PyPI Organization Account Project Meeting Minutes

Onboarding
1 April, 2022
Attendees- Chris, Matt, Ee, Shamika

Onboarding document-
https://docs.google.com/document/d/1SVHCzmLVjAZvrbIcyFNyQdanNLtLYmItYM6co47dA0Y/edit?usp=sharing

Project Meeting
5 April, 2022
Attendees- Chris, Matt, Ee, Shamika

Minutes written by Chris/Matt

Chris will send mocks of UI and emails for review.

Ee provided an overview of less obvious parts of code base to be aware of:

- Pyramid ACL is used for access control. Warehouse currently uses legacy ACL syntax via a compatibility layer, but we want to use the new ACL syntax for this project and in the future. Best way to get started is reading through the new Pyramid documentation on ACL and the guide on upgrading from legacy ACL. Ee can contact Pyramid developers with any questions.

- For feature flags, we should add AdminFlagValue.DISABLE_ORGANIZATIONS to warehouse/admin/flags.py:L20-L26.

We will be targeting end of next week (Fri 15 Apr 2022) for implementing the first two features:

1. Create an Organization account (#11070)
2. Approve account (#11087)

Project board was shared publicly for community visibility. Matt and Chris will add subtasks for each issue (without creating separate "sub-issues") and link issues to pull requests.

Project Meeting
12 April, 2022
Attendees- Chris, Matt, Ee, Shamika

Minutes-

- Matt has been working on the backend, migration
- Chris has been working on email templates, building views
- Next task will be hooking up the views
- Question- Should we allow organization accounts to be created with the same names as existing usernames? Github and NPM do not allow the same org names and usernames. Ee suggested the two namespaces remain separate. Constraints can be built later on.
- Question- When building the organization model, should we use the same rules for normalized org. name as that for project names. Ee recommended using the same rules used for project slugs. Add a validator on the forms.
- Question- Should events be logged? Ee recommended user events and project events should be logged. Org. events should be logged. Jobs should expire rejected org. accounts after ~30 days.
- Question- For org type choices, what terms to use to describe 'company' accounts? Suggestion- This question will require more thought to decide the final list of choices.
  Question about org. size is a good thing to add to the form.

Actions
- ☑ ~~Ee to share comments on org. type choices~~

Project Meeting
19 April, 2022
Attendees- Chris, Matt, Ee, Shamika

Minutes

- Migrate enums to postgres enums later on if the migration might cause delays
- User id should be the canonical way to refer who did what
- Question- Should the user id event be createdby_id or created_by_id. Suggestion- Keep it consistent with other user id events. Do not include usernames.
- User testing should commence once PRs have been merged.
- Sprint 2 should start by the end of this week.
- 100 % test coverage requirement might delay the sprint.
- Raise pending reviews on Slack and by email. There could be delays due to PyCon.
- Org types will be difficult to change once it is released to the public. Converting existing username into org name will be cumbersome.

Actions

- ☑ ~~Change 'functional testing' column to 'internal testing' on the Project Board~~

Project Meeting
26 April, 2022
Attendees- Chris, Matt, Shamika

Minutes
- There are more sprint 2 issues being coded than originally planned as they have similar views. There might be slight delays getting the PRs ready due to delays from sprint 1.
- Question- Should the billing manager only have billing permissions or should they also have owner permissions? Answer- Billing manager should be able to modify/update billing details. For a small organization, the owner can create another user account for the billing manager even though both roles might be handled by the same person.
- Question- Should the PyPI admins have any other responsibilities besides approving accounts? Answer- As the admin is usually a volunteer, we do not want to add more responsibilities.
- A user can remove themselves from the organization. But the account should always have one owner and if the last owner decides to remove themselves, then it should trigger a message to transfer the projects to another user/organization.
- It was decided that user interviews would be more productive if it combined issues from sprint 1 and 2.

Project Meeting
3 May, 2022
Attendees- Chris, Matt, Shamika

Minutes
- Clarifications regarding whether new issues have been created and they need to be added to the project board.
- There are no blockers with the code. Clarifications regarding member roles will be done during code review.

Project Meeting
10 May, 2022
Attendees- Chris, Matt, Ee, Shamika

Minutes
- Ee has limited availability for the next few days
- Question- Events report when orgs. are created. If an org invite is deleted or expires, should the event be deleted. Answer- Events are immutable. They should not be deleted.
- Reuse of org names should not be allowed. There is an outstanding issue on PyPI regarding soft deletion. Usernames can be reused but this is not ideal. Make the relationship between catalog entry and org id nullable. If there is any constraint regarding org invite deletion or expiry, raise it in the PR.
- Email subject lines are either specific or generic. Is there a preference with either one? Generic events are usually bulk events and should have a generic subject line. Org events are not bulk events and should have specific subject lines except for invitation issues/acceptance/decline.
- Should past emails/UI be brought up to date? Yes but only if it does not take too much time. The scope should not change to updating all past emails/UI.
- Before launch, there should be a drop down that gathers information about company type, size of org and number of users. The company types are enterprise, startups, corporations, non-profit, community.

Actions
- ☐ Shamika to add issue for things to check on before launch
  - ☐ org types, size of company, number of users

Project Meeting
17 May, 2022
Attendees- Chris, Matt, Shamika

Minutes
- Projects are created via twine. Should the org owner be able to create a project on the website? Suggestion- That is a massive piece of work that is out of scope of this project. It does not fit within what we are trying to accomplish with organization accounts. Confirm with Ee.
- The project progress has been good so far. Major issues on the backlog are related to team management. Depending on when the code review takes place, deleting and renaming account issues could be included in user testing.
- A general suggestion was to allot more time (2 weeks) for onboarding.

Project Meeting
24 May, 2022
Attendees- Chris, Matt, Ee, Shamika. Chloe

Minutes

- Ability to create a new project is within scope of the org account project. Currently, the user will have to upload a project to PyPI and then transfer it to the org. There is a functionality in PyPI to release a prohibited project name to a user. This is done by creating an empty project and then releasing it to the user. Use the same functionality for any user to create an empty project with a name and assign user permissions to it.
- https://github.com/pypa/warehouse/blob/main/warehouse/admin/views/prohibited_project_names.py#L138-L198
  Use the code shared above. Implement checking on existence and validity of a project. There will be no association table to store the relationship between org and project. There will be no ACL between org and project. Relationships come from teams and users. Owner can assign permission once a project has been created. Any user within org can create a project. They have an owner role.
- If an owner is removed from org, they still remain the owner of the project.
- https://github.com/pypa/warehouse/blob/51ec8528b60e662584ed33e85038bda85ea2c5d1/warehouse/forklift/legacy.py#L914-L974
  Use the same constraints to ensure if the new project is valid
- npm has a default team of developers. This can be implemented if it comes up during user interviews.

Actions

- ☑ Shamika to add issue for org and project relationship discussion, highlight @EWDurbin to participate.
- ☑ Shamika and Ee to review Sprint 5 design before 31 May

User Testing- Round 1
27 May, 2022
Attendees- Mike Fiedler, Shamika, Ee

Agenda
- Introductions
- Introduce the project
- Set scope for round 1 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
- Post test interview
- Summarise the feedback
- Goodbye

Minutes
- Mike has worked with Python >20 years. Has worked mostly in development and operations and currently works at LeafLink. Mike loves working on OS projects. Mike has used PyPI as a consumer and has been publishing packages for around 7 years. Currently, Mike contributes to Warehouse. Mike signed up for user testing as he has seen the PRs around the org account. Mike was a contributor to the Chef ecosystem where flat namespacing was considered. Namespacing was also seen on npm and Github. Mike is interested in extending corporate namespace to sub namespacing. Mike and team use the PyPI website 1-2 times per week. The team has implemented a package gateway on Amazon which provides a pull through proxy for PyPI where an end user can get private and public PyPI with one config. This eases the load on the CDN.
- Mike was able to log in, create an organisation account, add members to the organisation, assign user roles, remove members, cancel user invitations and accept/reject user invites.
- Suggestion 1: The role descriptions should be displayed better. Possibly break it up into a list similar to sentry access management. One line descriptions would be great. Once the role description is dismissed, it is hard to get it back.
- Suggestion 2: Can't see what role each user has been assigned when the invitation is still pending. Can't change the role back to what it was.
- Suggestion 3: If there are 100s of users, how to filter them?
- Suggestion 4: Role descriptions can be moved to the bottom of the page
- Suggestion 5: Is there an audit log of operations to see who was invited, revoked within the org
- Suggestion 6: When removing a user from the org, a prompt should appear asking 'Are you sure?'

- Suggestion 7: Is it not clear what removing a user entails. Would all associations get lost? Do tokens get revoked? This needs to be described.
- Suggestion 8: The email to the user who has been removed from an organisation should mention the consequences of being removed from an organisation. Mention facts like local development artefacts like keys will no longer be valid.
- Suggestion 9: In the email to the user who has been invited to join the organisation, add the actual link to the organisation. All emails should contain a link to the organisation.
- Suggestion 10: A user cannot leave the organisation if they have created it. Is this correct behaviour?
- Suggestion 11: When declining an org invite, add a box to explain why the invite was declined.
- Suggestion 12: When changing the user role, a Save button appears. This button should move to the side so that the page would not expand. There should also be a cancel button. The dropdown style is different from the one on the top right. There is a visual language disconnect.
- Suggestion 13: Add red tone for required items.
- Suggestion 14: Expose user info in the admin dashboard.
- Suggestion 15: When an organisation account request has been submitted, there is no information about the expected timeline for approval.
- Suggestion 16: There is no way to revoke creating an organisation
- Suggestion 17: The company/community organisation list does not differentiate the two. Add an icon to indicate the type of organisation.
- Suggestion 18: Describe what is within scope of organisation account features. There could be an expectation that namespacing is included. Describe at the top of the create organisation page and add a link to the full description.
- Suggestion 19: The billing manager role should allow billing account email address for each org
- Suggestion 20: When changing the role of a member, once the change has been saved and the page is refreshed a message appears asking for confirmation. The form resubmission should redirect to the direct page and not to the response.
- Suggestion 21: Improve clicking url in emails when using ngrok.
- Question 1: Will there be any namesquatting and how will it be handled? The admin will manually approve all org requests until it makes sense to do so. Then this will be ramped up to allow automated approval when domains match.
- There will be a limit on the number of outstanding org requests per user.
- The general feedback was that the visual styling has to improve. More information about what is possible within an organisation account should be shared so that false expectations are not created.

Project Meeting
31 May, 2022
Attendees- Matt, Ee, Shamika. Chloe
Apologies- Chris

Minutes
- Round 2 user testing will commence once code review for transferring a project and creating a project as both issues need to be resolved to test deleting an org account issue thoroughly
- The suggestions from Round 1 user testing will be collated and shared once it is completed

User Testing- Round 1
27 May, 2022
Attendees- Jürgen Gmach, Bernat Gabor, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 1 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
- Post test interview
- Summarise the feedback
- Goodbye

Minutes
- Bernat and Jürgen maintain the tox project. Currently, upload is restricted to one user whose API token has been shared. If another user wants to upload, the token will have to be shared or it is not possible. If there is an organisation token, anyone within the organisation can upload a project. Users can have access to sub projects. Jürgen's team at Canonical has 20-30 projects on PyPI. When someone joins the organisation, they cannot publish immediately. Organisation accounts will make managing projects and users easy. Bernat uses the PyPI website once a month to generate the API key. Jürgen uses the website once a week as project admin and daily as a user.
- They were able to create an org account, add members, assign user roles, cancel user invitations, accept and reject user invitations successfully.
- Suggestion 1: The link for creating an org account should be available at the bottom of the page. The link in the drop down box is not intuitive. The user should not have to log in to know that they can create an org account.
- Suggestion 2: When creating an organization, the create page should disappear once the request has been submitted. It should be replaced with a message saying that the user should wait for the admin and for how many days.
- Suggestion 3: When a user has been invited to join an organization, add a banner at the top of the page to make it obvious that the user has a pending invitation,
- Question 1: Will there be any requirement to enforce 2FA? This is not decided yet.
- Suggestion 4: Companies will require 2FA to be activated.
- Suggestion 5: For a user without 2FA, make it intuitive to change the status. Show ways to change it.

- Suggestion 6: When removing a member from an org, a confirmation message should appear asking the owner to confirm it.
- Suggestion 7: Remove button should be red
- Suggestion 8: Provide a select option to select all users or subset of users and perform an operation on those users.
- Suggestion 9: When revoking an invitation, a confirmation message is required.
- Suggestion 10: All invitation requests should have an expiry date. A week is ideal.
- Suggestion 11: When a user wants to remove themselves from an org, the option should be 'Leave' rather than 'Remove'
- Suggestion 12: The organization header should be made more prominent with the people in that org displayed as a tree
- Suggestion 13: When rejecting an org invite, a confirmation message should appear. The user should be able to provide a reason for declining the invite and this message should appear in the email to the owner.
- Suggestion 14: The input field's breadth in the create organization page can be increased so that there is no wasted space on the right
- Suggestion 15: When creating an account, the default option should be 'Community'. A tooltip message should describe the company description.
- Suggestion 16: When changing a user role, a banner should show which user and what role was changed.
- Suggestion 17: The description of user roles should be collapsible rather than dismissable. It should be easy to view the description once it has been collapsed. Or use a tooltip that will describe the roles when rolling over the role.
- General feedback- The features are clear and do not require a manual. The UI is usable with minor modifications. The features met expectations.

User Testing- Round 1
3 June, 2022
Attendees- Jakub Kuczys, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 1 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
- Post test interview
- Summarise the feedback
- Goodbye

Minutes
- Jakub manages Red-DiscordBot. The team consists of developers and QA. A subset of developers are in charge of releases in order to minimise security risks. Currently, the pipeline that exists for releases uses a token that has been generated by one user. While release managers have access to the projects they have to use a single token for release. Jakub was interested in testing to see if the features could help the team. Jakub uses the PyPI website to look up dependencies.
- Jakub was able to create an account, add members, assign user roles, remove members, cancel user invitations, accept/reject user invitations.
- The role description is useful. They seem in line with expectations.
- Suggestion 1: There is no confirmation when removing a member. This could lead to members being removed accidentally.
- Suggestion 2: The email received when a member is removed from an org does not contain name of org in quotes
- Suggestion 3: The link to org should be added in email
- General feedback: It is obvious to understand how the features work. The page is easy to navigate. The features do meet expectations. Jakub wanted to know what each role would do and it is good to know there is a hierarchy in the roles available in the org account.

Project Meeting
7 June, 2022
Attendees- Matt, Ee, Shamika
Apologies- Chris

Minutes

- Matt is working on the backend for the team related issues. Once Chris is back, Chris will work on the UX.
- Chris will work on the open PR for creating/transferring a project
- Ee will refactor code that will determine admin flags related to organisations and users. This flag will have the ability to filter users, types of users etc. If they want to, Chris and Matt can review the code.

Actions

- ☑ ~~Shamika will share a list of functional changes that were suggested in the user interviews~~

Project Meeting
14 June, 2022
Attendees- Chris, Ee, Shamika
Apologies- Matt

Minutes
- Backend services for team features are ready to go. Chris is working on the UI for the same features
- How do we want to handle team membership? There are 3 sources of permissions- individual owners/maintainers of projects can configure a project or upload releases, org owners have ownership, members of teams have ownership over projects. Owner/maintainer role makes sense for individual users; the semantics will have to have to change for teams- teams administer a project, teams can upload a project, teams cannot delete a release
- When transferring a project does the previous owner lose ownership? When a project is transferred to an org, it should remove ownerships for all individual users and also prevent invitation to individual owners. Project should have no new direct roles for ownership, can assign maintainer roles. Explicit ownership records need not exist in the DB. Permission level can be downgraded, cannot be upgraded, add notes to a confirmation text box.
- Does it make sense to allow members of an org to be added as collaborators of a project or should it be done only via teams? If this team is assigned access to a project and org gives permissions for some project, Github shows explicit dialogue of what adding a member will allow. Default groups not recommended, direct assignment to a project is not recommended to an individual. For external collabs, add a red badge to indicate that.

Actions
- ☑ Shamika to share an issue to discuss team role- https://github.com/pypa/warehouse/issues/11590

Project Meeting
21 June, 2022
Attendees: Chris, Ee, Shamika
Apologies: Matt

Minutes
- Chris said that there are no blockers with 'Team' issues.
- The 'Team' PRs will be ready by Thursday review
- Issue 11590 contains the discussion around team permission levels
- Round 2 of user testing will commence shortly
- New issues containing screenshots will be created for the feedback received from Round 1 of user testing

Project Meeting
28 June, 2022
Attendees- Chris, Ee, Matt
Apologies- Shamika

Minutes
- Teams PR is open and needs review, see action item 0
- Next is billing! Discussion on Stripe access. Recommendation is for Moonrise to use a fresh Stripe account and use the test env and keys there.
- Discussion on some questions related to billing:
  - Subscription/Product data should be "source of truth"'d in PyPI
  - Interactions with "Billing" as a concept should all go via an Interface and pyramid_services architecture
  - Development environment Implementation of Interface/Service? Warehouse MUST be developable/testable locally without Stripe Keys. Ideally we can interact with billing locally without stripe keys as well.
  - Sales tax? See action item 1
- Teams
  - Confirming in #11590 semantics around "Administration" and "Upload" privileges/roles. Should we extend the above names to "old school" or individually user owned projects?
    - Organise permissions via more generic relations for "roles" that are initially managed manually in codebase, but leaves room for custom role definitions at the Organisation level later
    - How to handle mapping between DB and Pyramid ACL strings?

Actions
- ☐ Ee: Review PR #11665
- ☐ Ee: Do we need to consider sales tax?
- ☑ ~~Chris: Write out a summary of Role/Permission stuff for discussion on next steps and long term next steps.~~

Project Meeting
July 5, 2022
Attendees: Ee, Chris, Matt, Shamika

Minutes
- Integration with Stripe will take longer than the current sprint.
- Restrict releases and other issues will follow easily once Stripe integration is done.
- Round 2 of testing did not happen yet; contacting new set of testers
- Prioritized backlog issues will be discussed with the team once the payment issues have been resolved
- Should the price be shown in USD or local currencies?

Actions
- ☐ Ee- Should the final price include the sales tax and show it separately?

User Testing- Round 2
6 July, 2022
Attendees- Bernat Gabor

Agenda
- Introductions
- Set scope for round 2 testing
- Screen sharing
- User testing
  - Log in / Create an account
  - Create an organization account
  - Rename an organization
  - Create a project
  - Transfer a project
  - Delete an organization
- Post test interview
- Summarize the feedback
- Goodbye
- Post test interview
- Summarise the feedback
- Goodbye

Minutes
- Bernat has participated in round 1 of testing
- The field name can be changed from Organization Name to Organization desc
- Updating the name of the organization can be done in the same field rather than having a separate section for it
- Org description should be shared with the public or else say it is for approver and therefore will remain private
- Describe the project rather than the org itself
- Bernat was able to delete the organization and rename the organization
- Add a banner that says the org was deleted successfully
- Creating a project and transferring a project did not work
  - When a user does not have any prior projects, creating a new project does not work/

Project Meeting
July 12, 2022
Attendees: Ee, Chris, Matt, Shamika

Minutes
- No design doc to review for payment feature. Create org page will lead to Stripe checkout page.
- Managing subscriptions will be from org settings page
- Sales tax needs to be decided.Needs consultation with the legal team.
- Sales tax has negligible effect on the coding. Stripe will handle most tax related payments. It will be handled as a flag to determine tax code. Need to determine the type of product- software as a service? Does non-profit affect the tax code?
- Role definition in the short term- should we keep it as owner and maintainer or admin and upload? This will be reviewed in the team PR.

Project Meeting
July 19, 2022
Attendees: Ee, Chris, Matt, Shamika

Minutes
- Payment issues in progress; Mostly completed
- Edge cases of payment will be handled manually. Test cases will help with documentation.
- Teams issue- owner and maintainer labels will be kept for humans, for orgs- admin/upload labels will be used. Use administer and upload terms.

Project Meeting
July 26, 2022
Attendees: Ee, Chris, Matt

Minutes
- PSF side:
  - Seeking answers for tax, currency, and Terms of Service for paid pypi features from general counsel and controller. Will seek 3rd party consulting from PSF Executive Director if unable to get answers
  - Mentioned PR bottleneck
- Expected PR this week for billing
- Local dev environment is on the final to-do list. Mockup for checkout and subscription management as well as mock container for stripe API calls is working.
- Priority after billing is backlog and UX/UserFacing. Admin and reporting will be addressed as time and budget allow.
- Reassess status of prioritisation after next round of user testing.

Project Meeting
Aug 2, 2022
Attendees: Ee, Chris, Matt, Shamika

- Billing- Separate Stripe subscriptions, separate Stripe customer model- is it worth it? All models in the subscription model are tied to Stripe. We are not encapsulating Stripe completely. We are encapsulating the actions and implementation details. Prefixing the models with *stripe* would be useful. Create a lookup table. Billing backend has a single configuration variable that has everything for billing.
- Next steps for PSF-
    - Merge billing PR
    - Exhaustive testing
    - Prioritise backlog issues
    - Decide timeline and funding once backlog priorities have been decided

User Testing- Round 3
5 Aug, 2022
Attendees- Sadik Kuzu, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 3 testing
- Screen sharing
- User testing of the issues listed below
- Post test interview
- Summarize the feedback
- Goodbye

Issues
Account management
- Create an organization account
- Add members to an organization
- Assign user roles
- Remove member from an organization
- Cancel user invitation
- Accept user invite
- Reject user invite
- Rename an organization
- Delete an organization

Project management
- Create a project
- Transfer a project

Team management
- Create a new Team
- Add Member to a Team
- Remove Member from a Team
- Assign manage/upload permission
- Rename a Team
- Delete a Team
- Dashboard to see Members, Teams, permission status, and projects

Minutes
- Sadik is from Istanbul and works as a Senior Backend Engineer. Sadik uses Python in web services and packages. The company has used AWS CodeArtifact to set up a private version of PyPI. Sadik maintains squiral. Sadik uses the PyPI website to search for packages every few weeks. They also use other packaging managers like npm, yarn.

- Sadik was able to run through all the issues listed above successfully with a few exceptions.
- An error was raised when transferring a project directly from the project
- Creating an account with a pre-existing name raised an error
- The general feedback was that the features were user friendly and easy to navigate

User Testing- Round 3
5 Aug, 2022
Attendees- Mike Fiedler, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 3 testing
- Screen sharing
- User testing of the issues listed below
- Post test interview
- Summarize the feedback
- Goodbye

Issues
Account management
- Create an organization account
- Add members to an organization
- Assign user roles
- Remove member from an organization
- Cancel user invitation
- Accept user invite
- Reject user invite
- Rename an organization
- Delete an organization

Project management
- Create a project
- Transfer a project

Team management
- Create a new Team
- Add Member to a Team
- Remove Member from a Team
- Assign manage/upload permission
- Rename a Team
- Delete a Team
- Dashboard to see Members, Teams, permission status, and projects

Minutes

Michael suggested the following -
- For the org account name, the validation should also be at the client side

- It should be clear that for companies, the features will be available only when billing details are added
- When a role is assigned to a member, the email shows the enum rather than the role name (organizationroletype.billingmanager)
- The org account change is not intuitive. The UI should mention that to change the org account, the user should scroll down
- There is no email when the org name is changed (not the account)
- Deleting an account should mention what will happen to teams and members
- Teams are listed by insert order. They should be listed by alpha sort or give the owner the ability to sort the team names.
- When adding a member to a team, the message that no org owner, manager or member found with that name seems excessive. Add a link to the list of members.
- When adding a member to a team, if no member exists in the org, the owner should be able to invite the member to join the org and team
- Listing team and collaborators does not make sense (https://capture.dropbox.com/00HEkfPOLCdHY6Bm)
- Org link should not be there under collaborator if the org name at the top is not a link
- Clicking on manage organization leads to People but it is second on the list
- When an owner clicks on an organization, the page should list how many projects, how many teams, how many members exist in the org. This tactical info would be useful to any owner.
- When confirming change of org name, the check is not case sensitive
- When changing an org name, specify that the new org name has to be 50 chars or less
- Are URLs protected against click jacking?
- Disconnect between when do we show a number and when number is not shown
- External collaborator who is also an owner cannot leave the project
- Credit card details- Need to be PCI compliant, cannot view credit card details
- The general feedback was that there is a lot of clicking required to navigate the features

User Testing- Round 3
8 Aug, 2022
Attendees- Stephen Rosen, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 3 testing
- Screen sharing
- User testing of the issues listed below
- Post test interview
- Summarize the feedback
- Goodbye

Issues
Account management
- Create an organization account
- Add members to an organization
- Assign user roles
- Remove member from an organization
- Cancel user invitation
- Accept user invite
- Reject user invite
- Rename an organization

Project management
- Create a project
- Transfer a project

Team management
- Create a new Team
- Add Member to a Team
- Assign manage/upload permission
- Rename a Team
- Remove Member from a Team
- Delete a Team
- Delete an organization
- Dashboard to see Members, Teams, permission status, and projects

Minutes
- Stephen works at Globus, University of Chicago (https://www.globus.org/). Stephen works on webargs, check-jsonschema and globus-sdk-python projects. Besides PyPI, Stephen uses twine, tox and other package managers such as apt, npm, RubyGems, Bundler and Cargo.

Stephen suggested the following-

- It should be possible for an organization to enforce 2FA
- When removing member from an organization, a prompt should appear asking to confirm the operation
- The projects view within the organization is confusing
- A page for each team, separate from the members page, e.g. /manage/organization/globusonline/team/client-tool-developers/ should exist
- Renaming an organization name should have a notification emailed to the owner
- When changing the org account name, choosing a name that already exists should fail rather than showing a banner
- Description of maintainer and administrator should be collapsible
- Bare TLD should be acceptable, auto expand to include https://, should reject ftp:// and other non-http(s) schemes
- There should be a table listing the roles and descriptions in the FAQ page
- Features meet expectations, able to group together users
- UI has imperfect functionality but nothing serious
- Mostly easy to navigate, context of team and project difficult to understand initially within the organization, URL structure made it easy to understand
- Will the API documentation be published? Able to view members, teams and projects from the command line instead of web interface?

User Testing- Round 3
8 Aug, 2022
Attendees- Jakub Kuczys, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 3 testing
- Screen sharing
- User testing of the issues listed below
- Post test interview
- Summarize the feedback
- Goodbye

Issues
Account management
- Create an organization account
- Add members to an organization
- Assign user roles
- Rename an organization account name

Project management
- Create a project
- Transfer a project

Team management
- Create a new Team
- Add Member to a Team
- Assign manage/upload permission
- Rename a Team
- Remove Member from a Team
- Delete a Team
- Delete an organization
- Dashboard to see Members, Teams, permission status, and projects

Billing management
- Recurring monthly Payment
- Update payment details
- Download payment receipts/invoices

Minutes

- When reloading the page after a user has been added to an org, it asks to confirm resubmission. This is not required (i.e. Post/Redirect/Get could be used here)
- When renaming the org account name, show the current name so that it is easy to type
- There is no drop down list for members when assigning administer, upload permission
- There is no confirmation when removing a member from a team
- Assigning role/permission is different for a team and member

User Testing- Round 3
8 Aug, 2022
Attendees- Jürgen Gmach, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 3 testing
- Screen sharing
- User testing of the issues listed below
- Post test interview
- Summarize the feedback
- Goodbye

Issues
Account management
- Create an organization account
- Add members to an organization
- Assign user roles
- Rename an organization account name

Project management
- Create a project
- Transfer a project

Team management
- Create a new Team
- Add Member to a Team
- Assign manage/upload permission
- Rename a Team
- Remove Member from a Team
- Delete a Team
- Delete an organization
- Dashboard to see Members, Teams, permission status, and projects

Billing management
- Recurring monthly Payment
- Update payment details
- Download payment receipts/invoices

Minutes

Jürgen suggested the following
- It is confusing assigning roles to teams, but permissions to members
- Additionally, external collaborators seem extraneous
- Get a drop down list of members when assigning role/permission to an internal collaborator
- The existing drop down list of members looks a bit odd - I was not sure whether the UI element came from the app or the browser
- Deleting a project raised an error
- Change 'Activate Billing' to 'Manage subscription'
- Hierarchical view of the UI is confusing- not clear whether the user in org view or project view

Project Meeting
Aug 9, 2022
Attendees: Ee, Chris, Matt, Shamika

Minutes
- Per seat billing- currently, billing rate is flat. Long term goal is to include metered billing. Start with a token amount and then later on add per seat cost. Change the billing to sign up, get credit card info and then we will invoice on a specific date. Need to include prices per seat and flat fee. BAsic monthly charge will be __ for usual support and then per seat will be __. For becoming supporter level, monthly will be __ in addition to monthly fee. At a regular interval, send a record of seats being used and bill for max of seats.
- When checking out, a price object is passed to Stripe. A quantity (number of seats) should also be passed. Create subscription first and then per seat payment. Default subscription will be zero or a flat fee. Present trial subscription with start and end dates. Configure a task to update usage record for each account. Any time an org adds or removes a member, fire a task that report usage to Stripe.
- Resolve merge conflicts, run migrations to create new models for billing PR

Project Meeting
Aug 16, 2022
Attendees: Chris, Shamika
Apologies: Ee, Matt

Minutes
- Currently the trial is set after checkout. Stripe has set a 19 days free trial. Invoices will be sent on a monthly basis depending on when the company signed up?
- Flat rate + per user usage - backend mapping out done. What will it look like on the UI - this is still to be done. When creating a company org, the next page would lead to Stripe price comparison page that would display tiered support options.
- Backlog issues will be worked on Sept 6 onwards

Project Meeting
Sept. 6, 2022
Attendees: Chris, Matt, Ee, Shamika

Minutes
- Billing PR- where to enter the email? Add an interstitial page and let the user enter a billing email there. UX makes sense to add billing details and email on the same page
- Show billing email along with billing status- grab the email and store it on the warehouse database
- Interstitial page can be expanded to include a form later
- If data is changed, is it captured in the display?

Project Meeting
Sept. 13, 2022
Attendees: Chris, Ee

- Discussed 2PRs merged earlier this week, and update on outstanding PRs
- Billing PR is ready for final review
- Discussed current status, pace, and accuracy of estimate on backlog engagement.
  - 2PRs merged, 1PR open, 14 Issues outstanding.
  - Estimate still feels appropriate on Moonrise side
- Ee to review Billing PR today.

Project Meeting
Sept. 27, 2022
Attendees: Matt, Ee, Shamika

Minutes-
- User test invites have been sent. Waiting for testers to schedule interviews.
- Couple of issues in code review. Other issues being worked on currently.

Project Meeting
Oct. 4, 2022
Attendees: Matt, Chris, Shamika

Minutes-
- Hierarchical UI View issue will take time to code as it requires considerable changes. It will change the layout of the project page.
- No blockers in coding.

Project Meeting
Oct. 11, 2022
Attendees: Chris, Matt, Ee, Shamika

Minutes-
- Four more issues remain to be completed. They are being worked on currently and are expected to be available for review this week.
- Four user interviews have been scheduled.

User Testing - Round 4
14 Oct, 2022
Attendees- Koshlan Mayer-Blackwell, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
    - Rename an organisation account
    - Create a team
    - Add member to a team
    - Remove member from a team
    - Rename a team
    - Delete a team
    - Create a project
    - Transfer a project to an organisation
    - Add internal collaborator
    - Add external collaborator
    - Assign Owner/Maintainer permissions to a collaborator
    - Remove a collaborator
    - Revoke a collaborator invitation
    - Remove project from organisation
    - Transfer a project to another organisation
    - Delete project
    - Change billing details
    - Cancel subscription plan
    - Renew subscription plan
    - Download invoice/receipt
    - Leave an organisation
    - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-

- Koshlan uses PyPI to post the latest tagged versions of the software developed at the Fred Hutchinson Cancer Center. This includes scrc3 and dependency packages. Each user on the team has an account on PyPI and when there is a new release, it is updated on PyPI and other team members are informed about it. Koshlan has used PyPI for about 5-10 years.
- Interested in organization acco@unt features where more than one user can update the packages. Ideally, there should be a seamless transition from Github to a new version becoming available on PyPI.
- Was able to test all features listed above. There was one error.
- General feedback-
  - Select an organisation account name should be create an org name
  - Transferring the project leads to project settings with access denied error code 403
  - Hitting enter should be enough to advance on deletion of organisation or project. Safer to require mouse input to trigger delete.
  - Expectations were met- multiple people can comanage a project

User Testing - Round 4
20 Oct, 2022
Attendees- Thibaud Colas, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
  - Log in / Create an account
  - Create an organisation account
  - Add members to an organisation
  - Assign user roles
  - Remove member from an organisation
  - Cancel user invitation
  - Accept user invite
  - Reject user invite
  - Rename an organisation account
  - Create a team
  - Add member to a team
  - Remove member from a team
  - Rename a team
  - Delete a team
  - Create a project
  - Transfer a project to an organisation
  - Add internal collaborator
  - Add external collaborator
  - Assign Owner/Maintainer permissions to a collaborator
  - Remove a collaborator
  - Revoke a collaborator invitation
  - Remove project from organisation
  - Transfer a project to another organisation
  - Delete project
  - Change billing details
  - Cancel subscription plan
  - Renew subscription plan
  - Download invoice/receipt
  - Leave an organisation
  - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-

- Thibaud is a senior developer at Torchbox Senior developer. Wagtail CMS uses PyPI packages. Torchbox uses 10-30 packages on PyPI. Thibaud uses PyPI as an individual and in a team. One feature of value would be displaying statistics of package downloads on the PyPI website. Thibaud also uses npm and Composer.
- Thibaud was able to run through the different features with the following exceptions
  - Changing the organisation display name showed 404 error
  - Renaming an org to a previously assigned name raised SQLalchemy error
  - When removing a collaborator, the banner says removed role
  - When transferring a project, the project name was not displayed in the dialog box
- Suggestions-
  - Internal collaborators could be a list of users
  - There is a lot of content in the pages.
- The features meet expectations. The pages are easy to navigate.

User Testing - Round 4
20 Oct, 2022
Attendees- Ankit Chaurasia, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
    - Rename an organisation account
    - Create a team
    - Add member to a team
    - Remove member from a team
    - Rename a team
    - Delete a team
    - Create a project
    - Transfer a project to an organisation
    - Add internal collaborator
    - Add external collaborator
    - Assign Owner/Maintainer permissions to a collaborator
    - Remove a collaborator
    - Revoke a collaborator invitation
    - Remove project from organisation
    - Transfer a project to another organisation
    - Delete project
    - Change billing details
    - Cancel subscription plan
    - Renew subscription plan
    - Download invoice/receipt
    - Leave an organisation
    - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-

- Ankit is a senior software developer at Astronomer and a beginner in using PyPI. The astro-sdk package is available on PyPI.
- Feedback
  - The features were sasy to use but billing was difficult to find
  - Access management for Team feature is useful
  - Separate tabs for the left menu

User Testing - Round 4
21 Oct, 2022
Attendees- Dustin Ingram, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
    - Rename an organisation account
    - Create a team
    - Add member to a team
    - Remove member from a team
    - Rename a team
    - Delete a team
    - Create a project
    - Transfer a project to an organisation
    - Add internal collaborator
    - Add external collaborator
    - Assign Owner/Maintainer permissions to a collaborator
    - Remove a collaborator
    - Revoke a collaborator invitation
    - Remove project from organisation
    - Transfer a project to another organisation
    - Delete project
    - Change billing details
    - Cancel subscription plan
    - Renew subscription plan
    - Download invoice/receipt
    - Leave an organisation
    - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-
- Dustin has been associated with PyPI for more than 15 years. Dustin is interested in organization accounts for work and for community projects. The expectations are that it will work like Github organizations.
- Feedback-
  - The number of organizations is difficult to understand
  - Where will the org description be displayed? Clarify how organization description and organization display name will be used on the page where organizations are created
  - Mention we will going to another website (Stripe) when activate subscription is clicked on
  - Clarify which email should be provided on the Stripe page
  - No confirmation message shown when billing was approved. Redirect to the org page rather than create org page.
  - Clicking on org Manage goes to the project page rather than an overview of the org
  - Org roles description is hard to understand. Show matrix or check marks next to each capability. Be explicit about what billing manager cannot do
  - Who changed the user role- share that in email
  - Remove user dialog box- user should be in quotes. Mention who removed in email.
  - Email to join the org shows localhost. It should know the host. This should be resolved.
  - Accepting org invite- org name should be a link
  - New and old org name in changing the org name dialog box should be reversed
  - Unclear what team name will be used for. Is it a display name?
  - No confirmation when adding a user to a team
  - Username should be in quotes in the dialog box when removing a member from a team
  - When deleting a team, add a note that says what will happen to the team members- do users stay in the org
  - On navigation page, the org name should be clickable
  - When a user transfers a project to an org, the user should not lose maintainer status
  - Confusing whether user should be added as internal or external collaborator
  - It should be possible to remove oneself as sole owner if an org exists as another owner
  - Add a link showing where to go when removing a project but there is no sole owner
  - Manage button should land on settings
  - Invite expiry is for 6 hours but it expired earlier. Should not be able to revoke an invitation when the invite has expired.
  - Invoice or receipt should show PyPI instead of warehouse organization. Billing email address in invoice does not change when it has been updated.
  - Remove Ee's email address on invoice if it is displayed there
  - When deleting the org, change message to remove the project or delete project
- Before deploying the following changes should be made
  - When transferring a project to an org, the user should continue to remain the owner
  - Adding an internal/external collaborator should be in a single form.
  - Add context to emails. Who added members to the org?
  - Clarify what each icon refers to - org , project

- Localhost error should be resolved
- Resolve changing org name back to original name exception

User Testing - Round 4
21 Oct, 2022
Attendees- Mike Fiedler, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
  - Log in / Create an account
  - Create an organisation account
  - Add members to an organisation
  - Assign user roles
  - Remove member from an organisation
  - Cancel user invitation
  - Accept user invite
  - Reject user invite
  - Rename an organisation account
  - Create a team
  - Add member to a team
  - Remove member from a team
  - Rename a team
  - Delete a team
  - Create a project
  - Transfer a project to an organisation
  - Add internal collaborator
  - Add external collaborator
  - Assign Owner/Maintainer permissions to a collaborator
  - Remove a collaborator
  - Revoke a collaborator invitation
  - Remove project from organisation
  - Transfer a project to another organisation
  - Delete project
  - Change billing details
  - Cancel subscription plan
  - Renew subscription plan
  - Download invoice/receipt
  - Leave an organisation
  - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-

- Feedback-
  - The org name in the email when the org has been approved should be clickable
  - Email when a user invitation has been revoked says cancelled. It should be changed to revoked.
  - When removing a collaborator, if it is a team being removed, the dialog box should say team and not username.
  - No email when collaborator invite was revoked.
  - No email when project is deleted
  - When the org name is updated, the invoice shows the old name. Should the invoice show url name or display name?
  - When deleting org, display a warning that says download invoices and cancel the subscription plan
  - The link to return to PyPI from Stripe should be clearer to see.
  - Security history should be paginated

User Testing - Round 4
24 Oct, 2022
Attendees- Ash Berlin-Taylor, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
    - Rename an organisation account
    - Create a team
    - Add member to a team
    - Remove member from a team
    - Rename a team
    - Delete a team
    - Create a project
    - Transfer a project to an organisation
    - Add internal collaborator
    - Add external collaborator
    - Assign Owner/Maintainer permissions to a collaborator
    - Remove a collaborator
    - Revoke a collaborator invitation
    - Remove project from organisation
    - Transfer a project to another organisation
    - Delete project
    - Change billing details
    - Cancel subscription plan
    - Renew subscription plan
    - Download invoice/receipt
    - Leave an organisation
    - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-
- Ash works for Astronomer and is one of the core committers for Apache Airflow. Many packages are hosted on PyPI. Ash has also used Rubygems and CPAN.
- Feedback-
  - Updating the display name of org shows 404
  - No indication of internal vs external collaborator
  - Return to org from Stripe is not obvious
  - The features were easy to use
  - One possible feature that could be implemented was providing access via Okta

Project Meeting
Oct. 25, 2022
Attendees: Chris, Matt, Ee, Shamika

Minutes-
- Chris and Matt to work on issues #12417 and #12418
- Launch is expected to happen in 2-5 months. Need to sort out legal and financial details.
- Stripe settings doc to be shared by Chris-
  https://docs.google.com/document/d/1R_n6MXy7puQMxlSPLkKGq2ss-xBRN3wffLji_4ZsnOU/edit#heading=h.pjlnas264elv

User Testing - Round 4
27 Oct, 2022
Attendees- Mario Corchero, Shamika, Alyssa Wright
Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
  - Log in / Create an account
  - Create an organisation account
  - Add members to an organisation
  - Assign user roles
  - Remove member from an organisation
  - Cancel user invitation
  - Accept user invite
  - Reject user invite
  - Rename an organisation account
  - Create a team
  - Add member to a team
  - Remove member from a team
  - Rename a team
  - Delete a team
  - Create a project
  - Transfer a project to an organisation
  - Add internal collaborator
  - Add external collaborator
  - Assign Owner/Maintainer permissions to a collaborator
  - Remove a collaborator
  - Revoke a collaborator invitation
  - Remove project from organisation
  - Transfer a project to another organisation
  - Delete project
  - Change billing details
  - Cancel subscription plan
  - Renew subscription plan
  - Download invoice/receipt
  - Leave an organisation
  - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-
- Mario works for Bloomberg. Mario uses PyPI as an individual and as part of an organization. Mario would like to see programmatic APIs on PyPI. At Bloomberg, the team shares a couple of accounts. Project owners have their own accounts.
- Mario wanted to know if PyPI can add features for subscribing to packages to build automation around package consumption. There is also concern over how vendors such as Artiifactory provide PyPI as features are limited.
- All the features met expectations and they seem to offer proper organization support.
- Outstanding question - What will the billing model look like?

User Testing - Round 4
9 Nov, 2022
Attendees- Konstantina Tsagkari, Shamika

Agenda
- Introductions
- Introduce the project
- Set scope for round 4 testing
- Screen sharing
- User testing
    - Log in / Create an account
    - Create an organisation account
    - Add members to an organisation
    - Assign user roles
    - Remove member from an organisation
    - Cancel user invitation
    - Accept user invite
    - Reject user invite
    - Rename an organisation account
    - Create a team
    - Add member to a team
    - Remove member from a team
    - Rename a team
    - Delete a team
    - Create a project
    - Transfer a project to an organisation
    - Add internal collaborator
    - Add external collaborator
    - Assign Owner/Maintainer permissions to a collaborator
    - Remove a collaborator
    - Revoke a collaborator invitation
    - Remove project from organisation
    - Transfer a project to another organisation
    - Delete project
    - Change billing details
    - Cancel subscription plan
    - Renew subscription plan
    - Download invoice/receipt
    - Leave an organisation
    - Delete an organisation
- Post test interview
- Summarise the feedback
- Goodbye

Minutes-

- Konstantina works at an IT cooperative in Barcelona. The team includes a group of developers working on the Odoo OS framework in Python. All projects are open source.
- The team uses one account on PyPI that is shared.
- Konstantina has been using PyPI for 2 years. Has also used npm.
- The general feedback was that the features are straightforward.