everyone 11:45 AM
And it depends on the desired UX

From Dennis Bridges to Everyone 11:46 AM
I believe item deletion is prevented based on status. If an order references an item that is "Available" the item can still be deleted

From Ann-Marie Breaux to Everyone 11:47 AM
An interesting thing to me would be understanding that if an instance/holdings/item is linked to a POL and/or a receiving piece - can it be deleted? Should it be an institutional setting?

From Owen Stephens to Everyone 11:47 AM
I'm not trying to stop something happening here, but I think a soft delete - is a much much safer starting point

From Khalilah to Everyone 11:47 AM
need to leave call. keep the discussion and collaboration flowing.

From Magda Zacharska to Everyone 11:47 AM
I believe starting with the technical approach would give us at least of areas that would be impacted by the deletion - which seems we don't have a clear picture now

From Erin Nettifee to Everyone 11:47 AM
safe travels kg!

From Dennis Bridges to Everyone 11:47 AM
Others have expressed this but the difficult thing is how inventory determines what records are referenced.

From Owen Stephens to Everyone 11:47 AM
There is no referential integrity across Folio apps and this is incredibly problematic for deletion

From Ann-Marie Breaux to Everyone 11:48 AM
To me, we almost have a proof of concept for soft deletes by using "staff suppress"

From Erin Nettifee to Everyone 11:48 AM
Yes, because it'll show up in the LDP

From Owen Stephens to Everyone 11:48 AM
How would they even know

From Erin Nettifee to Everyone 11:48 AM
It'll show up in reporting tools

From Owen Stephens to Everyone 11:48 AM
Good point - but solvable
From Erin Nettifee to Everyone 11:48 AM
performance issues? esp. for shanghai

From Ann-Marie Breaux to Everyone 11:49 AM
But if we basically hide everything that is "staff suppressed" or "soft deleted" - that would take care of LDP, reporting, etc

From Erin Nettifee to Everyone 11:49 AM
Not w/o work, but the reporting piece is solvable, as Owen says

From Owen Stephens to Everyone 11:50 AM
Performance issues can't be worse than currently
And it opens up the possibility of a clean up job that can check dependencies async in the future

From Brooks Travis to Everyone 11:52 AM
The bottom line problem (for me, at least) is that there is no way to produce an exhaustive list of possible dependencies for Inventory, and what the SMEs really want is to just get that record out of sight.

From Owen Stephens to Everyone 11:52 AM
But everything I've said - I have to admit we already allow deletion of agreements and related things (with quite a bit of checking like items + circ)

From Ann-Marie Breaux to Everyone 11:52 AM
Yes, we have a rollback feature for DI - just hasn't been started yet

From Owen Stephens to Everyone 11:54 AM
So I'm arguing for a better approach in the future and I can understand Inventory doesn't want to get delayed by a "better future" solution
But if I was doing the deletion in Agreements today, I'd go with a soft delete + cleanup I think
The cleanup being the mechanism of an eventual hard delete

From Ann-Marie Breaux to Everyone 11:54 AM
I think convos with SMEs would be good too - the more I think about it, the more I think the starting point for deletion of instances would be in Inventory, or via a list of identifiers for Bulk Edit - maybe not really starting from Data Import.

From Brooks Travis to Everyone 11:54 AM
A soft delete/mark-for-delete capability, with concomitant work to get them out of inventory results, is a good start.

From Ann-Marie Breaux to Everyone 11:55 AM
Yes - I do wonder about things like circ history/acq history - how do they factor into deletion of not just instances, but also holdings and items
+1 Brooks

From Owen Stephens to Everyone 11:56 AM
The challenge with Inventory is that it is so central to the running of the library - it's much more likely that things will reference items/instances/holdings than other things

From Brooks Travis to Everyone 11:57 AM
I'd say Users is the only record class that is referenced more widely.

From Steph Buck to Everyone 12:00 PM
Will the nolana decisions be noted in the meeting notes?

From Patty Wanninger to Everyone 12:00 PM
Have to drop. fascinating conversation!

From Brooks Travis to Everyone 12:01 PM
Fixing the way that staff suppress influences inventory search results would be a huge win for the SMEs, I think, even if they haven't articulated it

From Ann-Marie Breaux to Everyone 12:01 PM
For Staff Suppress - if they are to be dropped out of OAI-PMH, we may need to review for Data Import too - and have it fed back to the SRS record like the Suppress from Discovery flag is handled

From Brooks Travis to Everyone 12:02 PM
+1 AM
mod-cleanup

From Steph Buck to Everyone 12:03 PM
Thank AMB
I have to run. Thank you!

From Owen Stephens to Everyone 12:03 PM
Thanks all