Organizations with the BigML Dashboard

The BigML Team

Version 1.0

MACHINE LEARNING MADE BEAUTIFULLY SIMPLE

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About this Document

This document provides a comprehensive description of BigML organizations using the BigML Dashboard. Learn how to use the BigML Dashboard to create organizations, invite other BigML users to collaborate, manage their permissions, and create projects and resources within the organization.

This document assumes that you are familiar with the BigML Dashboard environment and resources, including projects, as described in the following Introduction video.

Optionally, you can check our extensive Dashboard documentation:

- Sources with the BigML Dashboard. The BigML Team. June 2016. [6]
- Datasets with the BigML Dashboard. The BigML Team. June 2016. [5]

To learn how to use the BigML Dashboard to build supervised predictive models read:

- Classification and Regression with the BigML Dashboard. The BigML Team. June 2016. [3]
- Time Series with the BigML Dashboard. The BigML Team. July 2017. [7]

To learn how to use the BigML Dashboard to build other unsupervised models read:

- Cluster Analysis with the BigML Dashboard. The BigML Team. June 2016. [4]
- Anomaly Detection with the BigML Dashboard. The BigML Team. June 2016. [1]
- Association Discovery with the BigML Dashboard. The BigML Team. June 2016. [2]
- Topic Modeling with the BigML Dashboard. The BigML Team. November 2016. [8]

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CHAPTER 1

Introduction

Machine Learning projects usually involve many people from different teams and departments that need to work on and/or visualize the same resources. An **organization** in BigML is a **collaborative workspace** where **several users** can work on the same projects from different accounts at different **permission levels**.

To create an organization in BigML, you need to buy a **subscription** for the organization. The organization subscriptions work exactly the same as the personal subscriptions: there is a maximum size for the dataset and a maximum of parallel tasks per user. The personal account subscription and the organization subscription work independently from each other. Depending if you are working in the organization or in your personal account, you will enjoy the corresponding subscription. See Section 3.4 to learn more about this.

This document provides a comprehensive description of organizations in BigML. First, find an overview of how organizations work in Chapter 2. The following chapters provide more detailed descriptions of how to create an organization (see Chapter 3), how to invite new users to an organization (Chapter 4), and how to create projects in an organization (Chapter 5). Finally, you can find an explanation about how to manage the organization account, which includes the subscription, the profile, and the deletion of the organization (Chapter 6).

If you do not belong to any organization, you will see your **personal account** selected on top of the project list (Figure 1.1) and also in the BigML Dashboard (Figure 1.2).

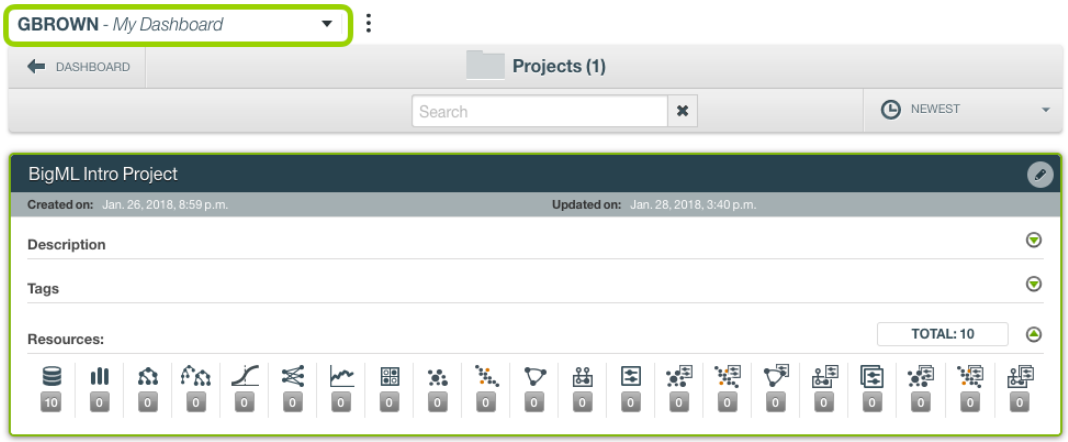

Figure 1.1: Your personal account in the project list

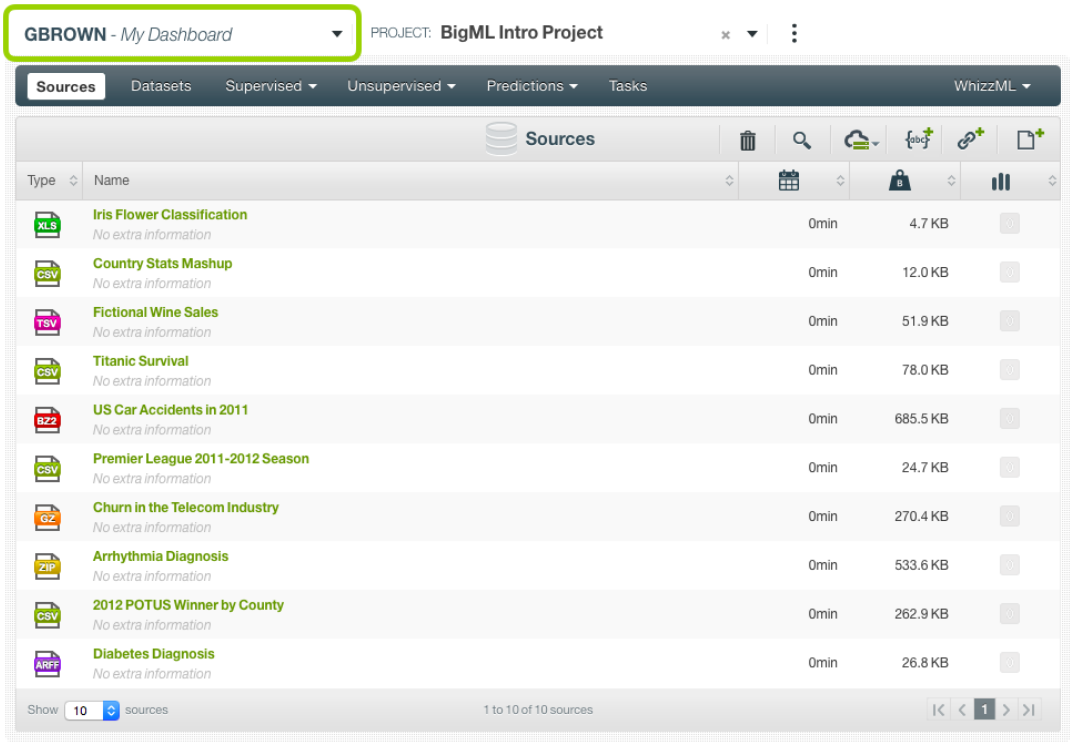

Figure 1.2: Your personal account in the Dashboard

When you belong to an **organization** you will be able to find it in the organization selector in the project list view (Figure 1.3).

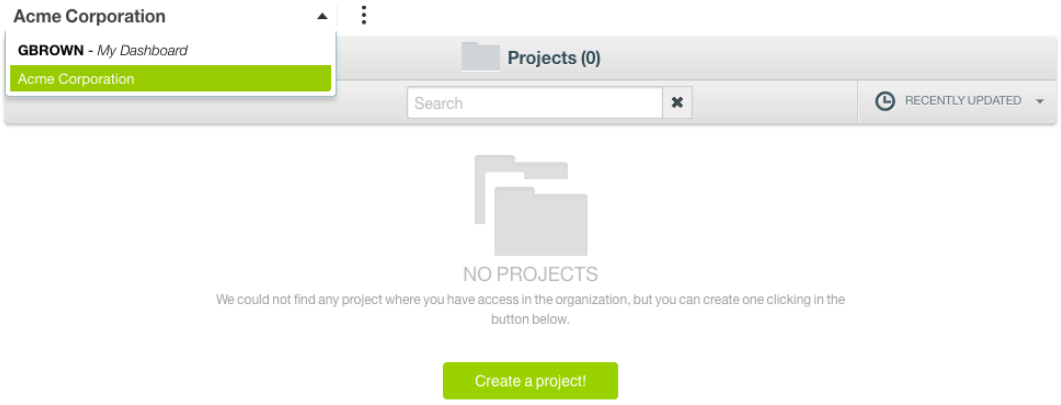

Figure 1.3: Select the organization in the project list view

If the organization has **no projects**, you will not be able to create any resource in the organization. If you try to go to the organization Dashboard, a modal window to create a new project will be displayed (see Figure 1.4). The main reason for this is because the different levels of permissions to access the resources are given by project, so resources need to be created within a project in the organization Dashboard.

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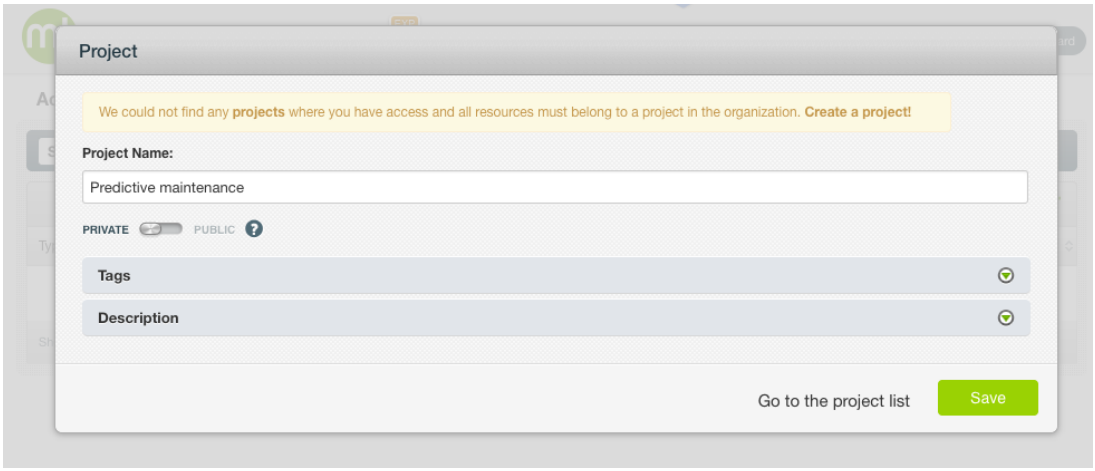

Figure 1.4: Create your first project in the organization

When you create a project, you will be able to go to the organization Dashboard and start creating resources (see Figure 1.5).

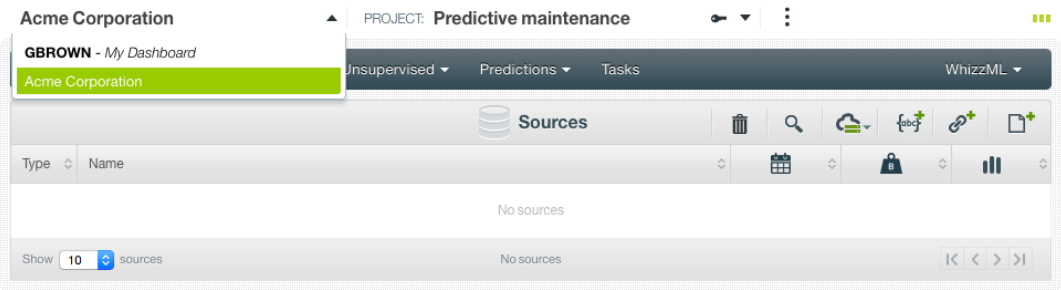

Figure 1.5: Select the organization in the Dashboard

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CHAPTER 2

Understanding Organizations in BigML

BigML organizations respond to the need of multiple users having to work together on the same Machine Learning projects. By creating an organization, the BigML Dashboard becomes a collaborative workspace where **all the users in the organization** can access, work on, and visualize the same **projects** and **resources**. Find a detailed explanation of the organization Dashboard in Section 2.1.

Another essential piece of organizations is the definition of the different roles and permissions per user. Each user in the organization will have a **role** in the **organization** and different **permissions** per **project** as explained in Section 2.2.

2.1 The Organization Dashboard

By creating an organization or accepting the invitation to an organization in BigML, you will enjoy two separate workspaces:

- **Personal account**: you will still be able to access **your own Dashboard** in the same way you are accostumed to. All the **projects** and **resources** created in this space will remain totally **private**.
- **Organization account**: the organization Dashboard works exactly the same as your personal Dashboard, the two main differences are (1) resources and projects are **not private** anymore (other members in the organization can view and use them) and (2) no **resource** can be created without belonging to a **project**. The main reason for this is that permissions are granted at the project level, not at the resource level. Therefore, all resources must belong to a given project where different users will have different permissions.

You can **navigate** between those two environments by selecting **your Dashboard** or the **organization Dashboard** as shown in Figure 2.1

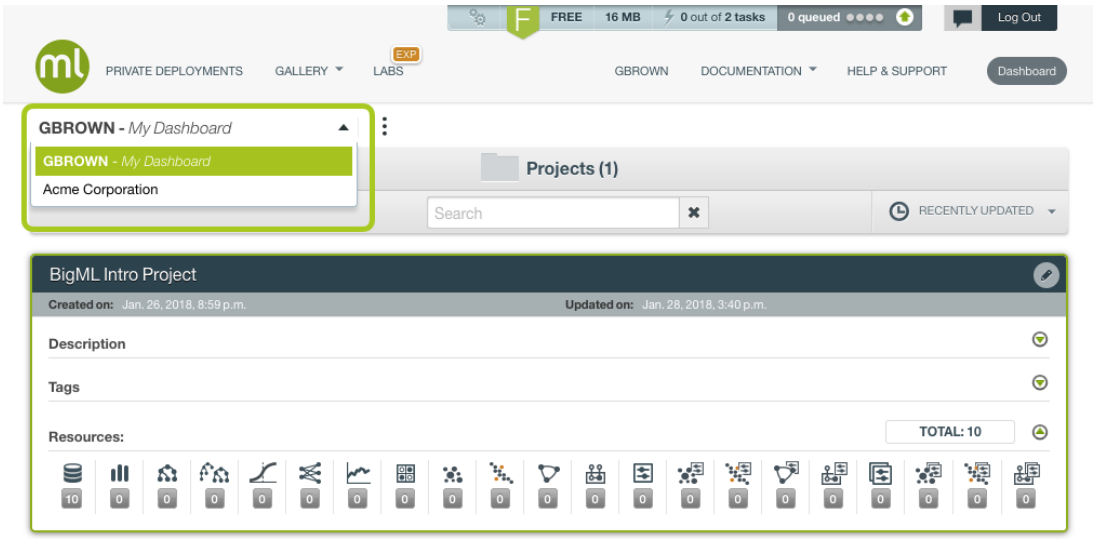

Figure 2.1: Navigate between the organization Dashboard and your personal Dashboard

The organization will have a **separate subscription plan** from your personal account. Depending on the workspace you are working on, you will enjoy the **subscription** that applies to that workspace. The information of the corresponding subscription will be shown in the top menu of the Dashboard as shown in Figure 2.2. You can read more information about organization subscriptions in Section 3.4.

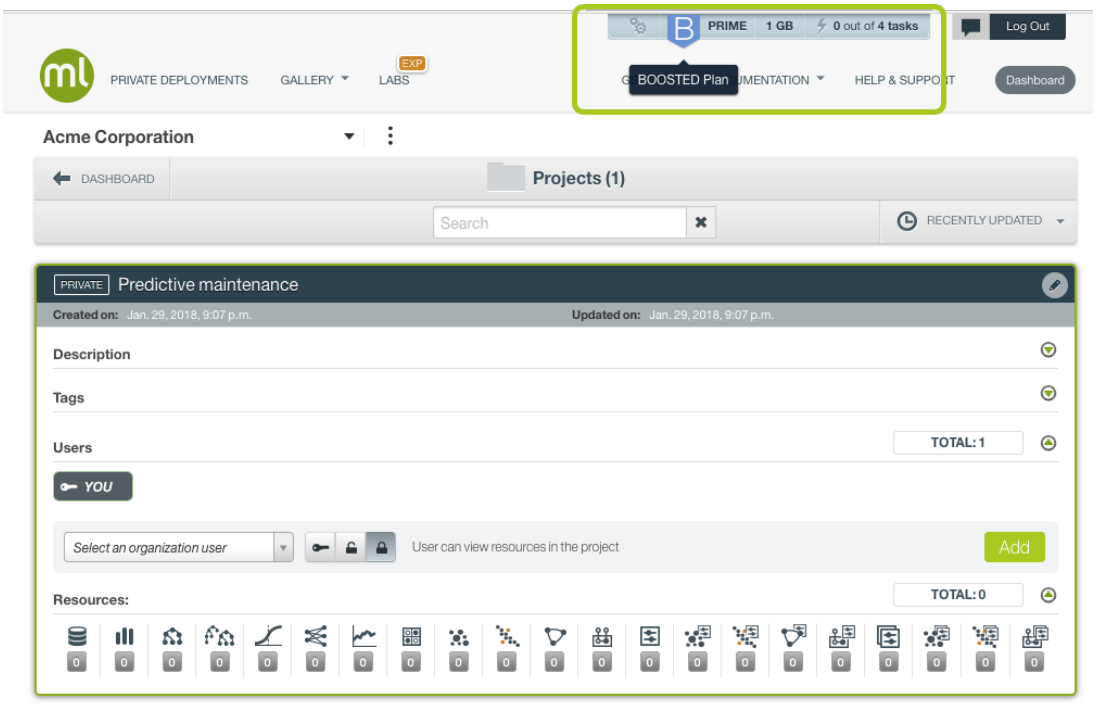

Figure 2.2: Organization subscription

You can **move** resources from your **personal account** to the **organization**, but not the other way around (to avoid privacy conflicts).

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2.2 User Roles and Permissions

Each user in the organization will have a defined **role** and different **permissions** per project. See a detailed explanation of the roles and permissions in the tables below.

- **Roles**: define the user **actions in the organization**, i.e., management of the organization account and the creation of and access to projects. The four different roles are described in the Table 2.1 below. You can assign roles when users are invited to the organization (see Section 4.1) and edit them afterwards from the organization account (see Section 4.3).

Organization Action	Owner	Admin	Member	Restricted Member
Manage the organization subscription plan	✓			
Edit the organization info	✓			
Delete the organization	✓			
Invite users to the organization	✓	✓		
Manage user roles in the organization	✓	✓		
Access all projects in the organization	✓	✓		
Create projects in the organization	✓	✓	✓	
Access all public projects	✓	✓	✓	✓
Access private projects with permissions	✓	✓	✓	✓

Table 2.1: Organization roles

Note: the organization needs at least one owner. The owner will be the creator of the organization by default. The owner can transfer ownership to another user in the organization. There can only be one owner per organization.

- **Permissions**: define the **user actions in the projects**, i.e, the project metadata, users, and access to the project resources. The three different levels of permissions are described in the Table 2.2 below. You can manage the user permissions for each project (see Subsection 5.2.2).

Project Action	Admin Permissions	Write Permissions	Read Permissions
Invite users to the project	✓		
Manage user permissions in the project	✓		
Edit the project name, description and tags	✓		
Delete the project	✓		
Create, edit and delete resources in the project	✓	✓	
Move resources to another organization project	✓	✓	
View resources in the project	✓	✓	✓
Create local predictions	✓	✓	✓

Table 2.2: Project permissions

Note: the different levels of permissions are only editable for private projects. For public projects, all users in the organization have write permissions (see Section 5.1).

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CHAPTER 3

Creating an Organization

To create an organization, you just need to have a BigML account. Click on the option NEW ORGANIZATION from the projects list view (Figure 3.1) or from the Dashboard (Figure 3.2).

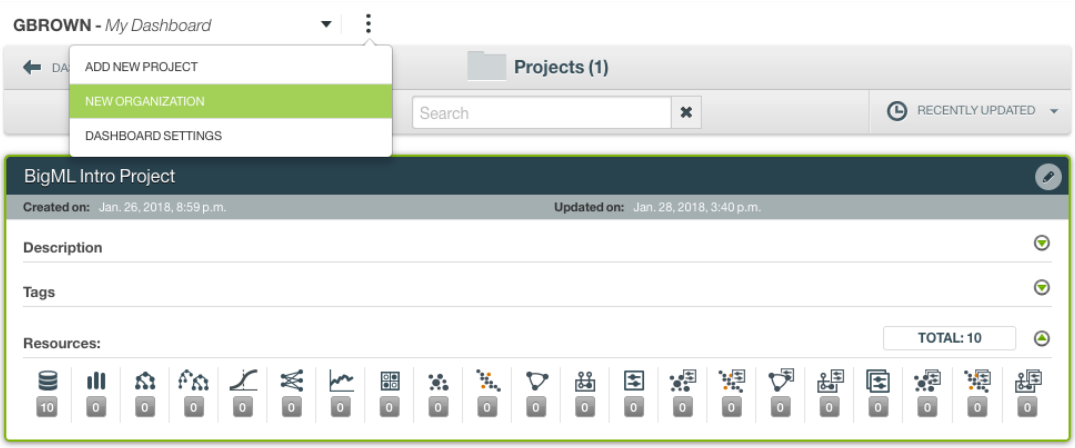

Figure 3.1: Create an organization from the projects list view

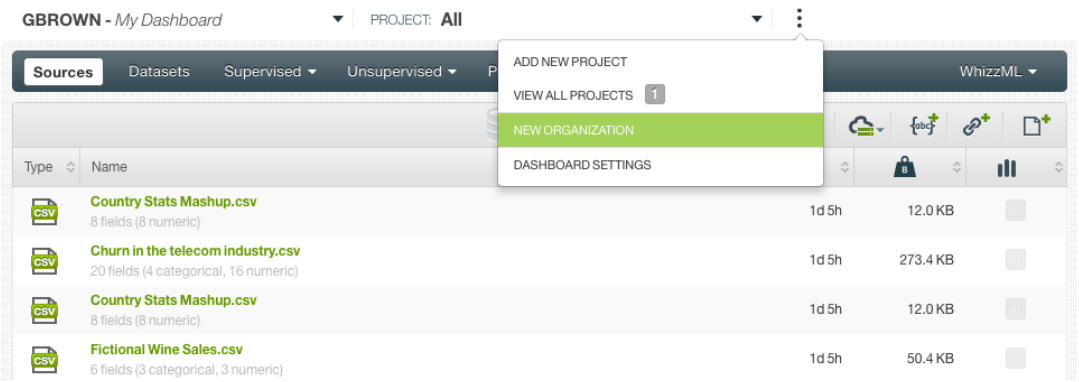

Figure 3.2: Create an organization from the Dasboard

Alternatively, access your **personal account**, select the **Organizations** section and click the Create organization button (see Figure 3.3).

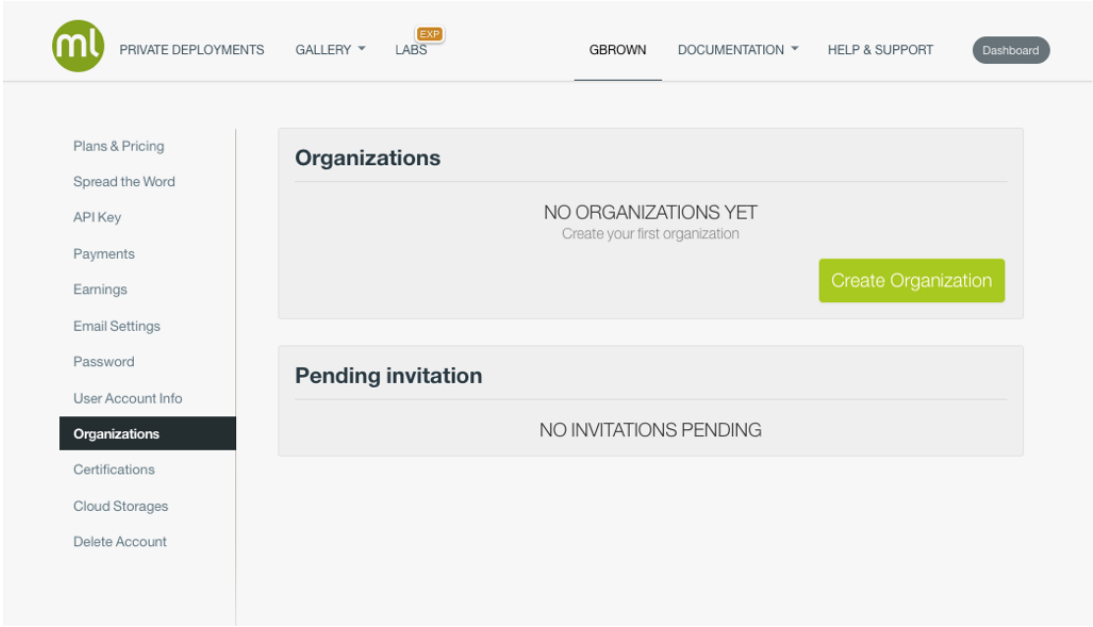

Figure 3.3: Create an organization from your account

There are two main requirements during the creation process: setting a **name** (Section 3.1) and buying a **subscription** for the organization (see Section 3.4). You can also add the billing details as you create the organization (Section 3.3), or you can edit them afterwards.

3.1 Organization Name

Set the **name** of the organization in the text box shown in Figure 3.4. You can set a name between 3 and 30 characters long. This name cannot include spaces or characters other than letters, numbers, underscores, and dashes. The main reason is that the name will be used in the URL of the organization page that lists all the projects.

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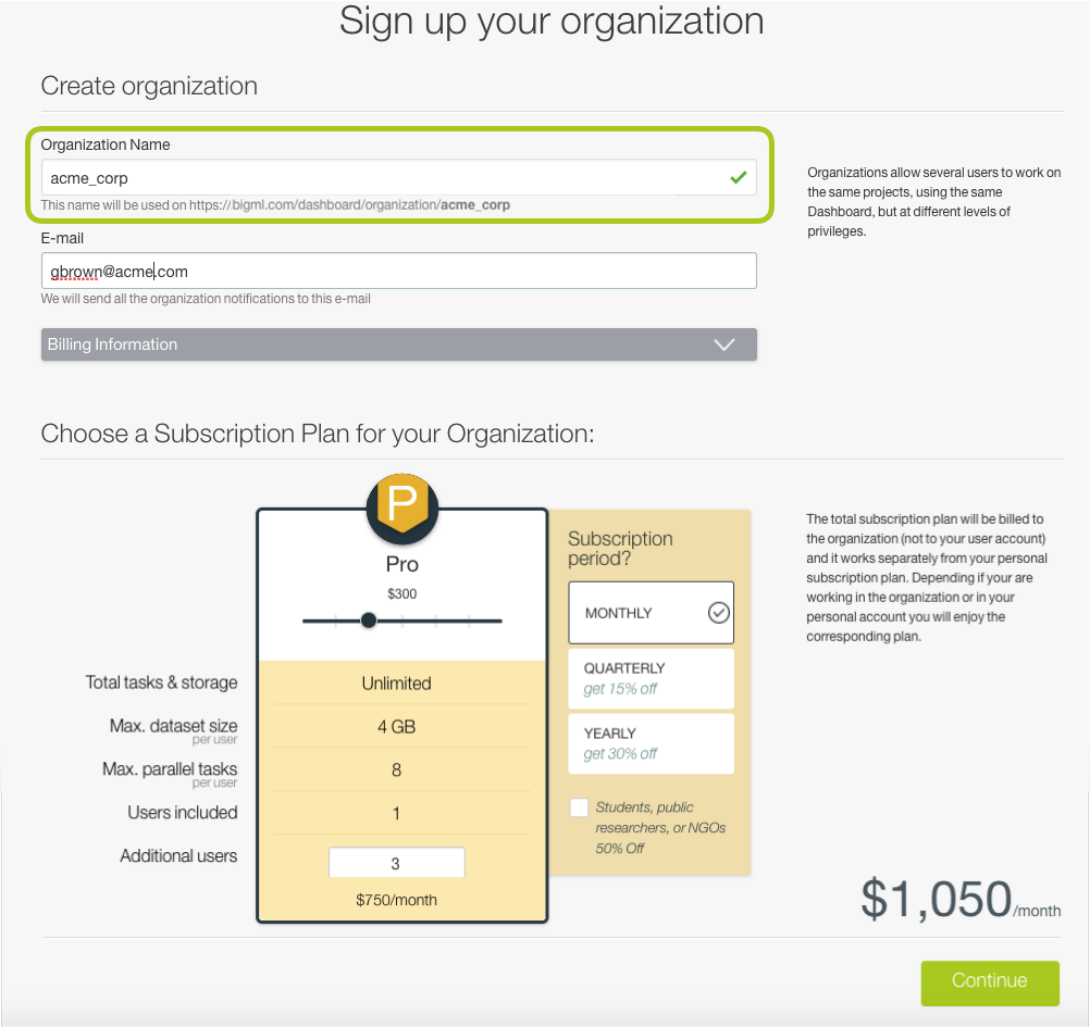

Figure 3.4: Set the organization name

You **cannot edit** the organization name once the organization has been created, so the name of the URL will always remain the same. However, you can edit the **display name** that will appear in the Dashboard and all the organization notifications (see Section 6.4).

3.2 Organization E-Mail

You can also set an **e-mail for the organization**. This e-mail is the one where BigML will send all the notifications regarding the organization activity. By default, BigML prefills this field with the e-mail associated to your **personal account**.

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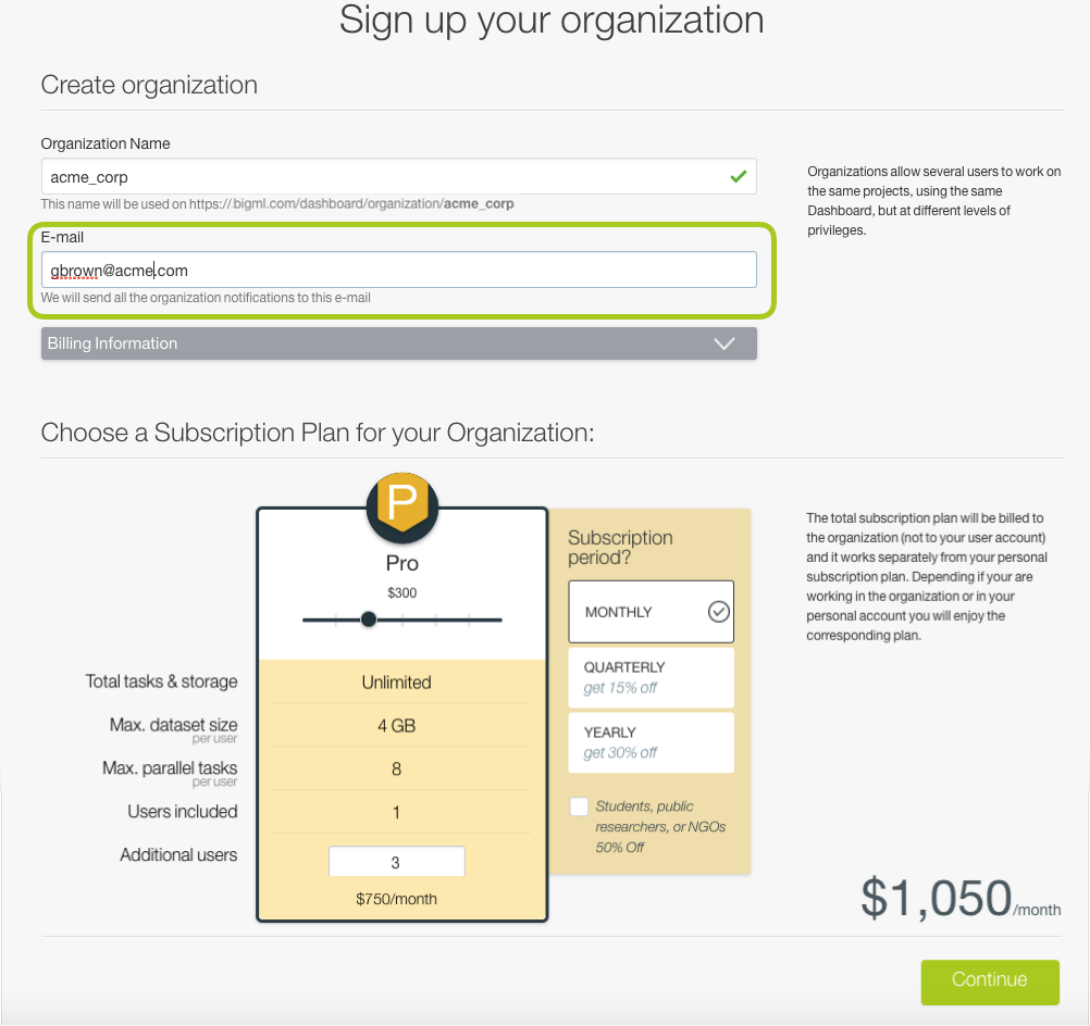

Figure 3.5: Set the organization e-mail

3.3 Billing Details

You can optionally include the **billing details** of the person or the company that will be billed for the subscription. This information, if provided, will be included in the invoices that BigML sends you periodically via e-mail and that you can also find in the organization account (see Section 6.3). This information is optional, so you can add or edit it later on from the organization account (see Section 6.4).

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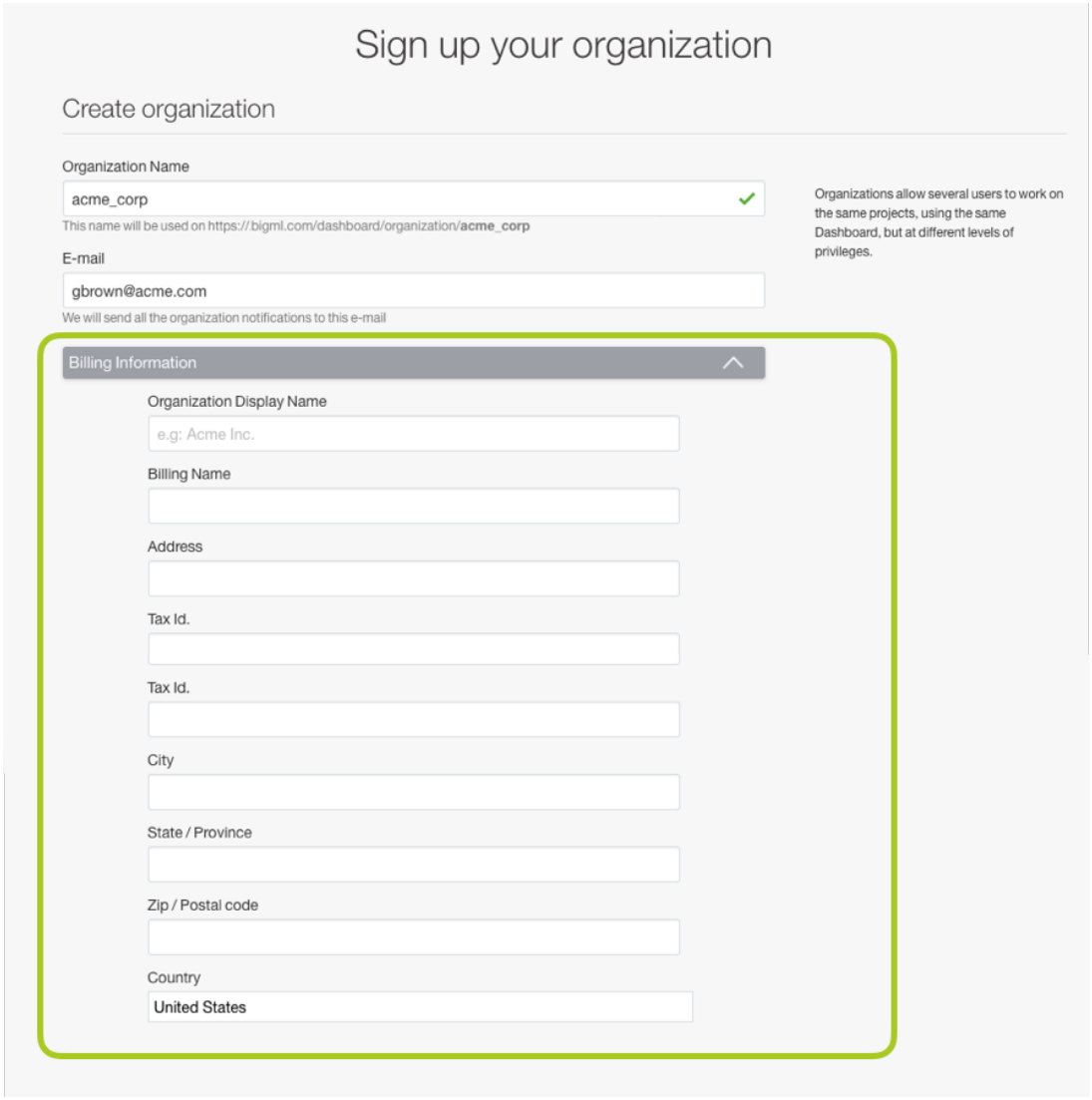

Figure 3.6: Include the billing information for the organization (optional)

3.4 Organization Subscription

To create an organization, you need to buy a **subscription plan**. The subscription plans for organizations work the same way as they do for the personal accounts. Each user in the organization will be limited by the **maximum dataset size** and the **maximum parallel tasks** depending on the subscription plan[1] purchased.

Each subscription plan includes one user and you can add as many **additional users** as you wish. Each user will have an extra cost per month, per quarter, or per year, depending on the subscription period you select. For a quaterly subscription period, you will enjoy a 15% discount and for a yearly period a 30% discount. You need to add at least one additonal user to create an organization, i.e, the **organization** must include at least **two users** to be created.

Note: the subscription limits for the organization apply to each user. E.g., if you buy a PRO plan and 4 users, each user in the organization will enjoy a maximum dataset size of 4 GB and a maximum of 8 parallel tasks.

[1] https://bigml.com/pricing#subscriptions

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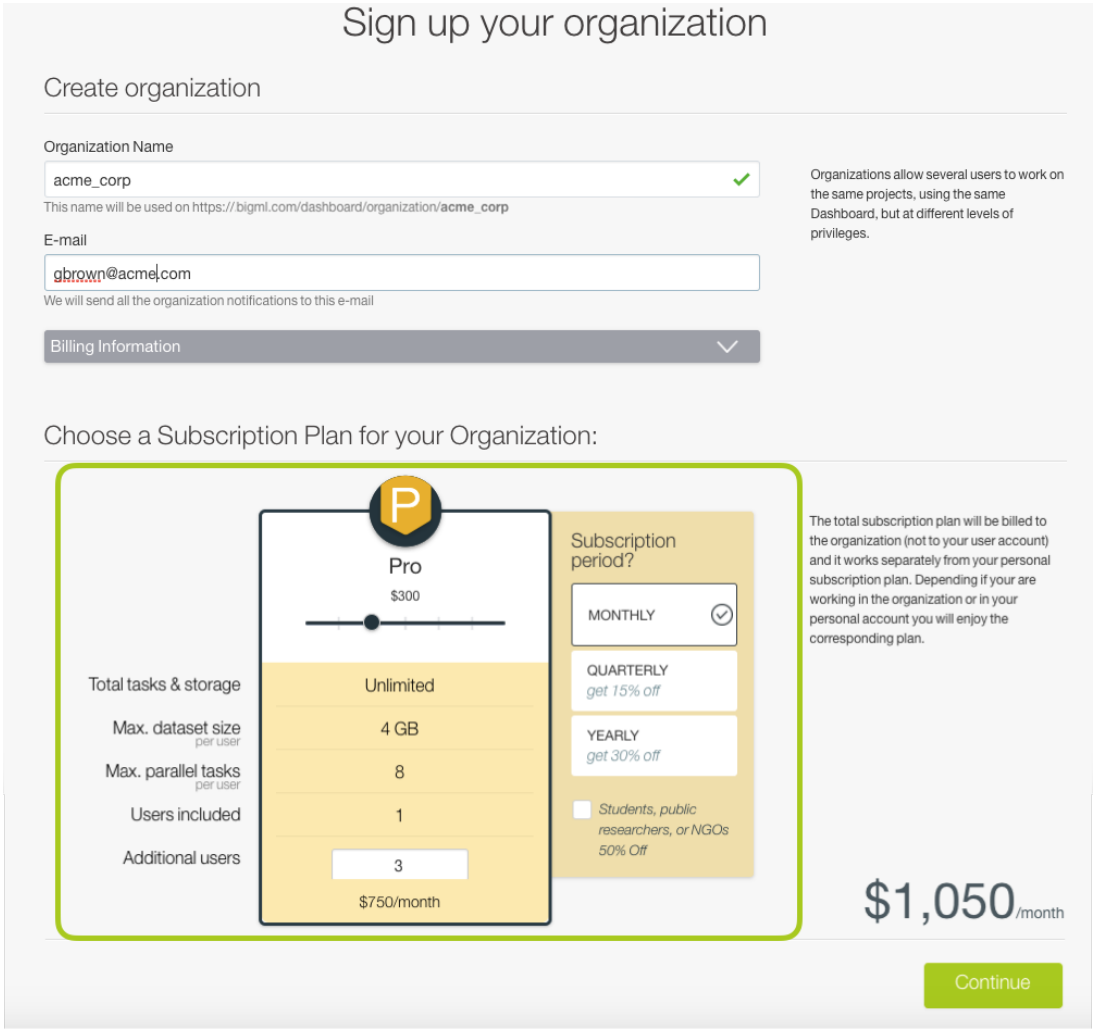

Figure 3.7: Buy a subscription for the organization

The **organization subscription** works independently from the **personal account subscription**. If you are working in the organization Dashboard, you will enjoy the limits set by the organization subscription and if you are working in your personal Dashboard, you will enjoy the limits set by your personal subscription. You can find in the top menu the information of each subscription according to the Dashboard you select (see Figure 3.8).

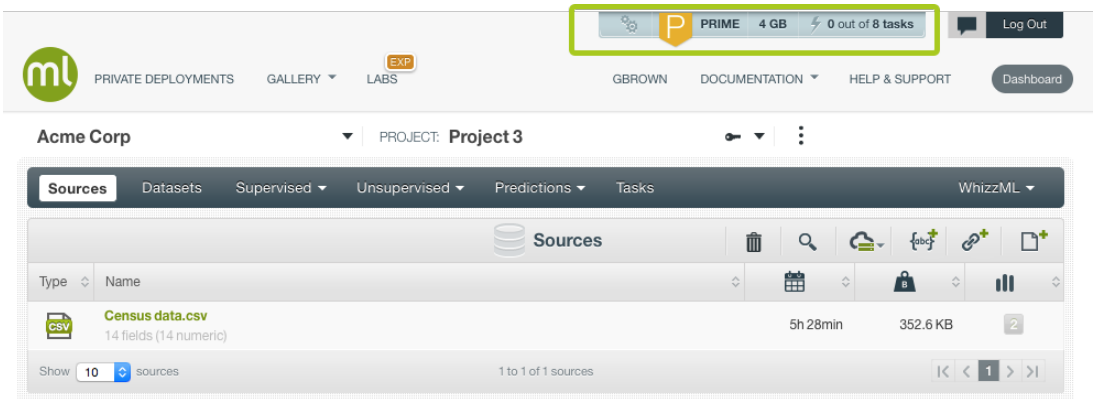

Figure 3.8: See the organization subscription limits

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CHAPTER 4

Managing Users in the Organization

Only users with **owner** or **admin** roles can manage other users in an organization. The users are managed from the organization account. You can access the organization account from the project list view by clicking on the ORGANIZATION SETTINGS menu option as shown in Figure 4.1.

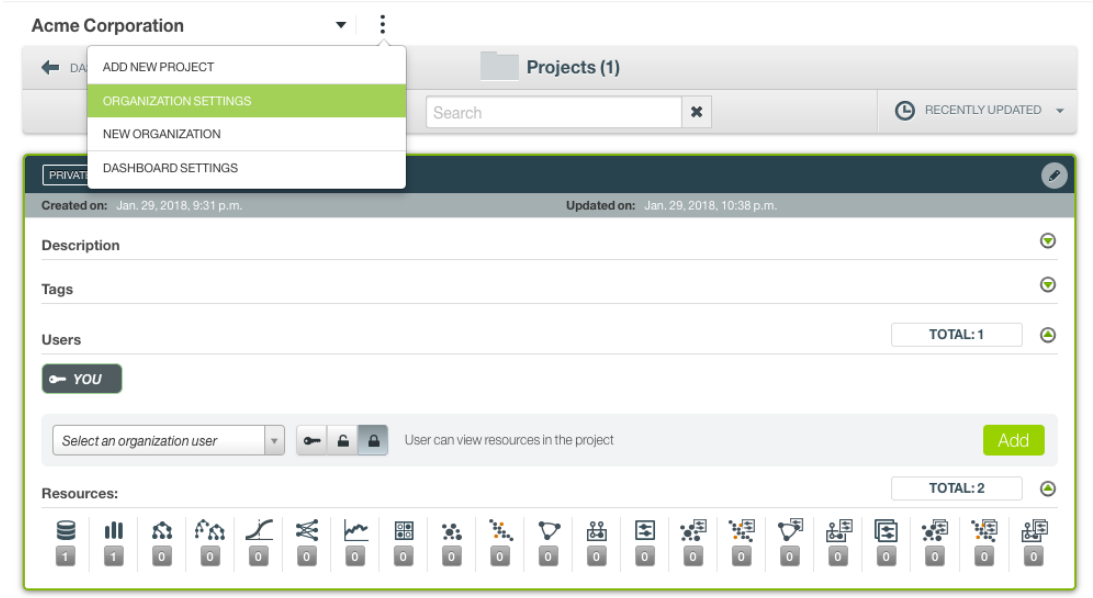

Figure 4.1: Access the organization settings from the project list view

You can also find the same option from the organization Dashboard (Figure 4.2)

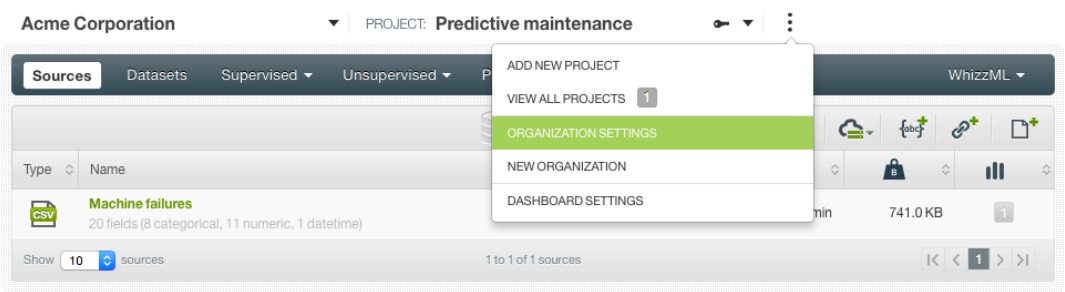

Figure 4.2: Access the organization settings from the Dashboard

Alternatively, from your **personal account**, click the **Manage organization** icon next to the organization name in the **Organizations** section. (See Figure 4.3.)

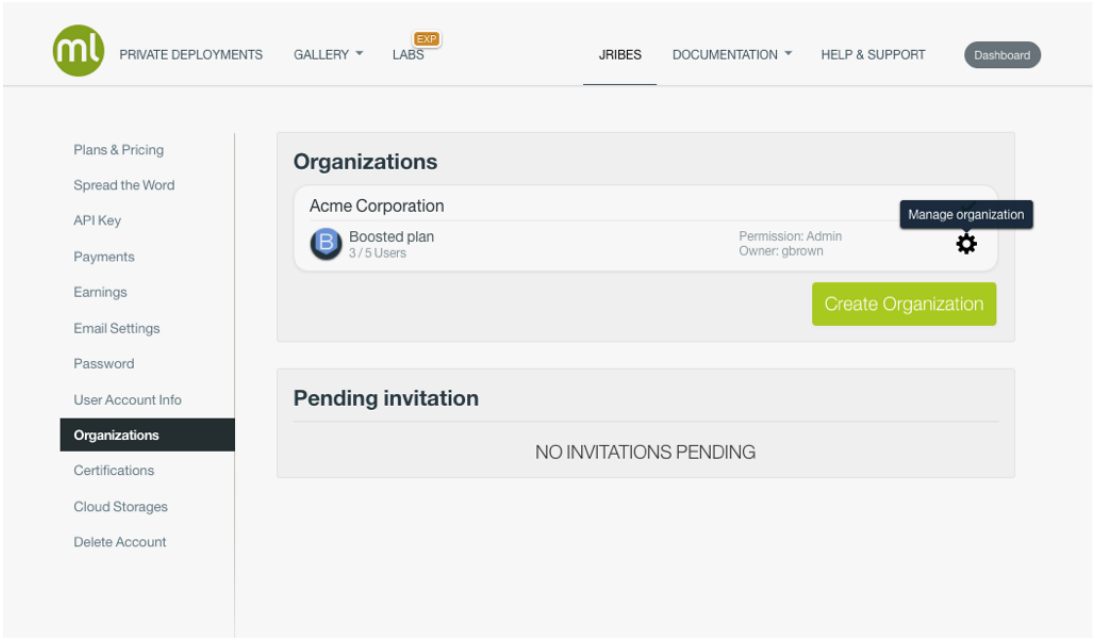

Figure 4.3: Manage your organization from your account

From the organization account, select the **Users** section. When you first create an organization, you will see only yourself in this section as the owner of the organization (see Figure 4.4).

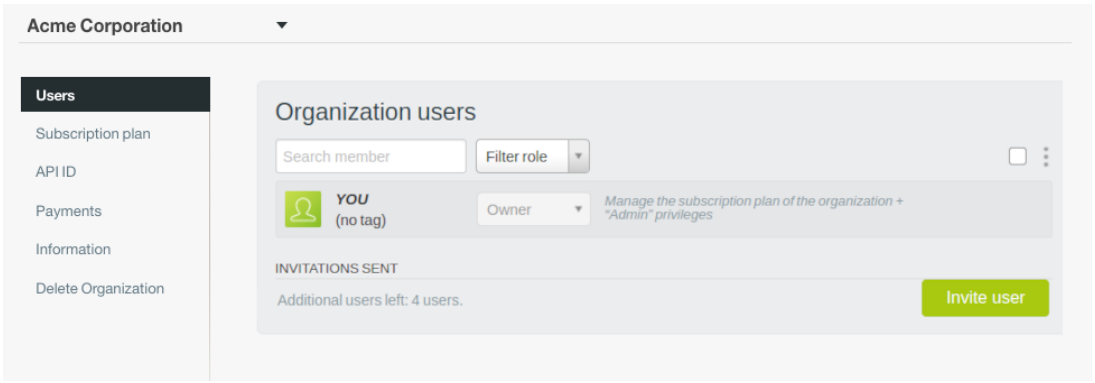

Figure 4.4: Users section in the organization account

From this section **invite** new users (see Section 4.1), **revoke** an existing invitation (see Section 4.2), **manage** user **roles** in the organization (see Section 4.3), and **remove** users from the organization (see Section 4.4).

4.1 Inviting Users

If you are the **owner** or the **admin** of an organization, you can invite other users to join the organization. You can invite as many users as your **subscription plan** allows (see Section 3.4). You can see the number of users you can still invite to the organization as shown in Figure 4.5 (in this example you could invite 4 more users).

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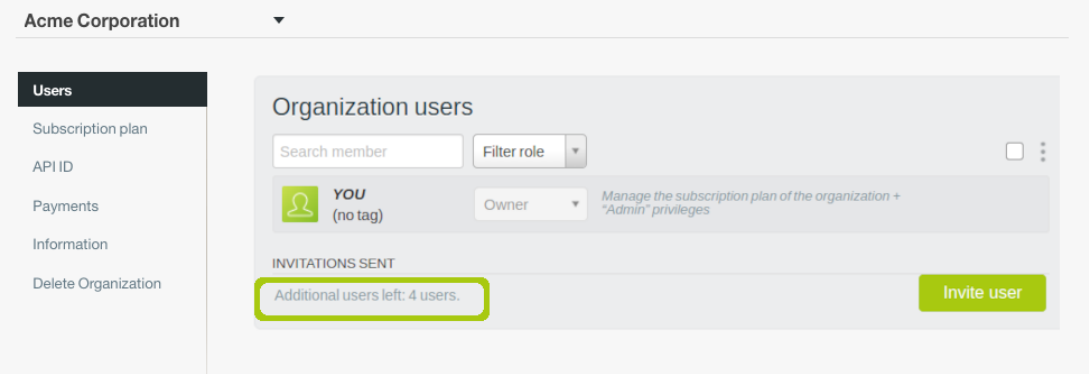

Figure 4.5: Users allowed by your subscription plan

Users can be invited to join the Organization in a one-by-one basis or by using special organization invitation links that will be shared with them via email allowing self-registration in the Organization. In the first scenario, the administrator can specify all the permissions and projects that the user is allowed to use upon registration. In the latter, all users will be registered with the same minimal permissions and they'll only have access to public projects in the Organization unless the owner or administrators activate the option to automatically create a private project. Any special permissions or the access to non-public projects in the organization will need to be granted later by the administrator.

4.1.1 Individualized Invitation

To invite a new user, follow these steps:

1. Click on the Invite user button (Figure 4.6).

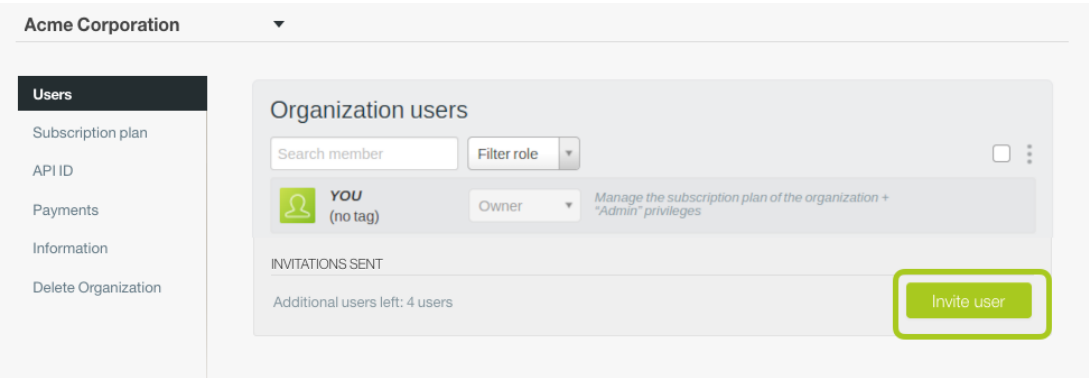

Figure 4.6: Invite a new user

The invitation form will be displayed (Figure 4.7).

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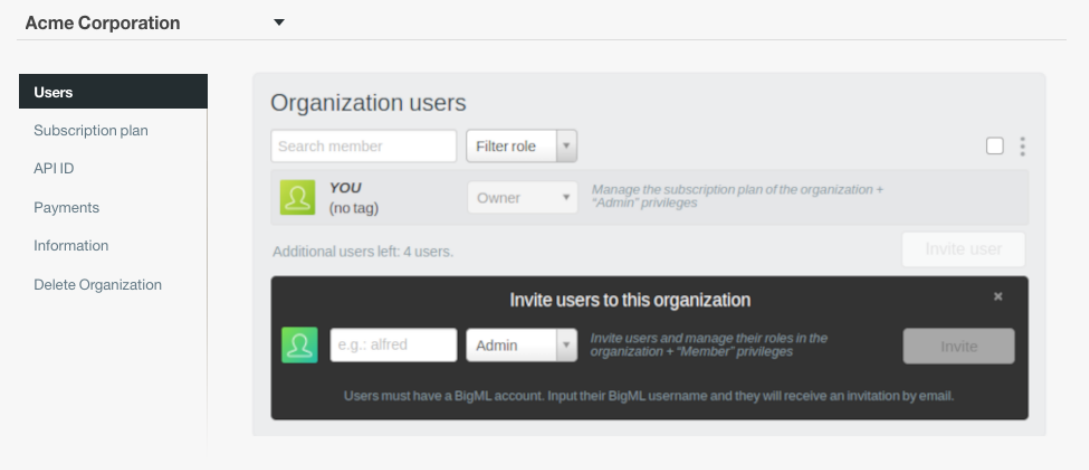

Figure 4.7: Insert the BigML user name and select a role

2. Insert the **BigML user name** of the new user you want to invite. The new user must have a BigML account. Also **select the role** you want for this user in the organization. You can find a brief role definition next to the selector (see all role descriptions in Table 2.1). By default, new users will have member roles. When you have already inserted the user name and selected the role, click the Invite button.

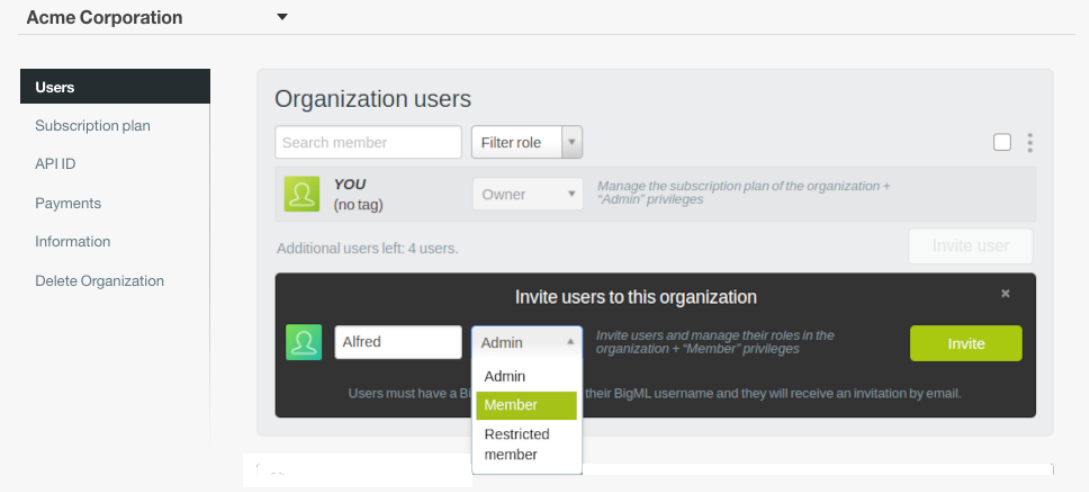

Figure 4.8: Insert the BigML user name and select a role

3. If the **user name** is **correct**, you will see the new user in the **INVITATIONS SENT** section along with a message to inform you the invitation is awaiting confirmation (see Figure 4.9).

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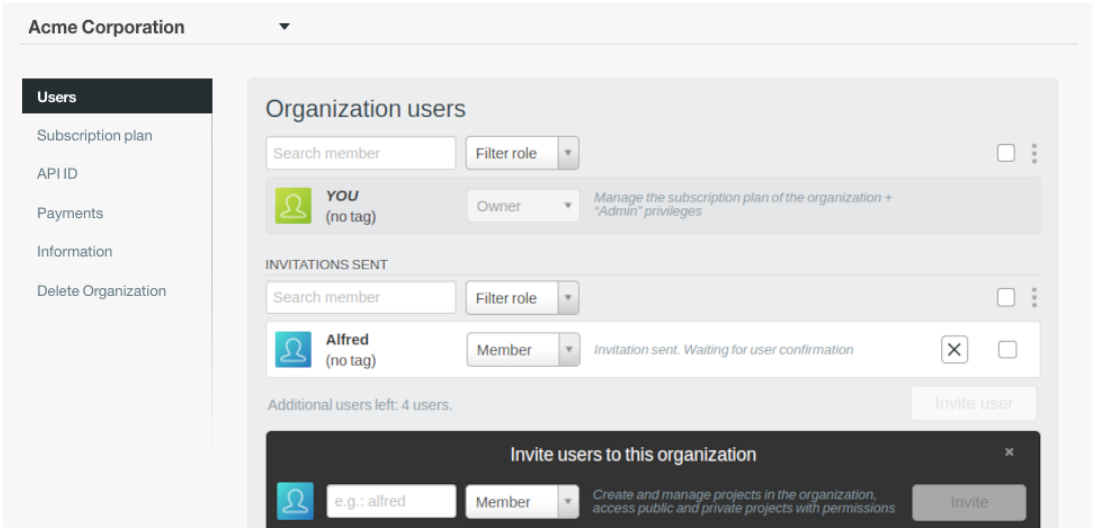

Figure 4.9: Invitation awaiting confirmation

The invitee will receive an invitation via e-mail and also a **notification** in his or her **personal BigML account** in the **Organizations** section so he or she can accept or reject the invitation.

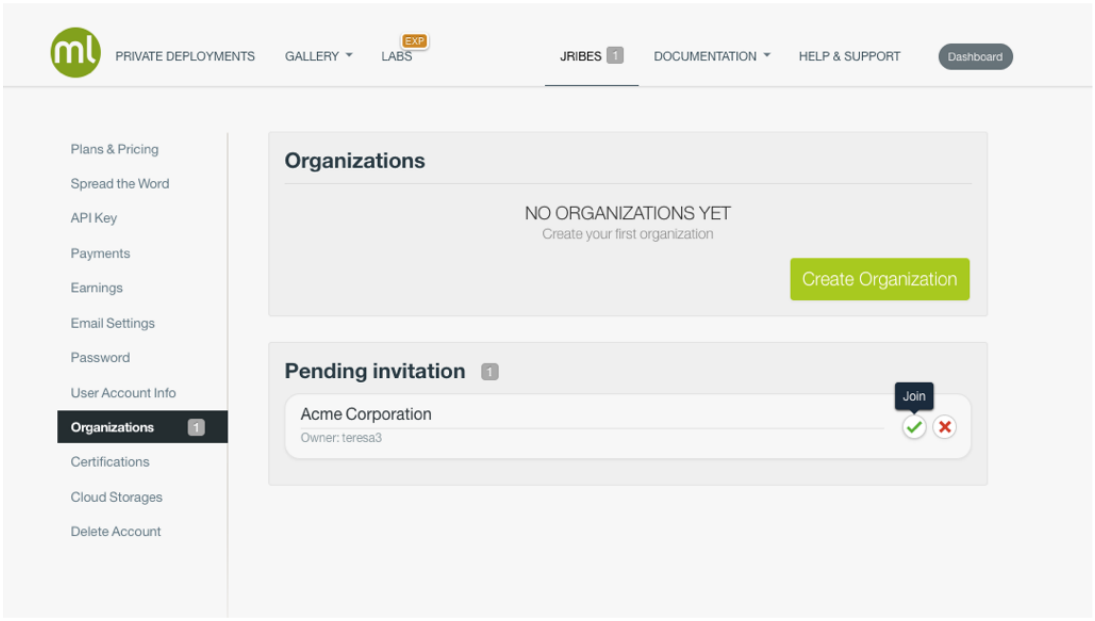

Figure 4.10: Notification in the invitee account

If the user name **does not exist**, you will see an **error** message like the one in the image below.

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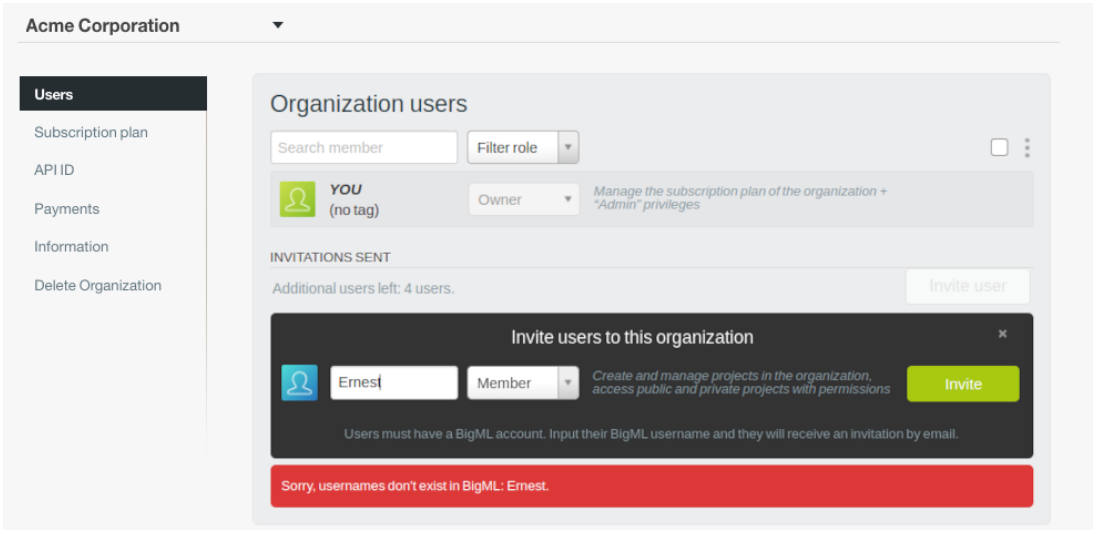

Figure 4.11: Wrong user name inserted

4. The user can accept or reject the invitation. If the user **accepts** the invitation, you will see the new user in the organization account (Figure 4.12).

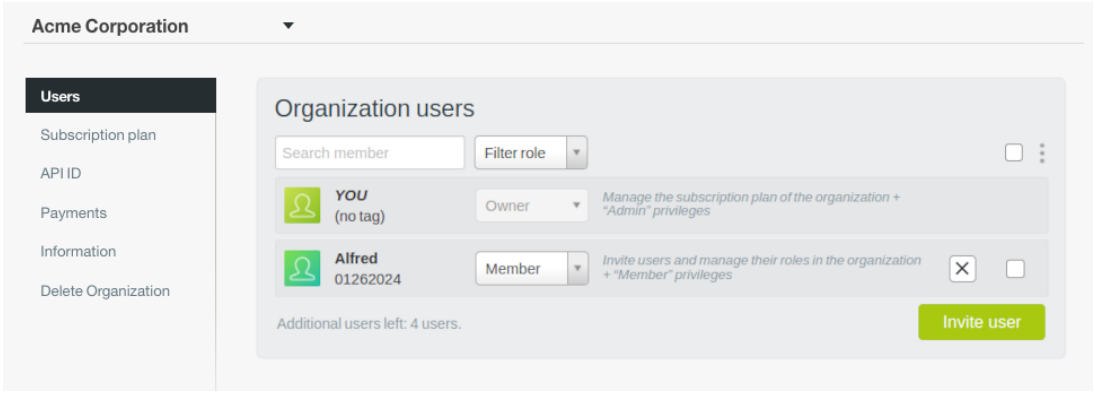

Figure 4.12: User accepts the invitation

If the user **rejects** the invitation, you will see a notification as the one shown in (Figure 4.13).

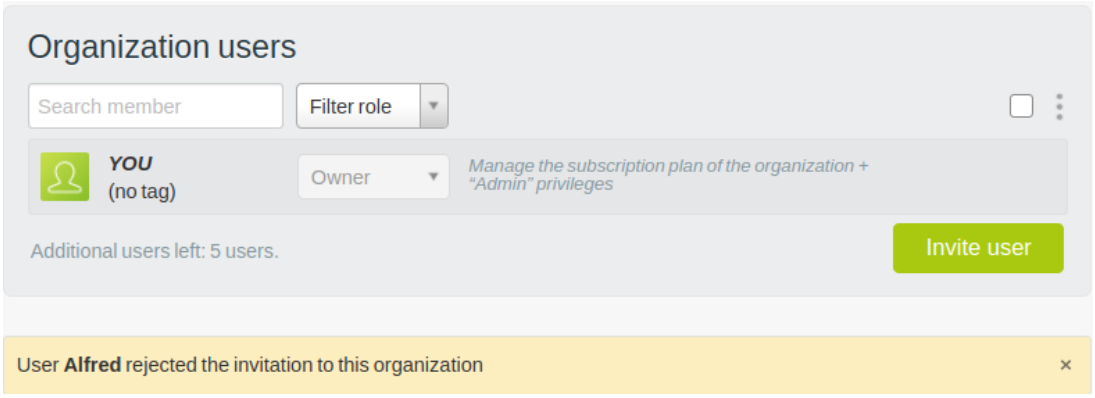

Figure 4.13: User rejects the invitation

When there are **no more invitations left**, the invitation button will be disabled as shown in Figure 4.14. If you want to invite more users, you will need to update your organization subscription plan first because

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each additional user has a cost associated (see Section 6.1). There is **no limit for the number of users** you can add to a given organization.

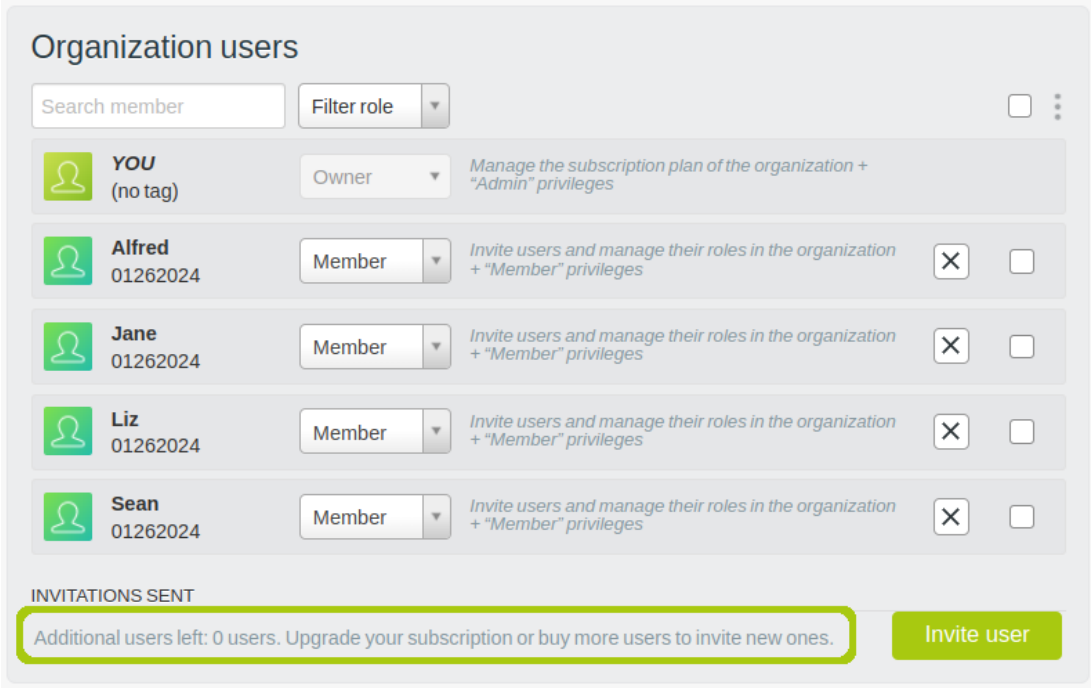

Figure 4.14: No user invitations left

4.1.2 Automated New Private Project Assignment

The Organization **owner** and **administrators** can decide to automatically assign a new private project to every user that joins the Organization. By activating the switch in Figure 4.15, all users that join the Organization will automatically get a private project. As a result, **Restricted members** will only be able to work in their own private project and public projects, while the rest of users will be able to create and delete additional projects freely.

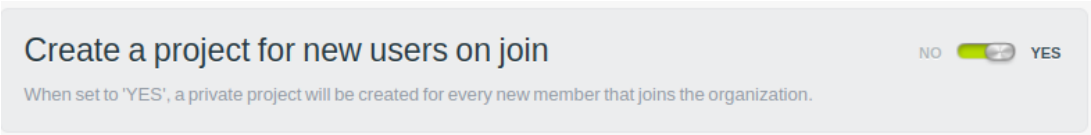

Figure 4.15: Activation of the automated new project creation when joining the Organization.

4.1.3 Self-Registration Invitation Links

The **owner** or the **admin** of an organization will find a panel in the Organization configuration view (https://bigml.com/organization/<OrganizationName>/users) with links that can be shared to invite members to the Organization.

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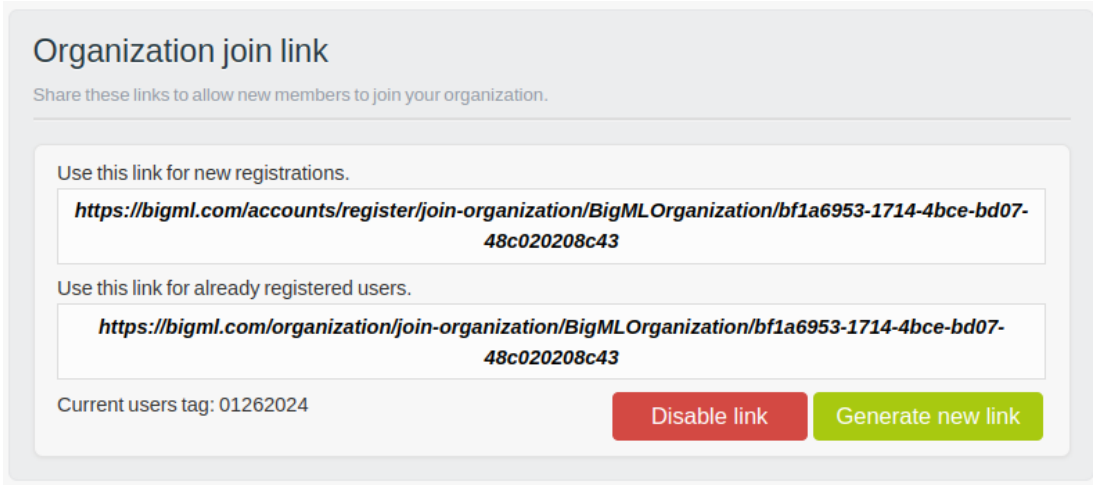

Figure 4.16: Organization invitation links

Older Organizations can present a previous panel allowing to activate those **invitation links**.

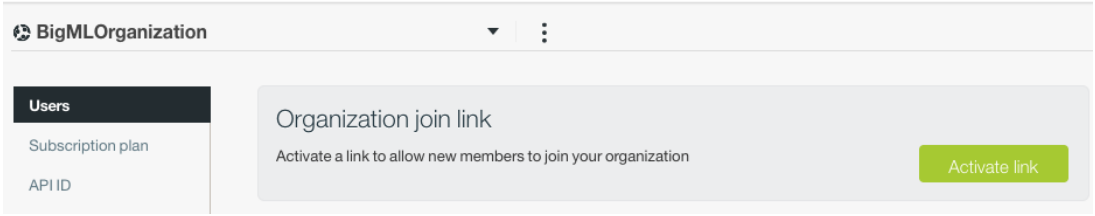

Figure 4.17: Organization invitation links activation panel

The self-registration links can be shared with **new** or **existing users** as required. Mind that each link serves one kind of scenario: **New users**, that need to register in **BigML** and join the Organization, and **existing users** already registered in BigML that only need to join the Organization.

Both can be disabled or regenerated anytime, and doing so will render any previous links useless. It will also change the associated **Current users tag**. The value of that tag is the date in which the links were generated, and will be associated to each user that enrols using the link.

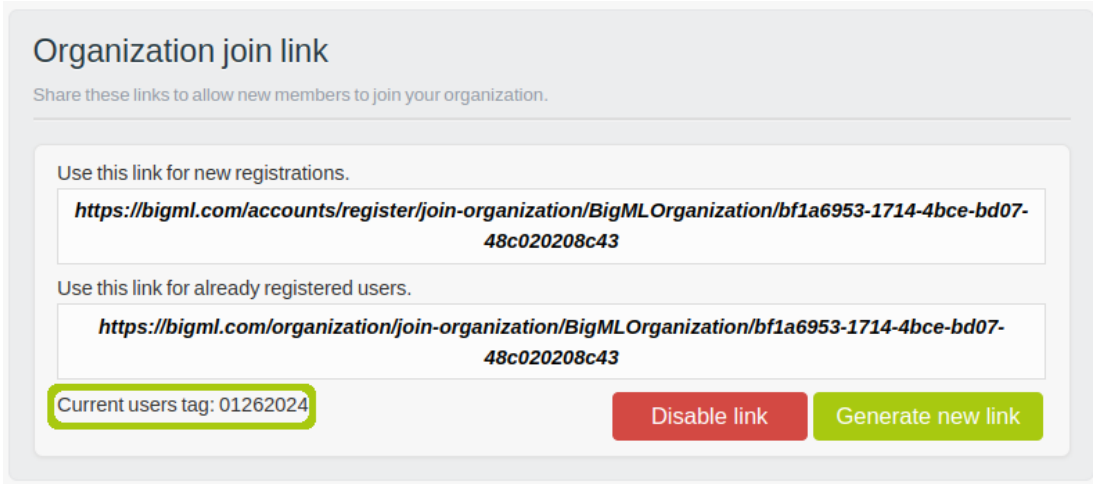

Figure 4.18: Self-registration tag information.

Users registering through the self-registration links will be automatically assigned a **Restricted member** profile (see Section 4.3).

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The self-registration process varies slightly depending on the link used. Following the first link, users will land in a customized registration form informing that the registration will include joining the Organization (see the blue block in Figure 4.19).

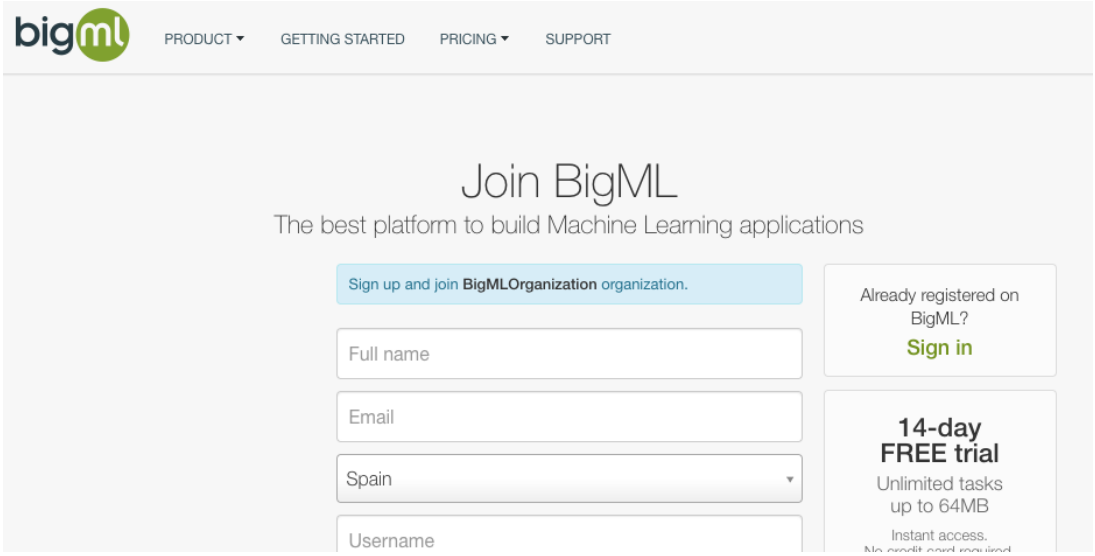

Figure 4.19: Organization invitation form

After filling in the usual name, email, country and credentials information and accepting BigML's Terms of Service, they will be enrolled in BigML and the Organization at once.

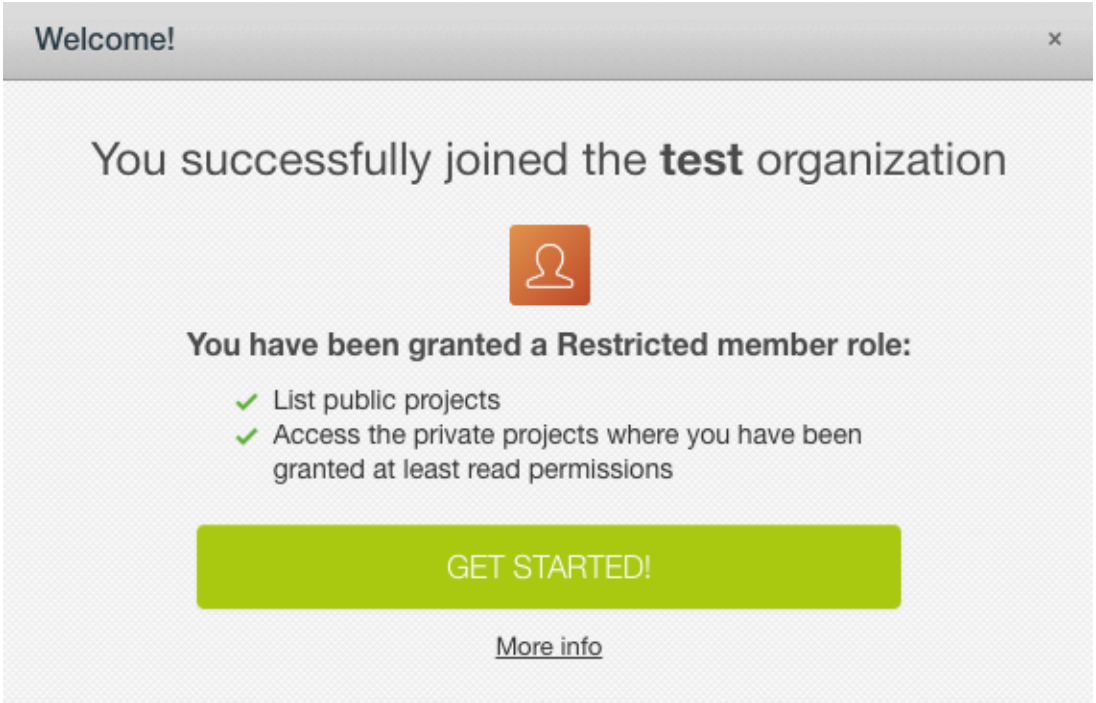

Figure 4.20: New Organization member welcoming message

At the same time, the **owner** of the Organization will be notified about the user having joined the Organization via email.

When using an invitation link, some special conditions might arise. The user will receive an error message if:

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1. The Organization does not exist anymore or is dormant.
2. No more users are allowed in the Organization.
3. The Organization Invitation link has changed or is no longer active.

Already registered users can use the second link. If already logged in, following the link will immediately enroll them in the Organization. If no logged in user is detected, the login form will be shown to allow the user to log in first.

4.2 Revoking the Invitation

When you invite a user (see Section 4.1), before the user accepts the invitation, you can revoke it by clicking on the delete (X) button (see Figure 4.21).

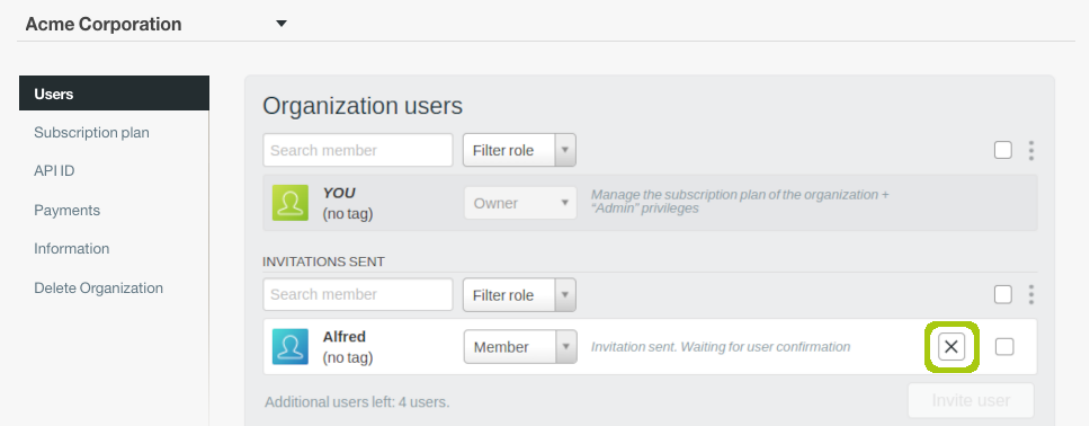

Figure 4.21: Revoke invitation

If you revoke an invitation, the user will be notified by e-mail and he or she will not longer see the invitation in the Dashboard.

4.3 Managing User Roles in the Organization

If you are the owner or the admin of the organization, you can change other user roles in the organization at any time. The roles define the user **actions in the organization**, basically, the **management** of the organization account and the ability to **create and access projects**.

There are four main roles in any organization: **owner**, **admin**, **member** and **restricted member**. See a detailed description of which actions can be perfomed by each role in **Table 2.1**.

To change a role for a given user, select the new role as shown in Figure 4.22.

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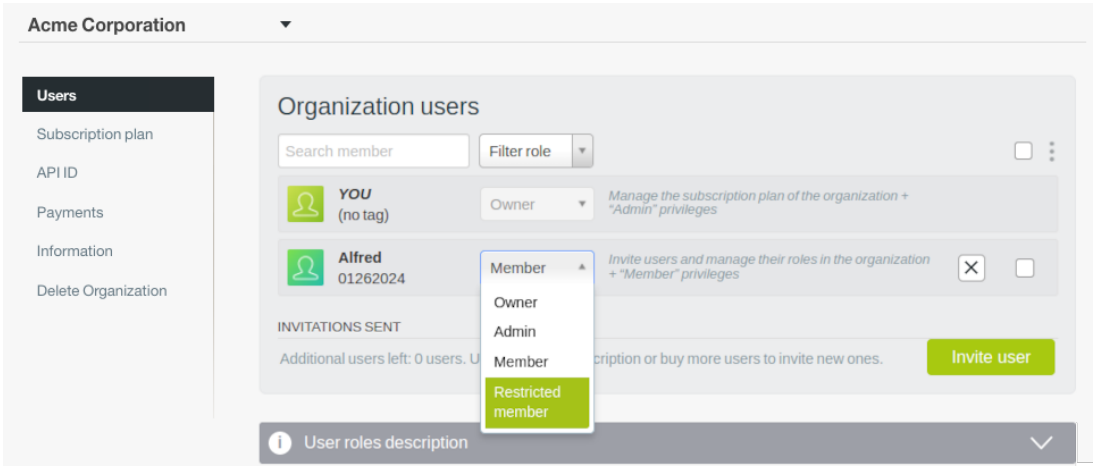

Figure 4.22: Change user roles in the organization

A modal window will appear asking you for confirmation. When you confirm it, the user will be notified by e-mail.

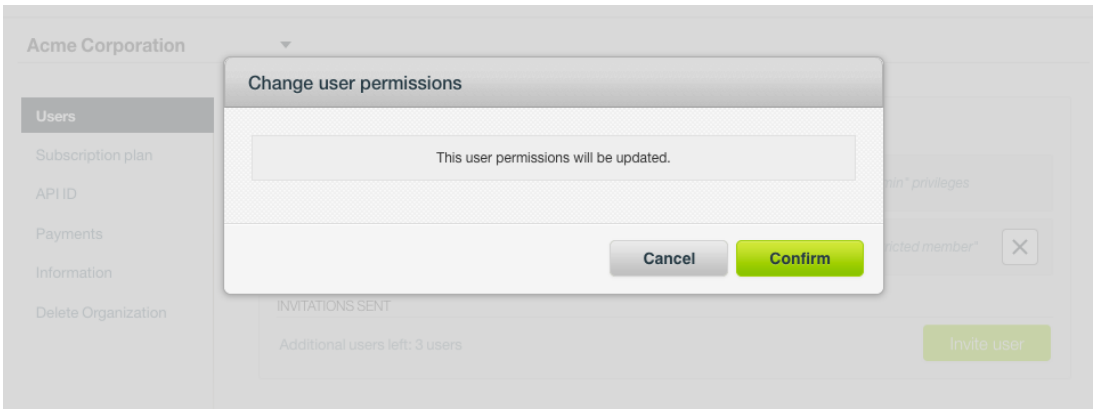

Figure 4.23: Confirm user roles change

The only user whose role cannot be edited is the **owner**, as the organization needs an owner. The owner is the creator of the organization by default. The owner can transfer ownership to another user in the organization by selecting the owner role for another user. The former owner will be automatically assigned an **admin** role.

4.4 Removing Users From the Organization

The users with **owner** and **admin** roles can **remove** other users from the organization. The owner of the organization is the only user that cannot be removed.

To remove a user from the organization, click on the delete (X) button as shown in Figure 4.24.

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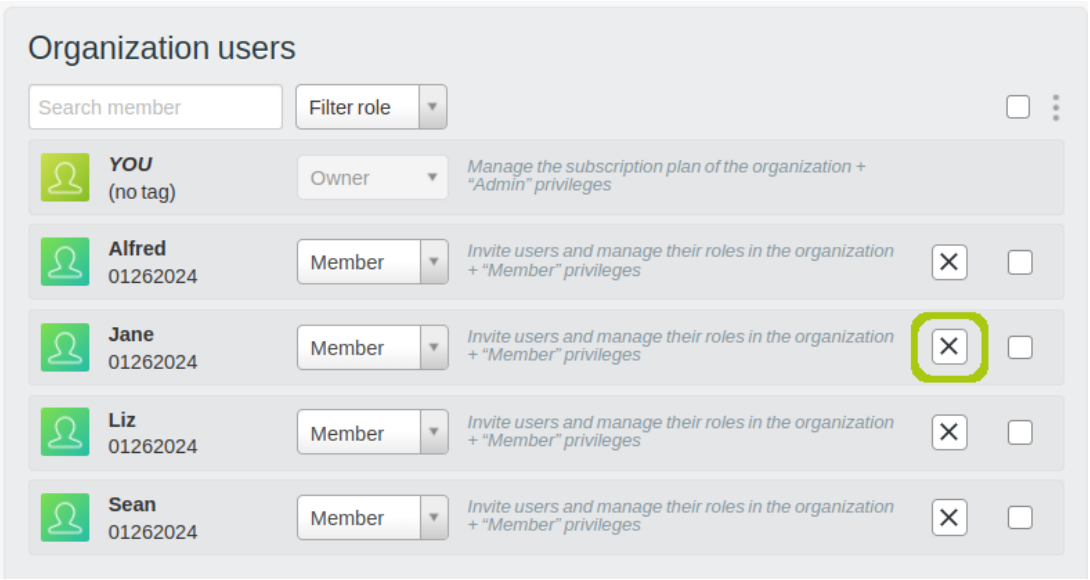

Figure 4.24: Remove user from organization

A modal window to confirm the removal will appear as shown in Figure 4.25. The user will receive a notification e-mail about their removal from the organization.

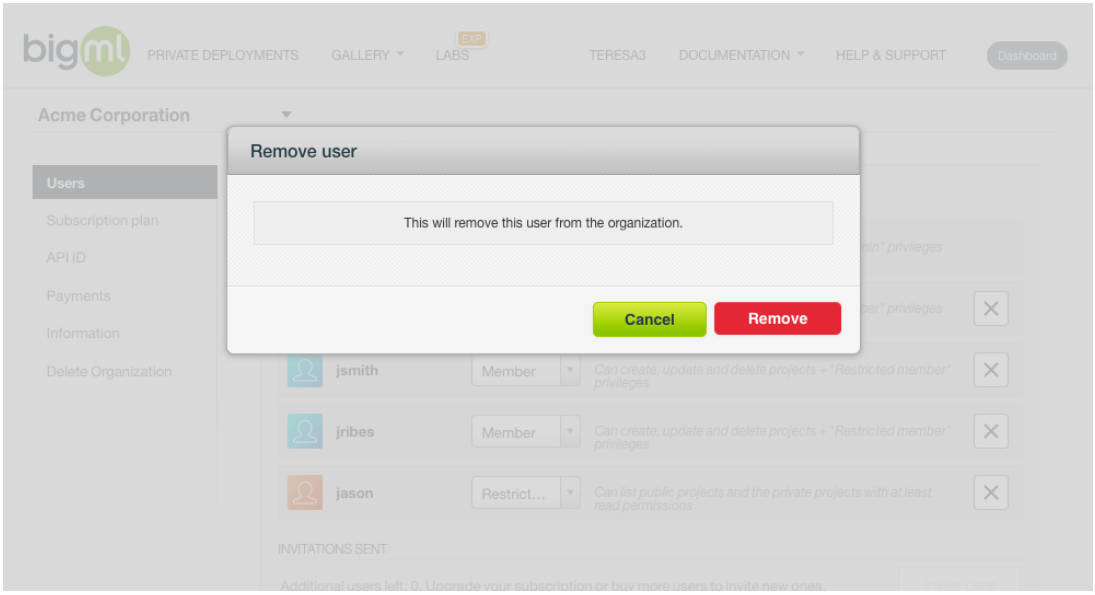

Figure 4.25: Confirm user removal from the organization

Since all the **resources** created in the organization **belong to the organization**, removing a user will not affect the accessibility of the resources created by this user. The resources will still be available in their corresponding projects in the organization. The same logic applies if a **user deletes his personal account**.

4.5 Batch Users Management

Besides the filter by type of membership, a search option by name or tag is available. The Organization **owner** and its **administrators** will be able to separate the Organization members in batches by regenerating the links (plus the associated tag) every time a new self-registration period starts. Batch operations, like removing users from the Organization or changing their role, can then be applied only to

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users that share a particular tag. This feature becomes especially helpful when batches of users need to be enrolled and removed at different points in time but should coexists for a while in the Organization.

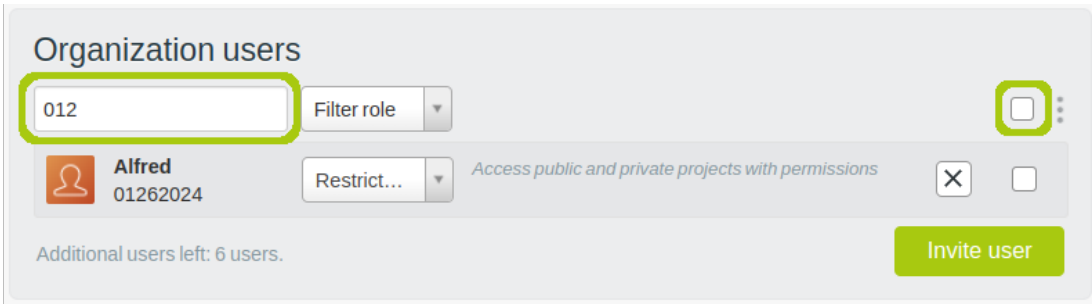

Figure 4.26: Search for users which share a particular tag and batch selection option.

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CHAPTER 5

Creating Projects

Owners, **admins**, and **members** can create projects in the organization. **Restricted members** cannot create projects in the organization, but **Owners** and **admins** can decide that a private project is created for each member when joining the Organization (see Subsection 4.1.2). For a detailed explanation of the different roles see Table 2.1. There is a limit of 1,000 projects per organization.

To create a new project, you can use the ADD NEW PROJECT option from the project list view menu (Figure 5.1).

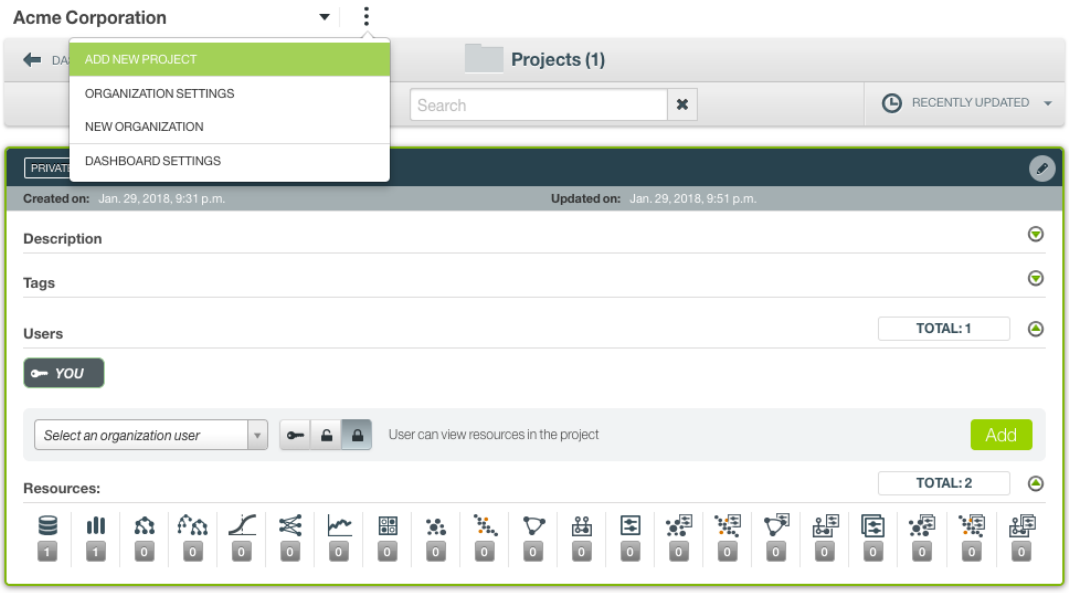

Figure 5.1: Add new project from the projects list view

Alternatively, use the ADD NEW PROJECT menu option from the Dashboard (Figure 5.2).

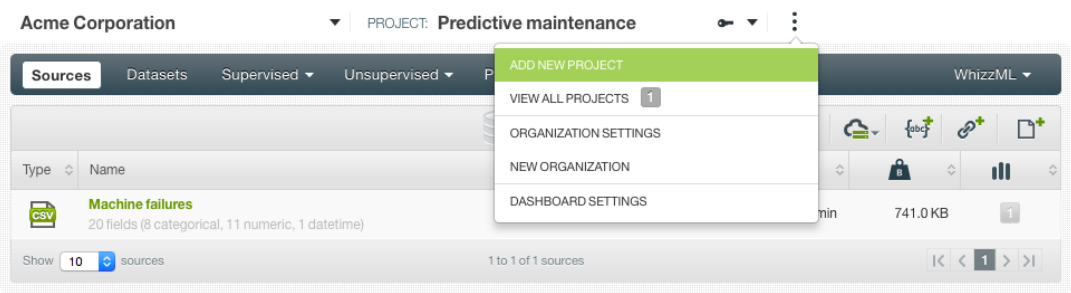

Figure 5.2: Add new project from the Dashboard

A new modal window will be displayed (Figure 5.3) so you can set the **project name**, the project **privacy** settings (see Section 5.1), and optionally the project tags and description Section 5.3.

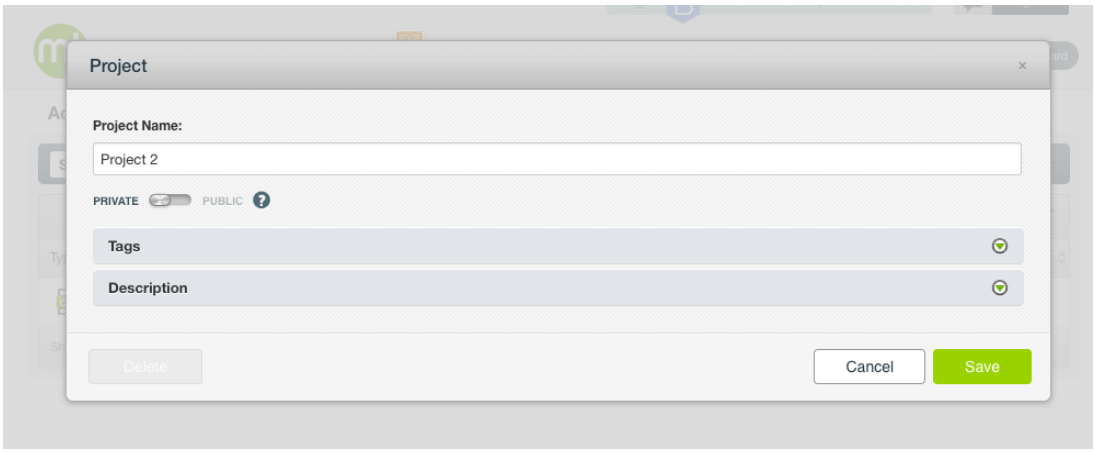

Figure 5.3: Set the project name

When the project is created, you can invite other users (see Subsection 5.2.1).

In the case of **restricted members** that cannot create projects, the message in Figure 5.4 will appear if they try to access an organization Dashboard where there are no projects.

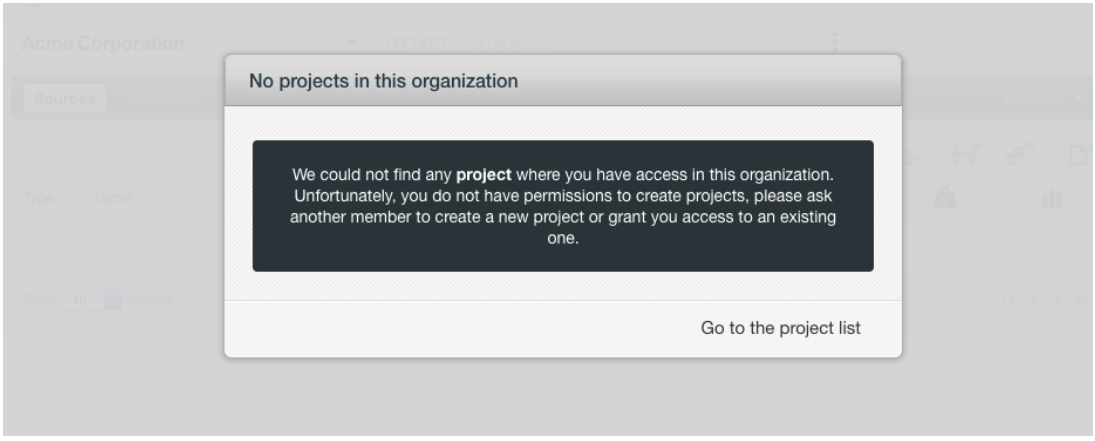

Figure 5.4: Message for restricted members when there are no projects in the organization

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5.1 Public Versus Private Projects

When creating a project, you can decide if it is **public** or **private** by clicking on the switch highlighted in Figure 5.5.

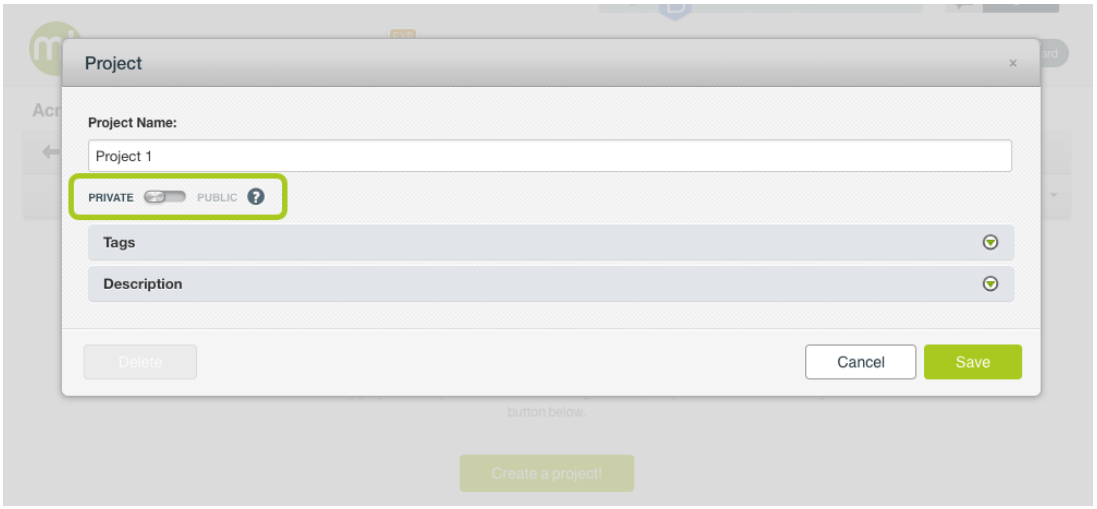

Figure 5.5: Create a private or public project

If your project is **public**, all users in the organization will have access to it with write permissions. If your project is **private**, only the members and restricted members with at least read permissions will be able to access it (although the owner and the admin in the organization will have full access). Furthermore, you can set different levels of permissions for users in private projects. See a summary of the differences between public and private projects in the **Table 5.1** below.

	Public	Private
Visibility	All users in the organization can access projects.	The owner and admins have full access, but members and restricted members need to have at least read permissions to access projects.
User permissions	Non-editable. Admin permissions (for the creator) and write permissions (for the rest of users).	Editable. Admin, write, and read permissions.

Table 5.1: Project privacy settings

If you have **admin** permissions for a given project, you will be able to change the type of an existing project by clicking on the edition icon next to the project name (see Figure 5.6).

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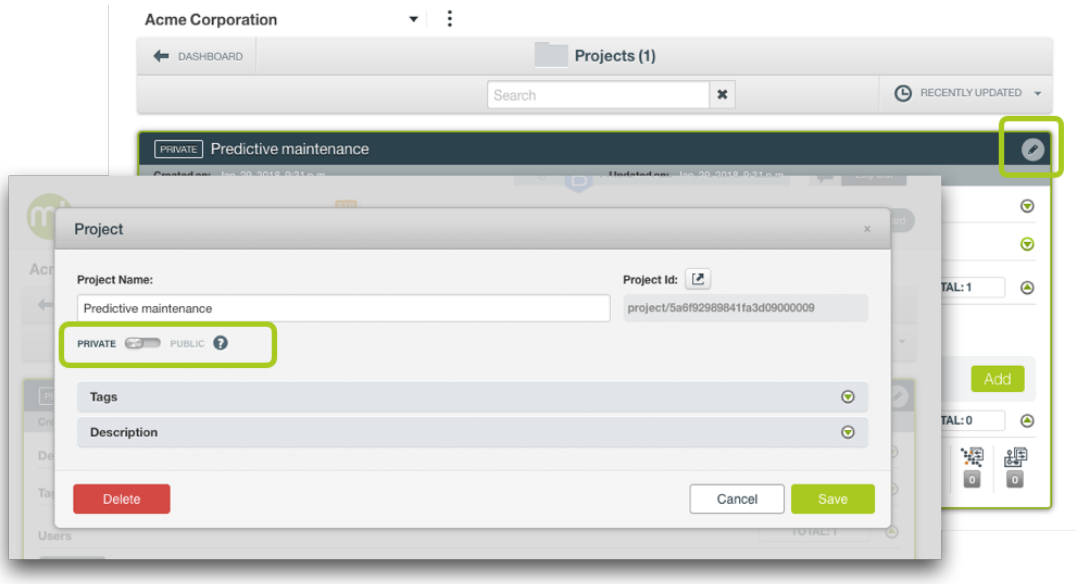

Figure 5.6: Change from public to private projects and vice versa

If the project changes **from public to private**, all the users with previous access to the project will be removed and you will need to invite the users you want to the project. If the project changes **from private to public**, all the organization users will have access to the project with write permissions. Users will be notified about these changes in their Dashboards.

5.2 Managing Users in a Private Project

If you have **admin** permissions in a **private project**, you can invite users from the organization to collaborate on the project (Subsection 5.2.1), edit their permissions (Subsection 5.2.2), and remove them from the project (Subsection 5.2.3).

Note: you cannot manage users in public projects, since all users in the organization will have non-editable write permissions.

5.2.1 Inviting Users to a Private Project

You can **invite users** within the **organization** to collaborate on private projects. You cannot invite an external user to a project; the user needs to belong to the organization first.

1. If you have **admin** permissions in a private project, you can invite other users. Select a user from the organization as shown in Figure 5.7.

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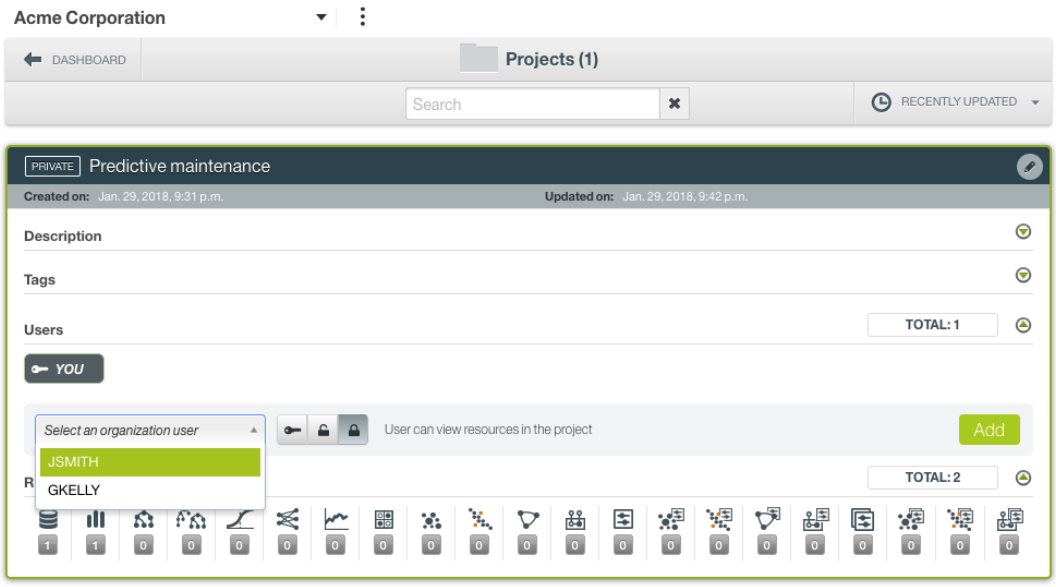

Figure 5.7: Select the user to invite to the project

2. Then select the permission you want to set for the new user choosing one of the three options shown in Figure 5.8 (see a detailed description of the different user permissions in Table 2.2) and click on the Add button.

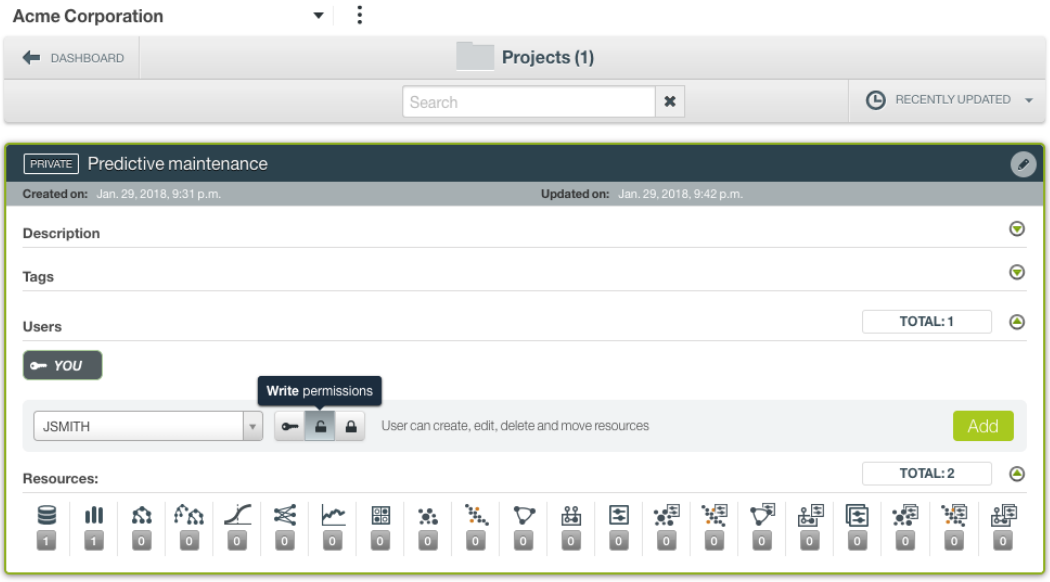

Figure 5.8: Select the user permissions in the project

3. Finally, you will see the user in the list of users for that project (see Figure 5.9).

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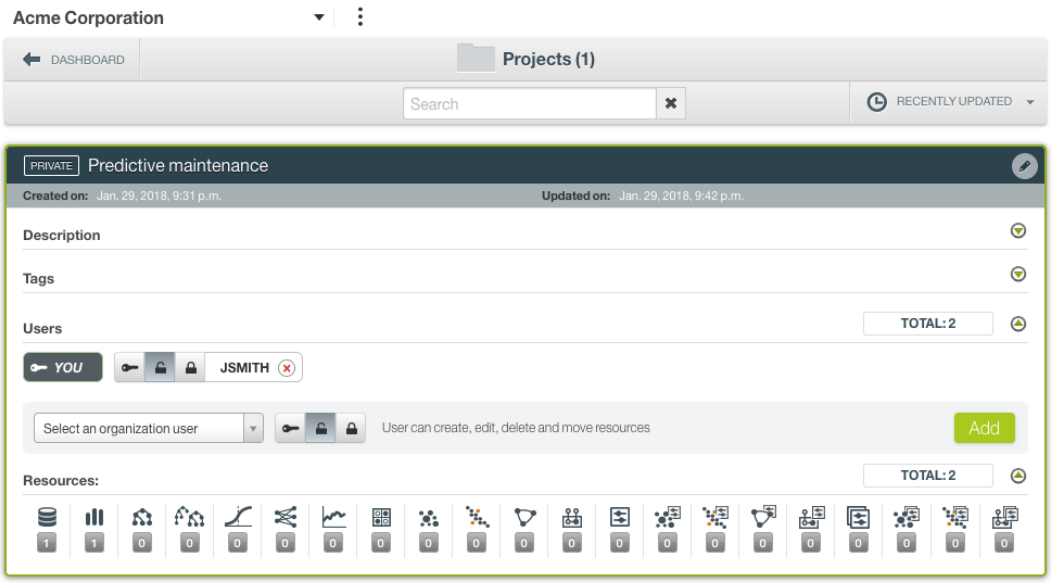

Figure 5.9: See the invitee in the user list of the project

The invitee will receive a notification e-mail and the project will also appear in his or her organization Dashboard. If there are **no more users** to invite **in the organization**, the option to add more users to the project will be disabled.

5.2.2 Managing User Permissions in a Private Project

As the **admin** of a private project, you can set different **permissions per user**. The levels of permissions define the **user actions in the projects**, basically, the project metadata, the users in the project, and the access to the project resources. There are three different levels of permissions: **admin** permissions, **write** permissions, and **read** permissions. All the actions per each level are detailed in Table 2.2.

You can change the permissions of a given user in a project by clicking on the corresponding option to the left of the user name (see Figure 5.10).

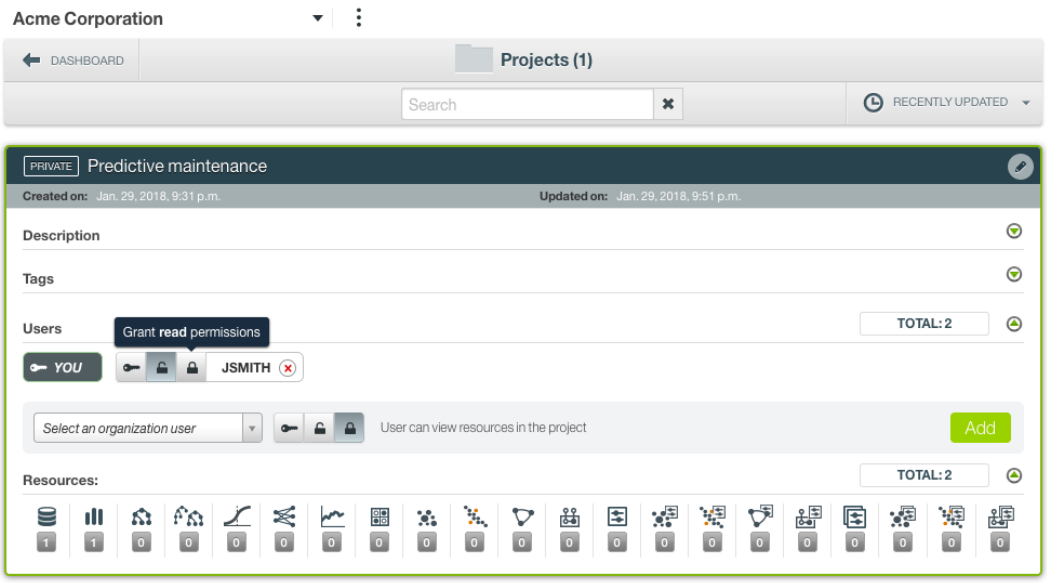

Figure 5.10: Change user permissions in a project

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5.2.3 Removing Users From a Private Project

If you have **admin** permissions for a private project, you can remove users by clicking on the option shown in Figure 5.11.

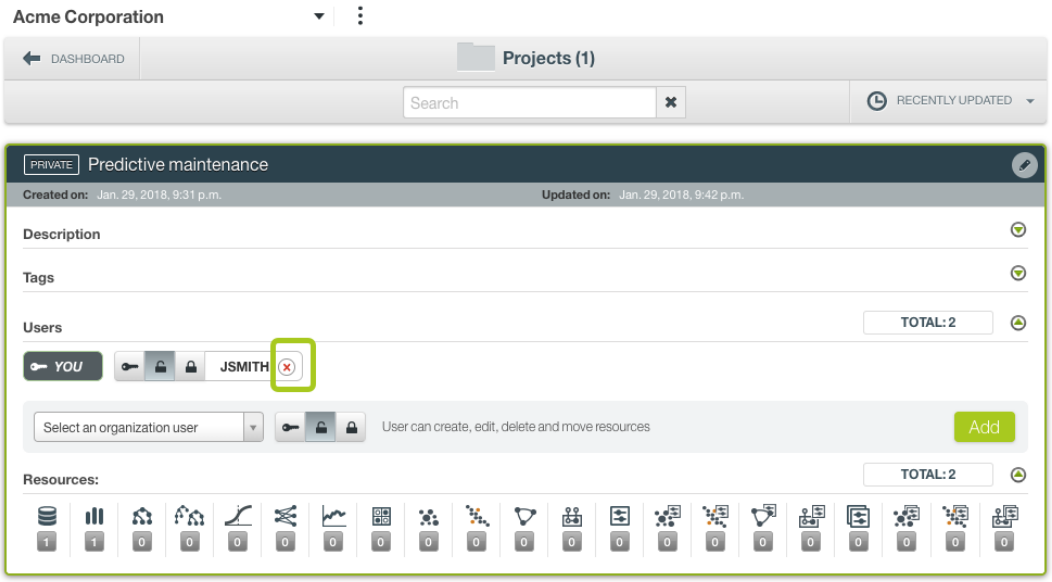

Figure 5.11: Remove users from projects

The user will receive a notification e-mail about their removal.

Note: when you remove a user from a project, all the resources created by this user will remain in the project.

5.3 Descriptive Information

Each project has an associated **name**, **description**, and **tags**. A brief description follows for each concept.

If you have **admin permissions** for a project, you will be able to see an icon to edit the project descriptive information as shown in Figure 5.12.

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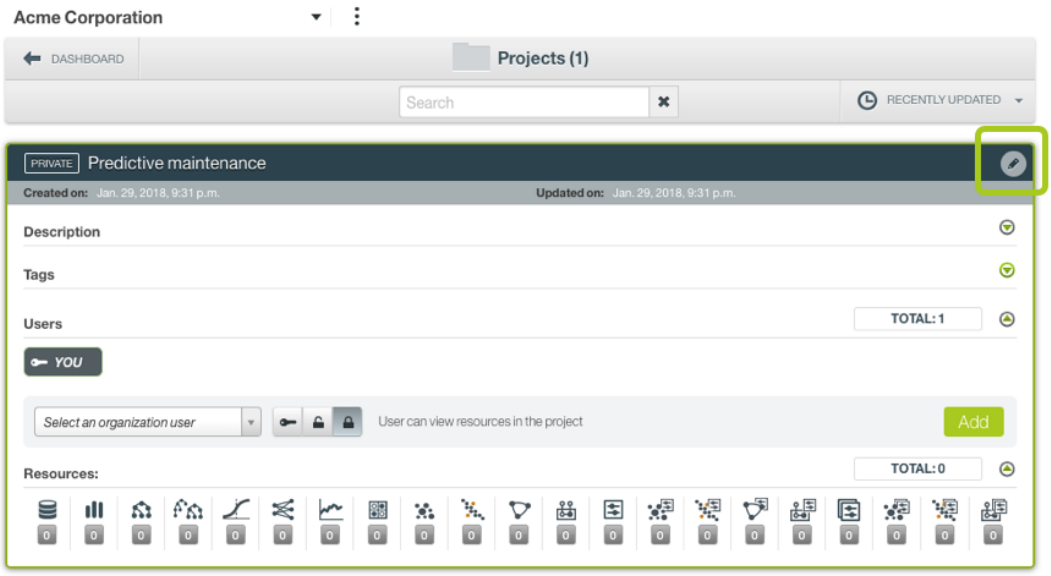

Figure 5.12: Edit projects

5.3.1 Project Name

Each project needs a **name** (see Figure 5.13) that is displayed in the project list view and also in the selector next to the organization name in the Dashboard. Project names are indexed to be used in searches.

The name of a project cannot be longer than **90** characters. There is no restriction on the characters that can be used in a project display name. More than one project can have the same name, but they will always have different identifiers.

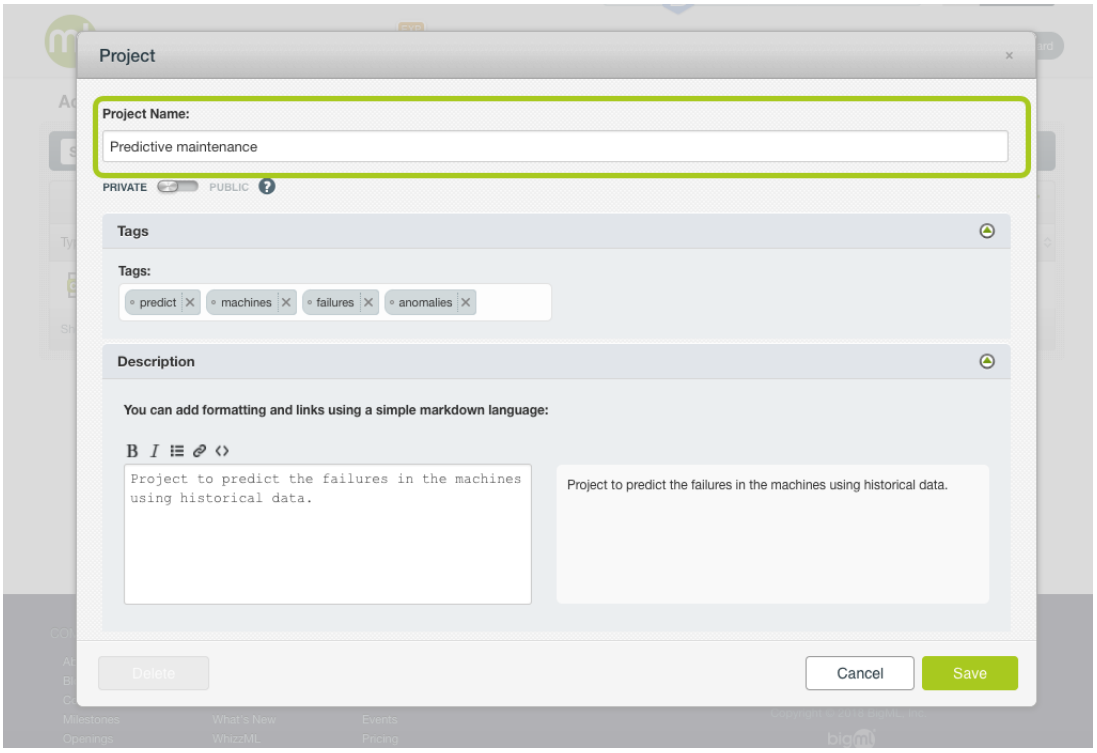

Figure 5.13: Project name

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5.3.2 Project Description

Each project also has a description that is useful for documenting your Machine Learning tasks. Descriptions can be written using plain text and also markdown[1]. BigML provides a simple markdown editor that accepts a subset of markdown syntax. (See Figure 5.14.)

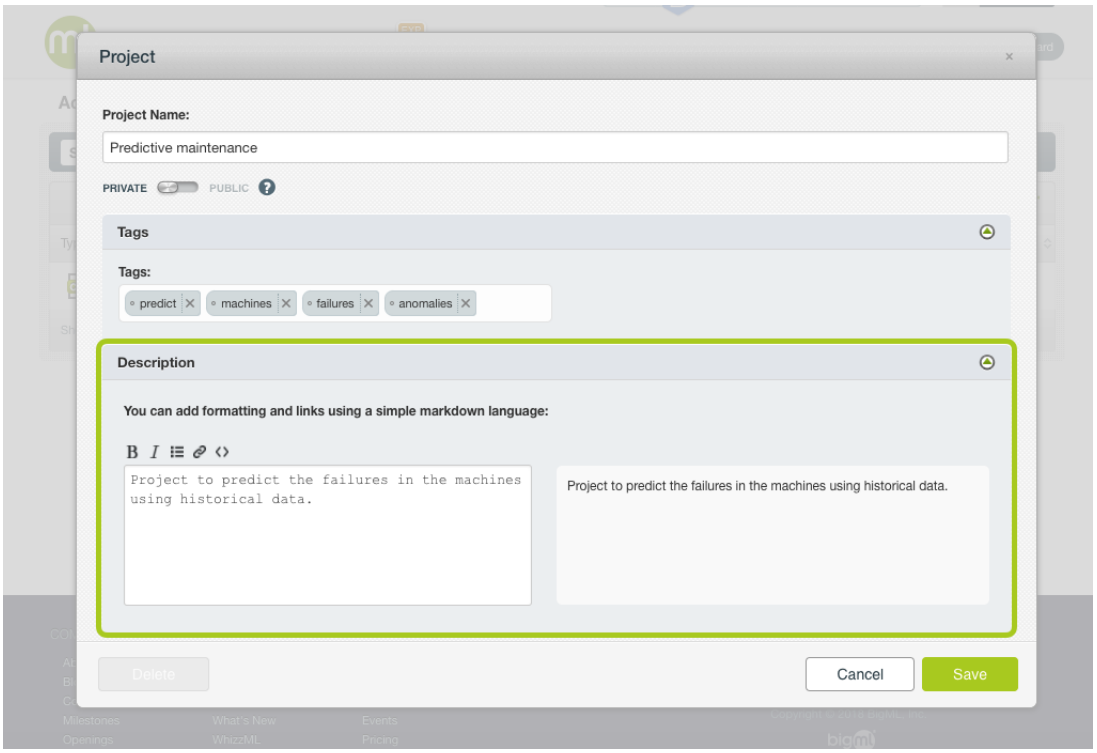

Figure 5.14: Project name

Descriptions cannot be longer than **8192** characters and can use any character.

5.3.3 Tags

A project can also have a number of **tags** associated with it that can provide some extra information (see Figure 5.15). Tags are also very helpful to search for a project in the project list using the keywords "tags:" followed by the tag you want to search for.

Each tag is limited to a maximum of **128** characters. Each project can have up to **32** different tags.

[1] https://en.wikipedia.org/wiki/Markdown

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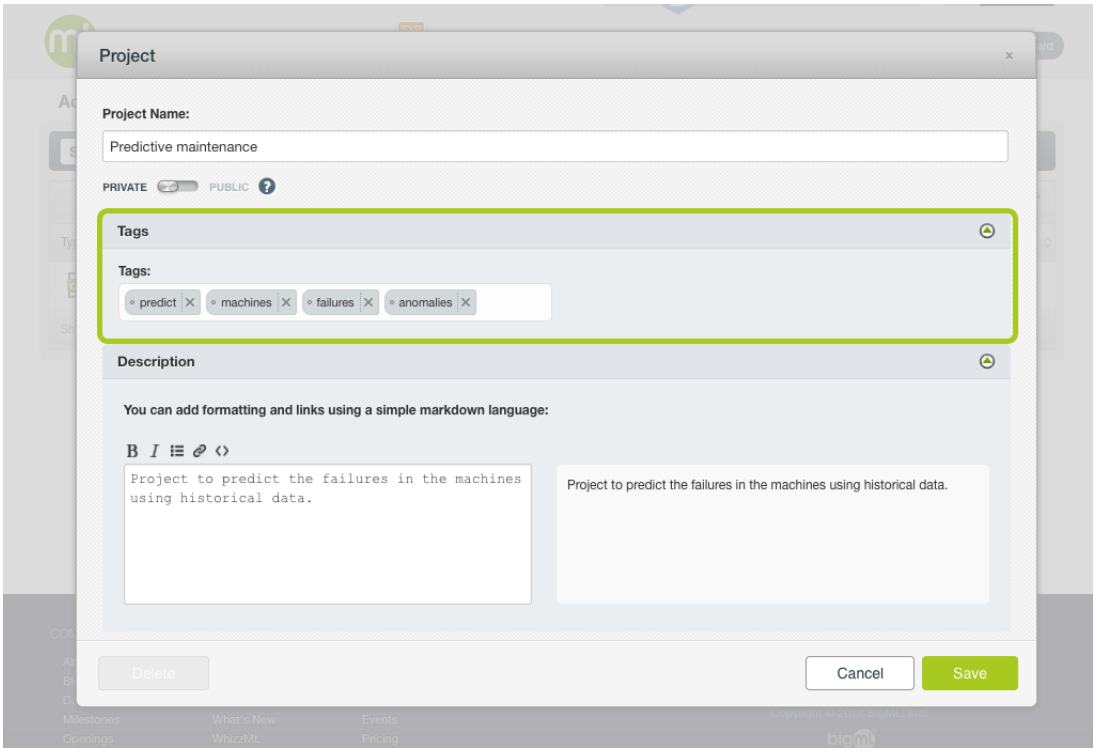

Figure 5.15: Project tags

5.4 Creating Resources Within Projects

The creation of any BigML resource such as sources, datasets, supervised and unsupervised learning models, and WhizzML scripts and executions, works exactly the same in the organization Dashboard as in your personal Dashboard. The main difference is that **resources must belong to a project** in the organization. The main reason for this is that permissions are assigned by project, not by resource.

Anyone in the organization can create resources in a **public project**, however, only the owner, admin and other users with at least write permissions can create resources in a **private project**.

You can see who creates each resource in an organization. The creator information can be seen in the top left corner of the resource view (see Figure 5.16) as well as in the resource INFO PANEL in the Details section (see Figure 5.17).

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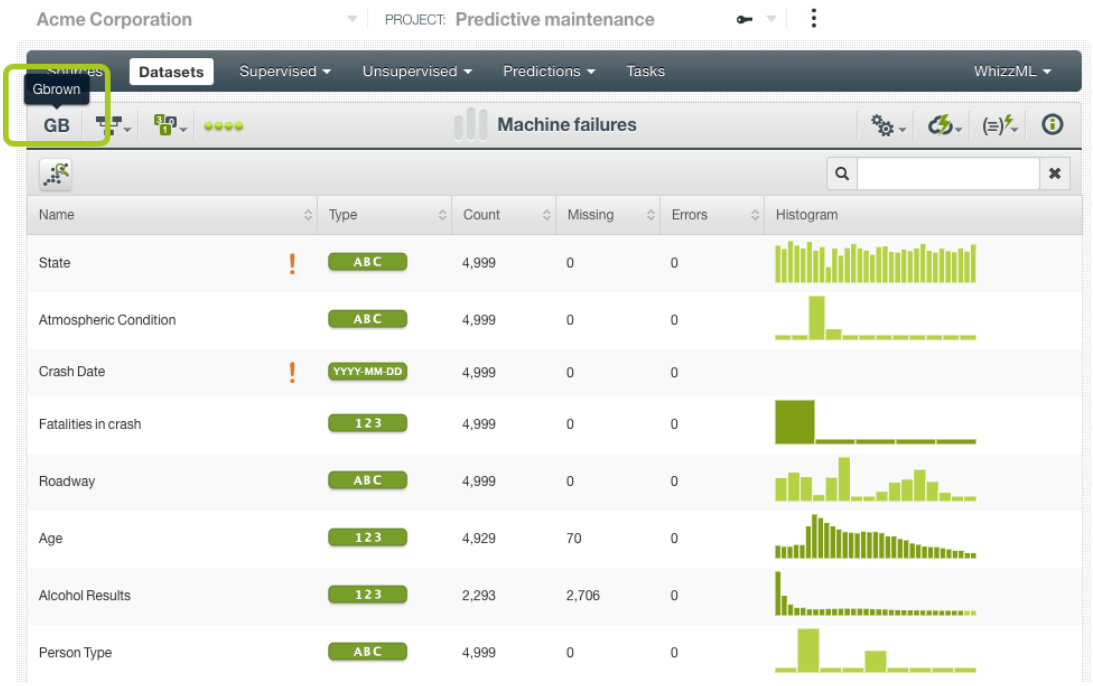

Figure 5.16: See the creator of the resource in the resource view

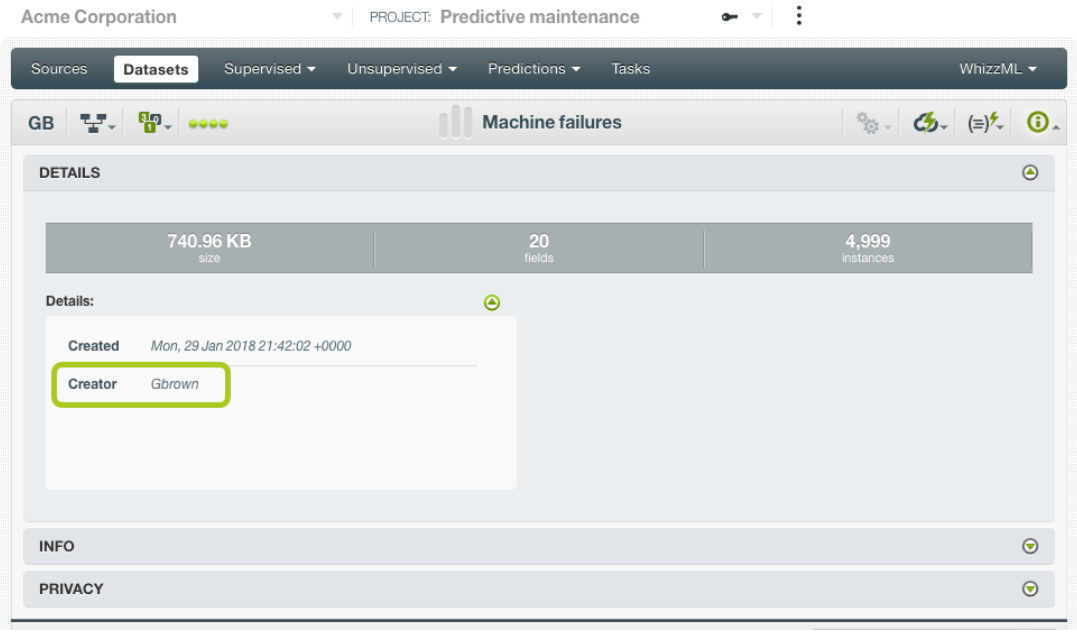

Figure 5.17: See the creator of the resource in the info panel

Although resources have a creator, the resources will always **belong** to the **organization**. If a user is removed from the organization (Section 4.4) or a user deletes their personal account, all the resources created by that user will still be available from the organization account.

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CHAPTER 6

Managing the Organization Account

Only the **owner** can manage the organization account. If you are the owner, you can access the organization account from the project list view by clicking the ORGANIZATION SETTINGS menu option as shown in Figure 6.1.

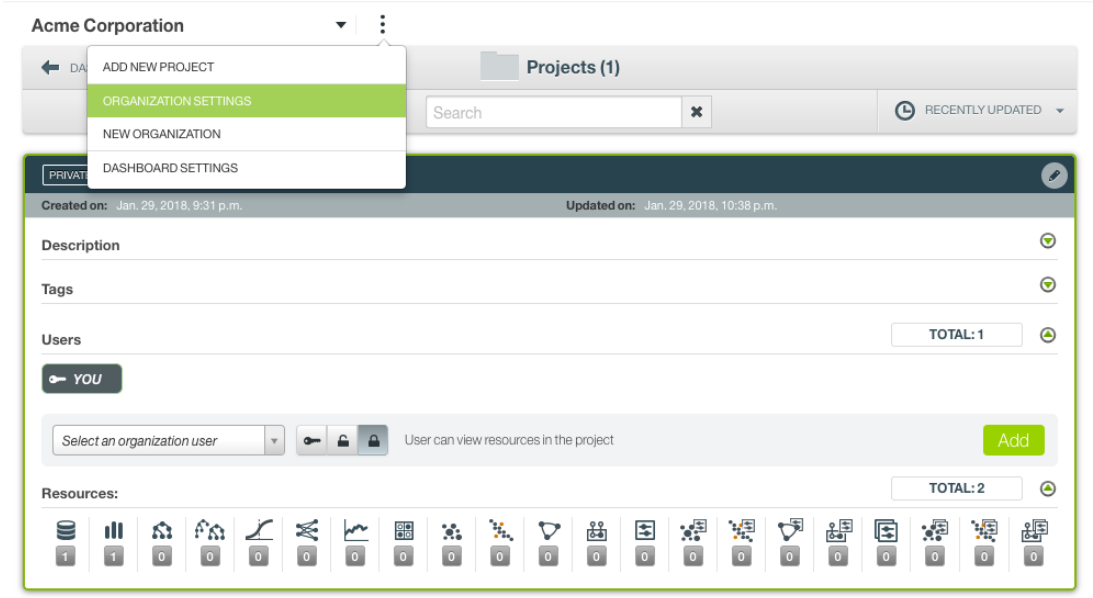

Figure 6.1: Access the organization settings from the project list view

You can also find the same ORGANIZATION SETTINGS option from the Dashboard (Figure 6.2)

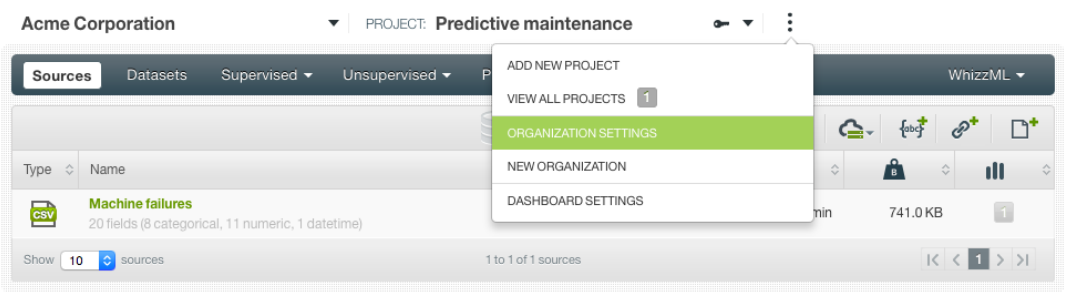

Figure 6.2: Access the organization settings from the Dashboard

Alternatively, from your **personal account**, click the **Manage organization** icon next to the organization name in the **Organizations** section. (See Figure 6.3.)

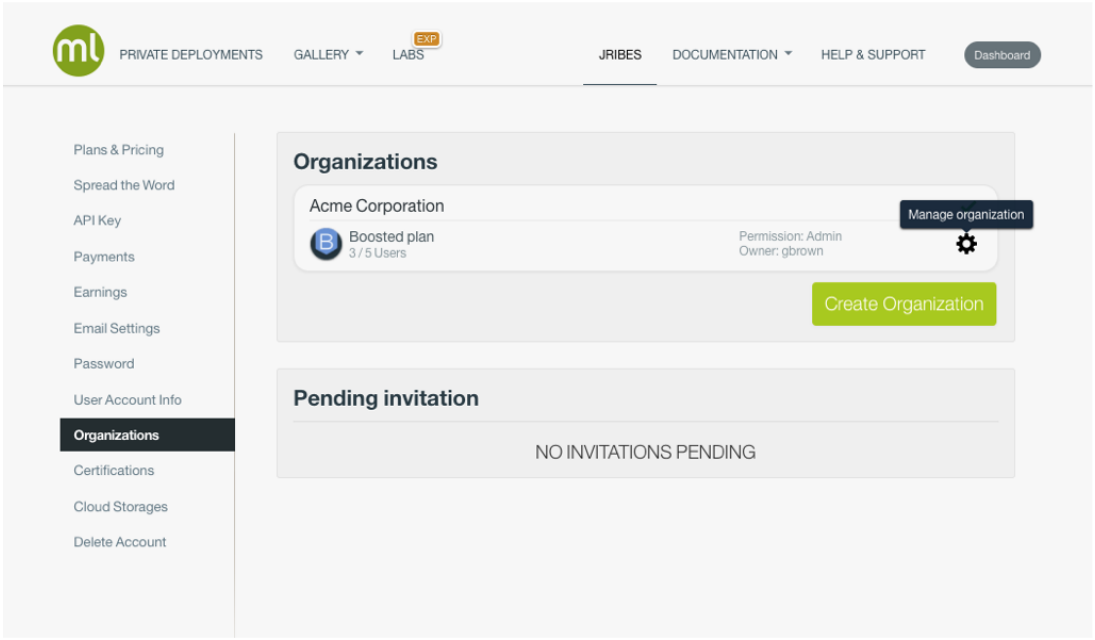

Figure 6.3: Manage your organization from your account

From the organization account, you can manage the **subscription** of the organization (see Section 6.1), view the API ID (Section 6.2), the organization **payments** (Section 6.3), edit the organization **profile** (see Section 6.4), and **delete** the organization (see Section 6.5).

6.1 Updating the Organization Subscription

The **owner** can manage the organization subscription to **upgrade or downgrade** the subscription plan, as well as to **add or remove users** from the organization.

To update your subscription, you need to go to the **Subscription plan** section in your organization account and follow these steps:

1. Click on the Change plan button.

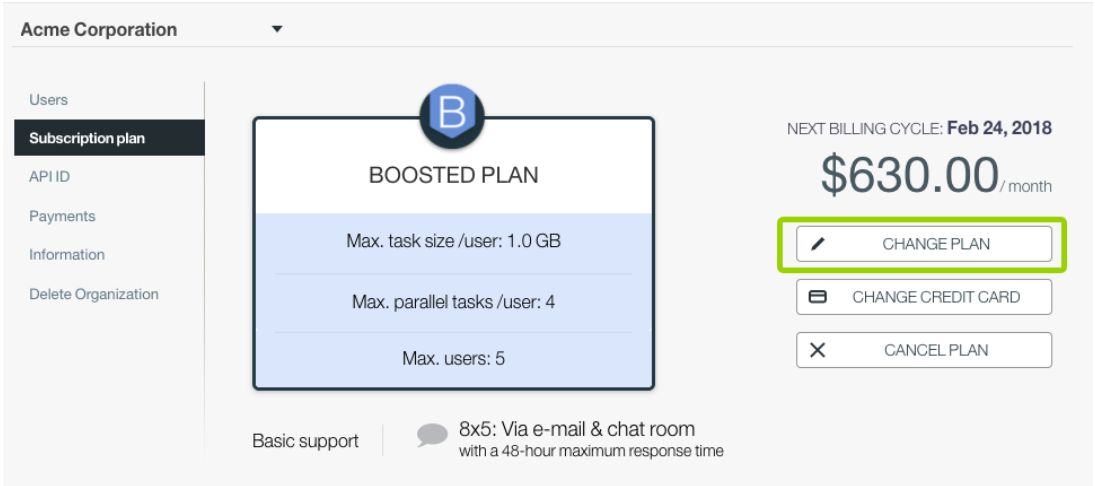

Figure 6.4: Change organization subscription plan

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2. In the subscription plan page, choose the new plan using the slider and/or change the desired number of users. Then click Update.

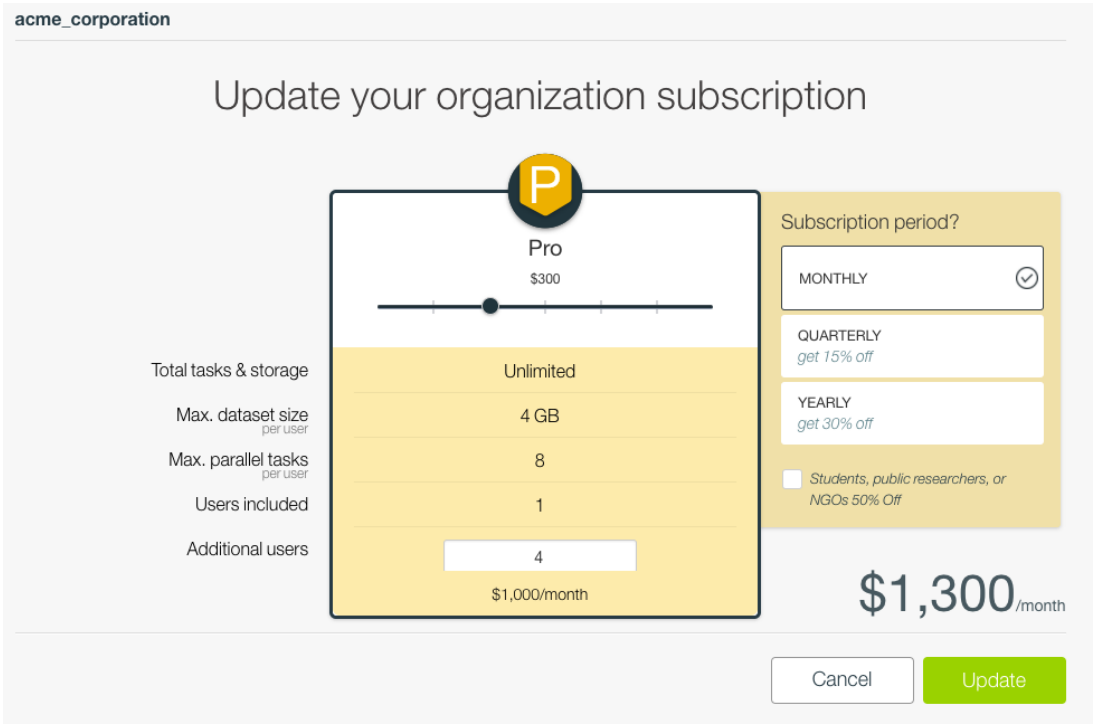

Figure 6.5: Select the new subscription plan

3. A confirmation message with all the information of the previous and the new plan will appear. If you agree with the new conditions, click the Update button.

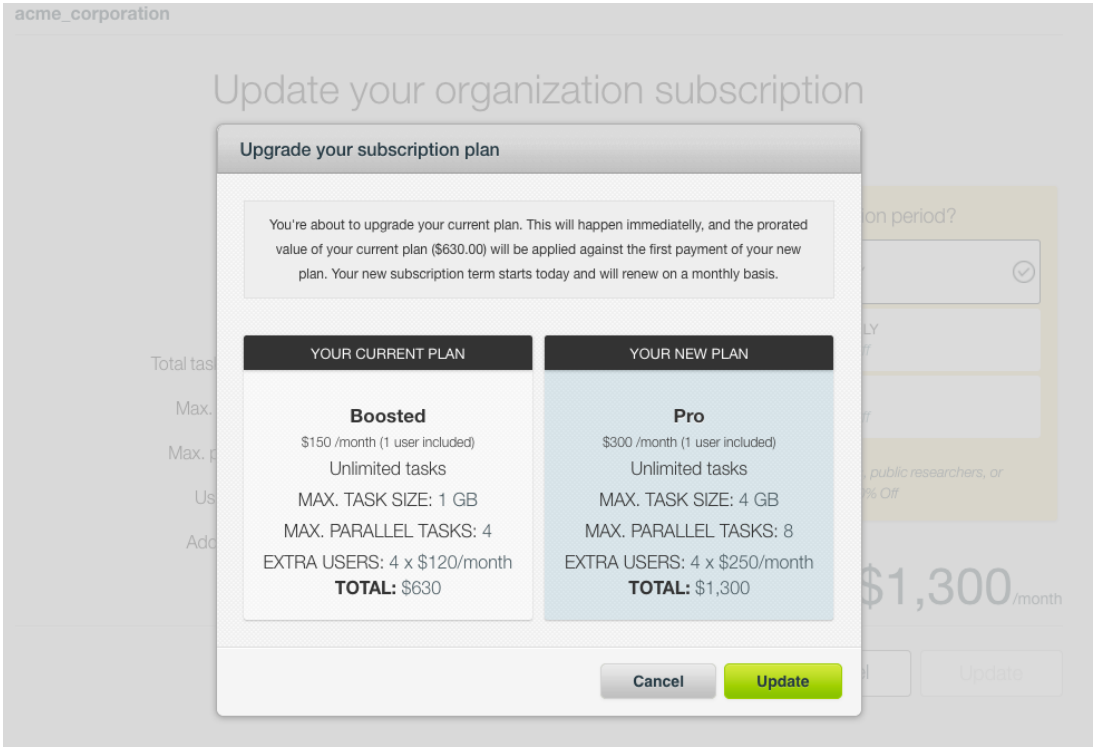

Figure 6.6: Compare the current plan and the new plan and confirm the change

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Note: the new plan will be billed to the bank card linked to the organization account (see Section 6.3), not to your personal account card.

If the **new plan is more expensive** than your current plan, the new plan will take immediate effect. For the **first period** of your new plan, BigML will charge you the **difference** between the **new plan price** and the **prorated value** of the previous plan that you did not use. For example, imagine you bought a Boosted plan with 4 additional users for a total price of **$630/month** on the 1st of January. On the 15th of January, you upgrade your subscription to a PRO plan with the same number of users for a total price of **$1,300/month**. BigML will charge you ($1,300 - 0.5x$6309) = **$985** instead of the $1,300 for the first month of your new PRO plan. You will be able to see the new plan details in your account.

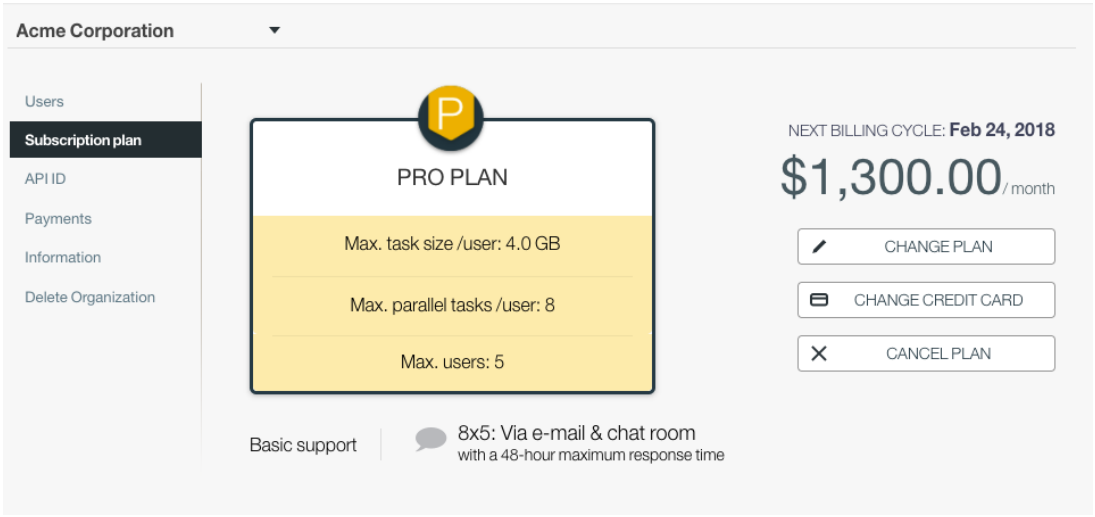

Figure 6.7: Upgrade subscription

On the other hand, if the **new plan is cheaper** than your current plan, the new plan will take effect when the **current plan billing period ends**. You will find your current plan details in your account and a side note that informs the **new plan** when the next billing cycle starts.

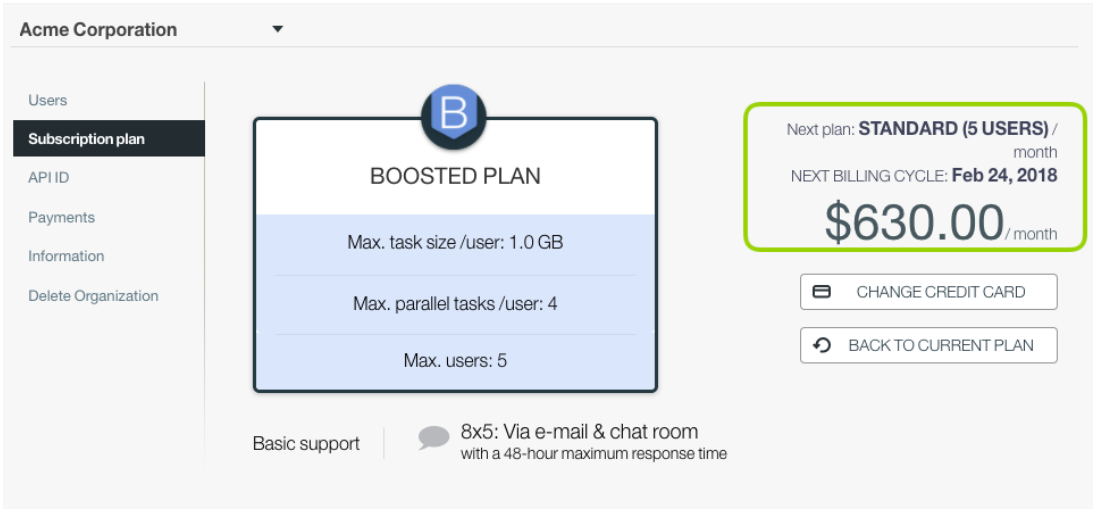

Figure 6.8: Downgrade subscription

You can always **cancel the new plan** and reset the current one by clicking on the option Back to current plan.

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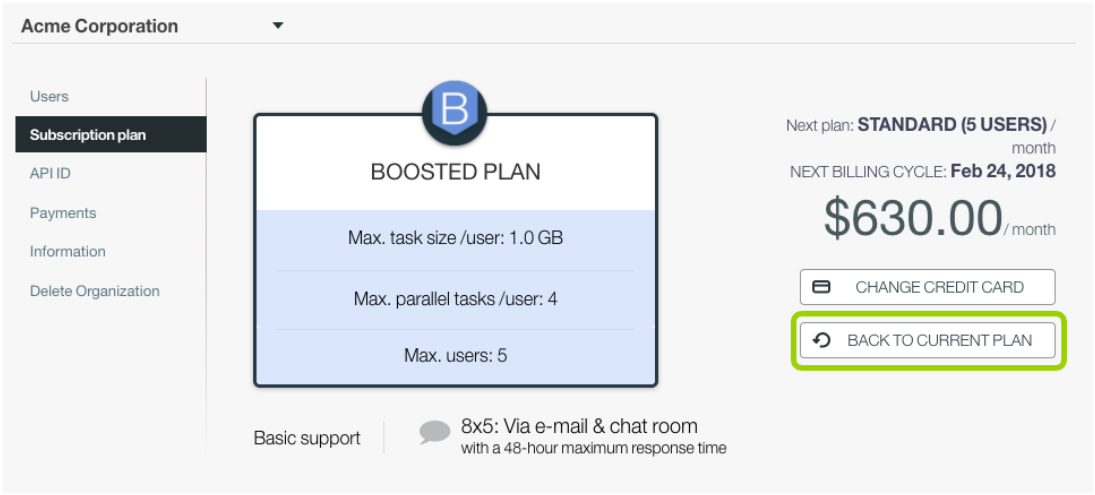

Figure 6.9: Reset subscription

A message will pop up asking for confirmation. You need to insert your current account password to confirm it.

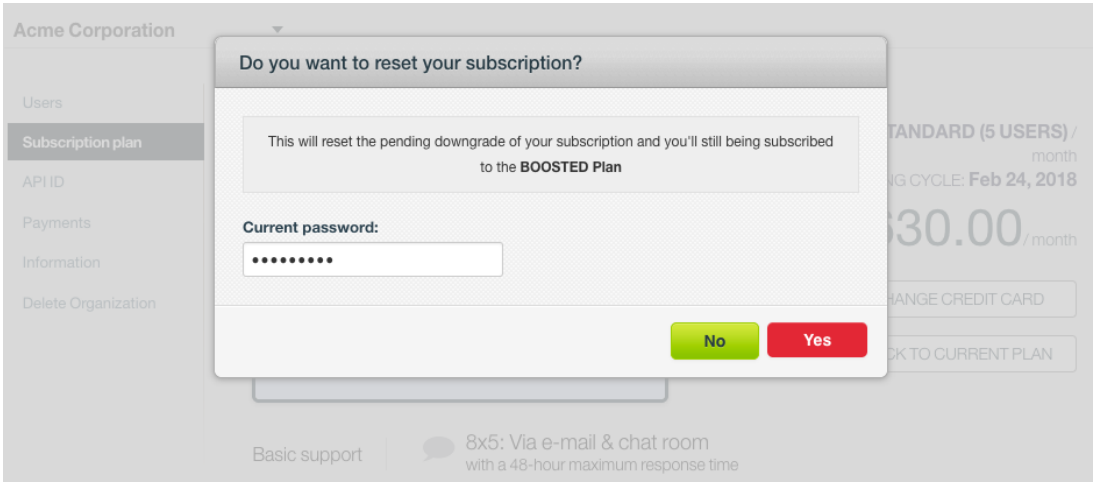

Figure 6.10: Reset subscription confirmation

6.1.1 Cancel the Organization Subscription

Only the owner can **cancel** the organization subscription. The cancelation will take effect when your current billing cycle ends. If you cancel the subsription, the organization users will have access to the projects and resources that have been created during the subscription period, but no one will be able to create, edit, move or delete resources in the organization when the cancelation takes effect.

To cancel the subscription, click on the Cancel plan button as shown in Figure 6.11.

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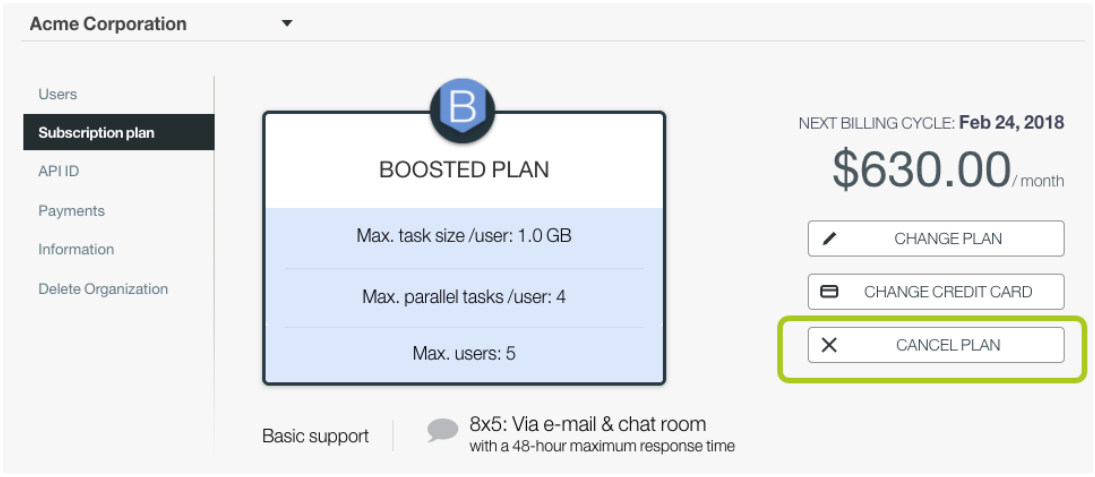

Figure 6.11: Cancel plan

You need to **confirm** the cancelation inserting your current account password.

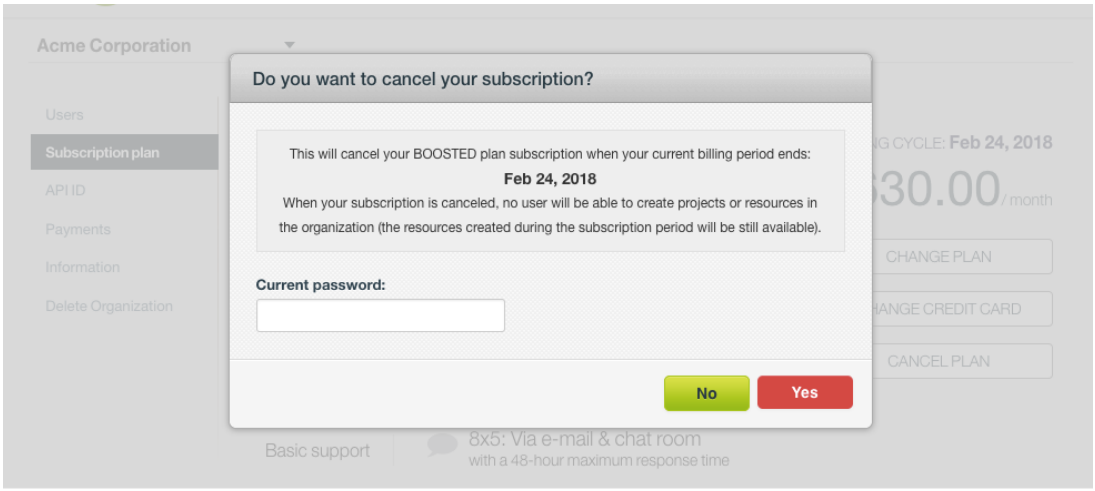

Figure 6.12: Confirm subscription cancelation

6.2 API ID

In this section of your organization settings, you can find the API ID of the organization (see Figure 6.13). You will need it when you are using the API to create projects in the organization.

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Figure 6.13: Organization API ID

To **create a project in an organization**, you need to set an additional parameter in the query string apart from the `BIGML_AUTH` that contains your authentication credentials (the username and api_id):

```
curl
"https://bigml.io/project?$BIGML_AUTH;organization=organization/5a68d2d79841fa315600000b\
      -X POST \
      -H 'content-type: application/json' \
      -d '{"name": "My first project"}'
```

To **create a resource in an organization project**, you do not need to include the organization id anymore; you need to include the project id in the request:

```
curl
"https://bigml.io/dataset?$BIGML_AUTH;project=project/3d45f3t456t67000987hg67\
      -X POST \
      -H 'content-type: application/json' \
      -d '{"source": "source/5a708d3b9841fa25b5000000"}'
```

For more information on using organizations through the BigML API, please refer to the organization REST API documentation[1].

6.3 Payments

In the **Payments** section, you can find the **payment method** linked to your subscription and the **list of purchases** made for your organization (see Figure 6.14).

[1] https://bigml.com/api/organizations

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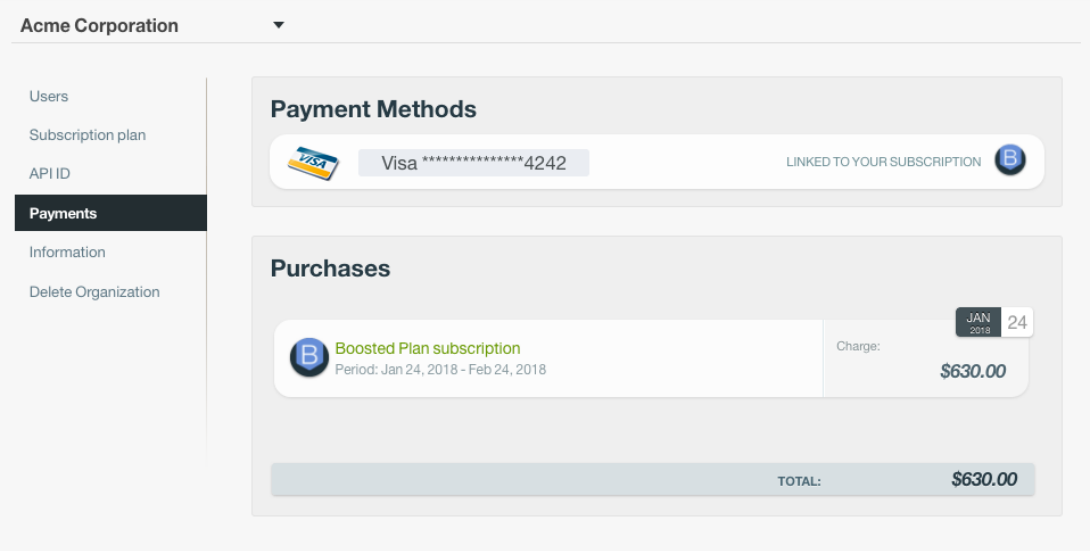

Figure 6.14: Payments history

If you click on each **payment**, you will be redirected to the **invoice** (which is also sent to you via e-mail at the beginning of a new billing cycle). See Figure 6.15.

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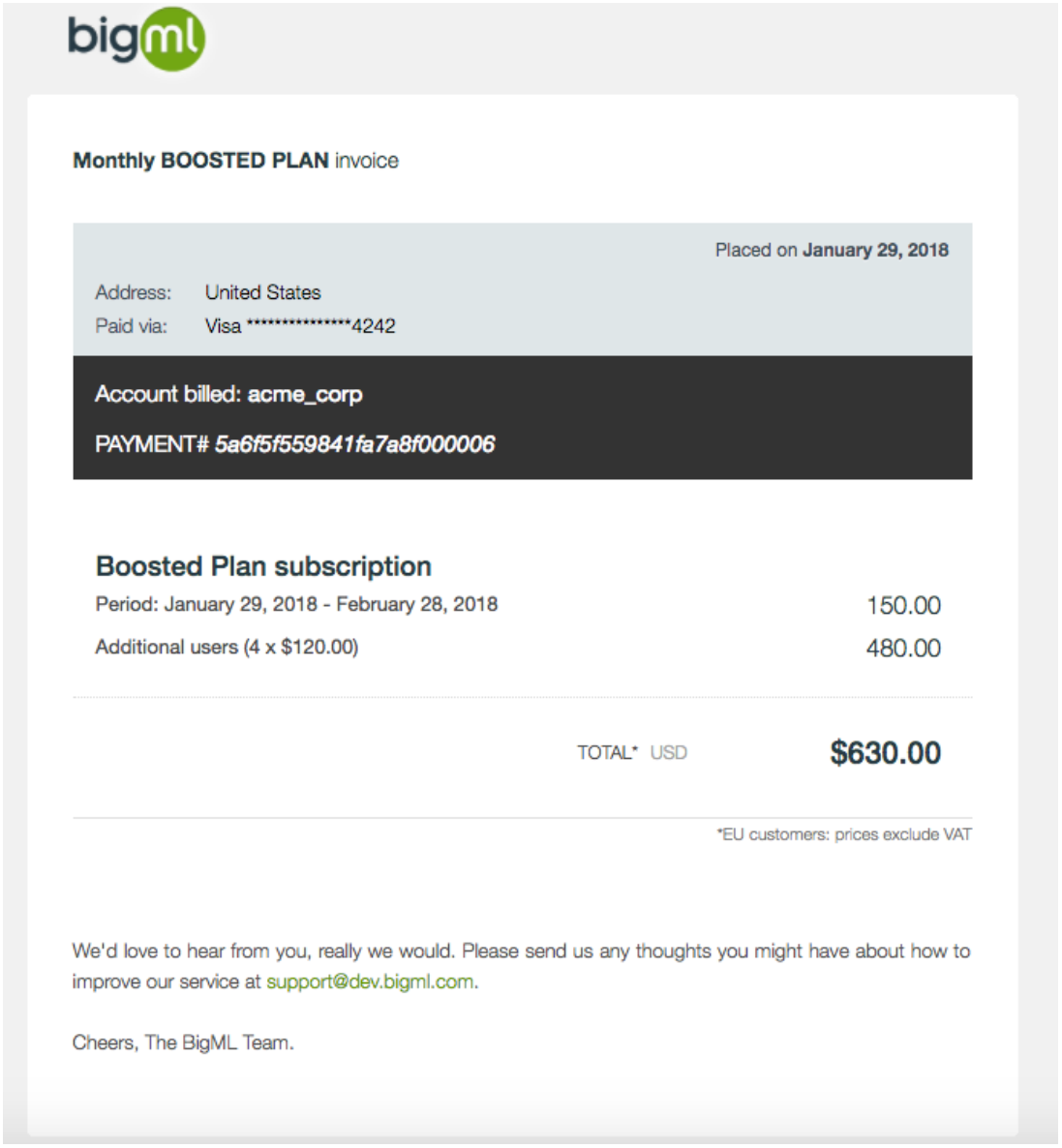

Figure 6.15: Payment invoice example

The **payment method** is the bank card you entered when you first created the organization. You can edit it from the **Subscription plan** section (see Figure 6.16).

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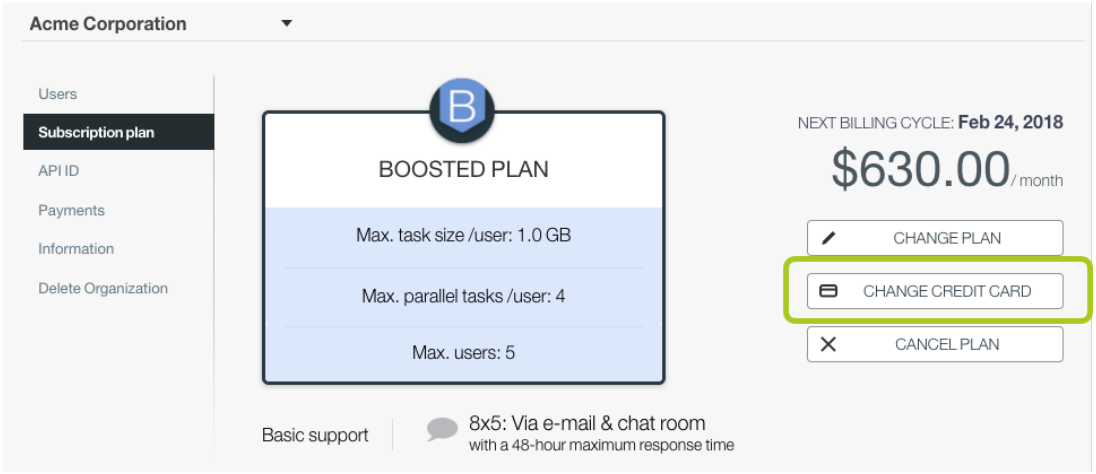

Figure 6.16: Update the credit card

A window will be displayed asking you for the new card details (see Figure 6.17)

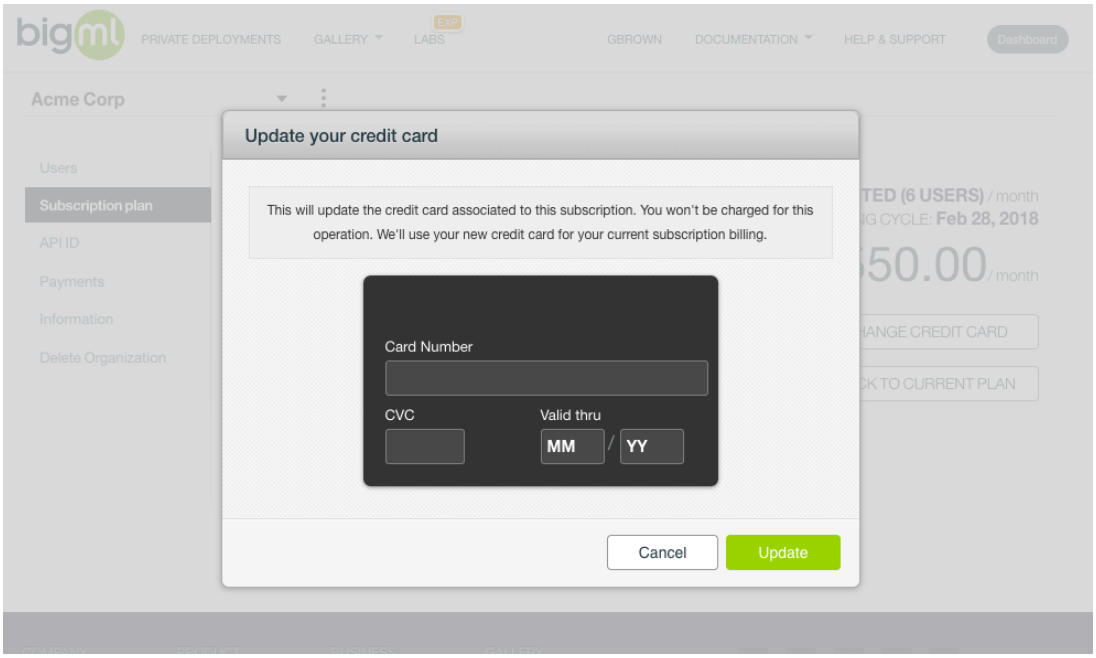

Figure 6.17: Enter the new card details

6.4 Editing the Organization Information

The **owner** can edit the following organization information by clicking on the **Information** section (see Figure 6.18):

- **Organization display name**: the original name of the organization set during the organization creation cannot be modified (the name used for the URL in the project list). However, you can edit the name displayed for your organization. This name accepts spaces and other characters besides letters and numbers.
- **Organization e-mail**: this is the e-mail where all the organization notifications will be sent. If the billing e-mail is a different one, the billing information notifications will be sent to the billing e-mail.
- **Billing details**: the subscription plan will be billed to the person or the organization that you provide for the billing information.

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- Name
- Billing e-mail
- Address
- City
- State/Province
- Tax ID
- ZIP/Postal Code
- Country

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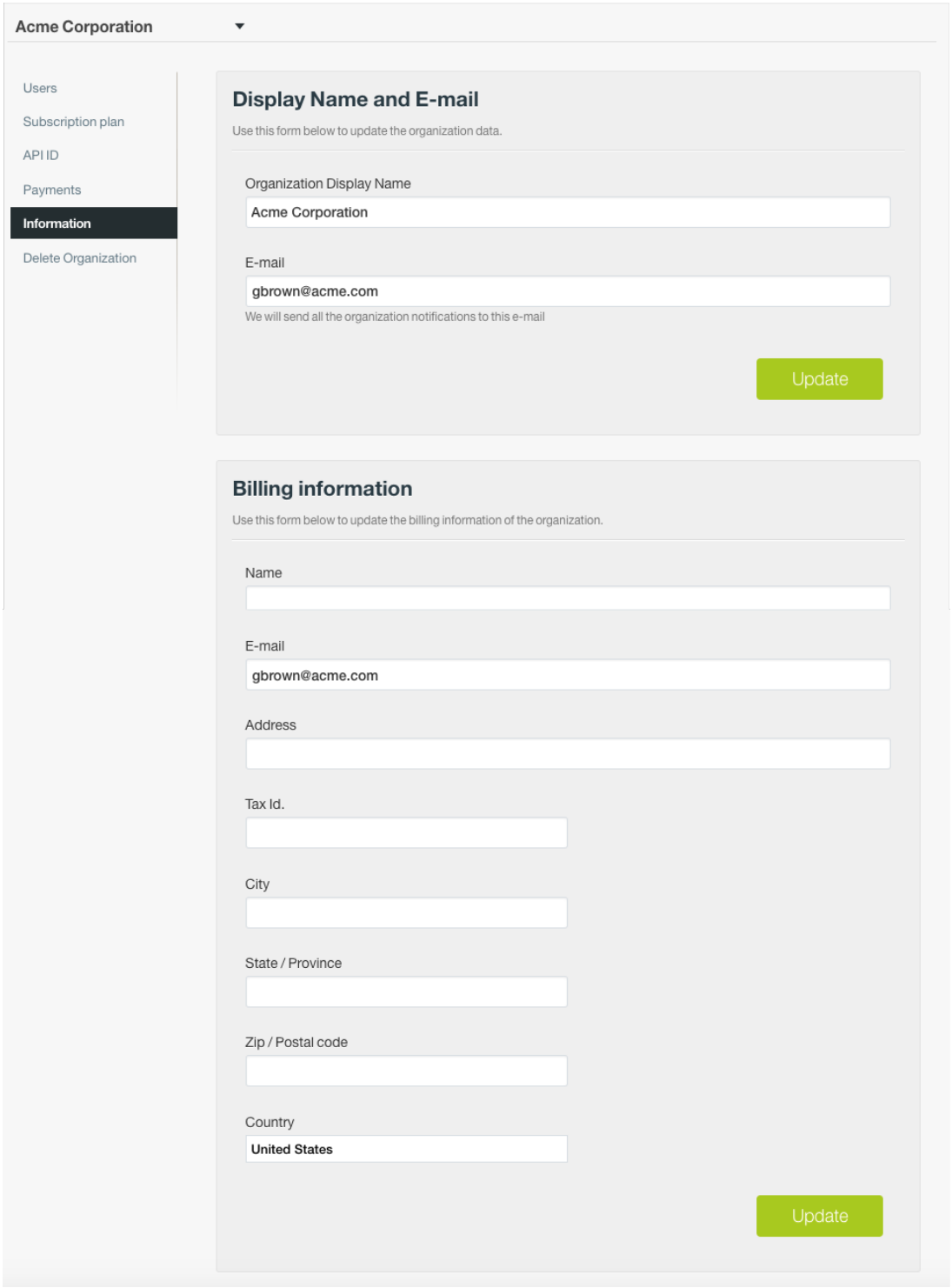

Figure 6.18: Organization information

6.5 Deleting the Organization

The **owner** can delete the organization following these steps:

- From your organization account, in the **Delete Organization** (negrita) section, click the Delete organization button.

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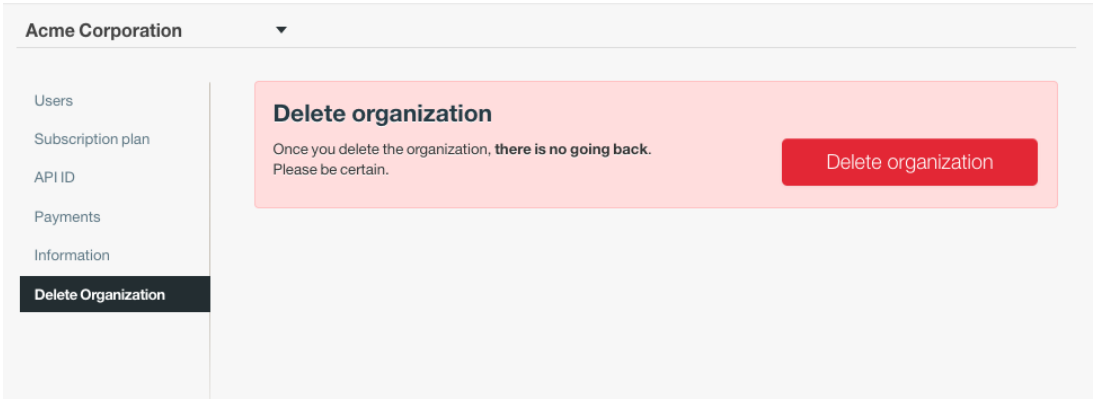

Figure 6.19: Delete organization

- A modal window will be display asking for confirmation. You need to insert the password of your personal account and click the Delete button.

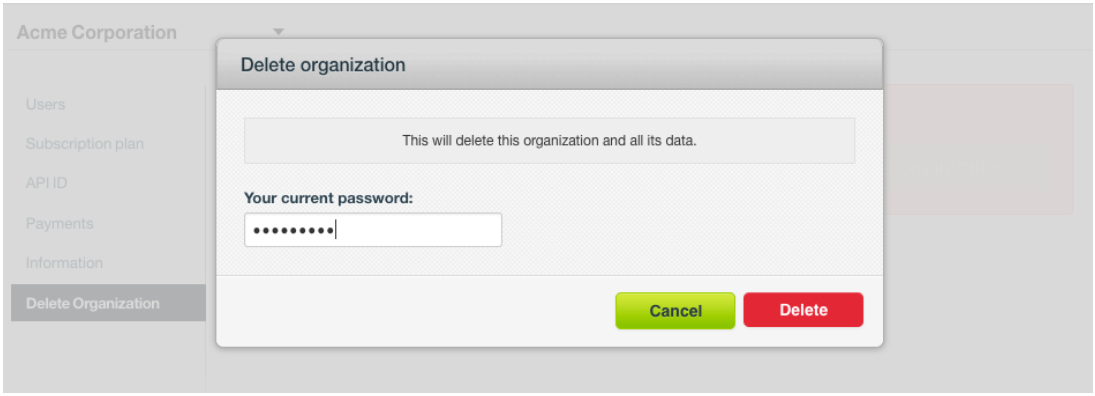

Figure 6.20: Delete organization confirmation

Deleting the organization will also permanently **delete** all the **projects** and **resources** that belong to the organization, and there is no way you (or even the IT folks at BigML) can retrieve it.

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CHAPTER 7

Takeaways

- Any user with a BigML account can create an organization.
- To **create** an organization, you need to set a **name** and buy a **subscription plan**.
- Users can belong to one or more organizations.
- The resources in the organization need to be created within a given **project**.
- Users in the organization can access the resources depending on their permissions for each project.
- User can still work on their **personal Dashboards** where all the resources will be **private**.
- Depending on the Dashboard you are working on (personal vs. organization), they will enjoy the corresponding subscription plan.
- All the **resources** in the organization need to be created within a **project**.
- Each user must have a **role** in the organization. There are four different roles: owner, admin, member, and restricted member.
- The **owner** of the organization has full access to projects, the organization account, and he or she is the only one that can manage the subscription plan.
- The **admins** of an organization have full access to projects, can invite other users to the organization, and manage their permissions.
- **Members** can create new projects, and access public projects and private projects where they have at least read permissions.
- **Restricted members** can access public projects and private projects where they have at least read permissions.
- There are three levels of **permissions** per project: admin, write, read.
- **Admin permissions** give users full access to the project resources, and allow you to invite other users and edit their permissions within the project.
- **Write permissions** allow users to create new resources in a project.
- **Read permissions** allow users to view the resources in a project.
- Projects can be **public** (all users in the organization can access their projects with write permissions) or **private** (only members invited to the project have access).
- All the resources in the organization will belong to the organization. If a user deletes his/her account or leaves the organization, the resources created by this user will remain accessible in the organization.
- The organization owner can **delete** the organization.

```
Please use the noidx option in the documentclass invocation.
```

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Glossary

Admin a role assigned to a user in a given organization. If you are an admin, you can invite new users to the organization and assign the roles to those users. You can also create new projects in the organization, and fully access public and the private projects. 13, 14, 19, 22, 23, 28, 35, 50

Admin permissions a level of permission assigned to a user in a private project in an organization. Admin permissions allow you to fully access the project resources and also invite other users and manage their permissions in the project. 28, 29, 31, 32

Dashboard The BigML web-based interface that helps you privately navigate, visualize, and interact with your modeling resources. ii

Dataset the structured version of a BigML source. It is used as input to build your predictive models. For each field in your dataset a number of basic statistics (min, max, mean, etc.) are parsed and produced as output. 35

Member a role assigned to a user in a given organization. If you are a member, you can create new projects in the organization, fully access public projects and the private projects where you have at least read permissions. 16, 28, 50

Organization a collaborative workspace where all the users in the organization can access, work on, and visualize the same projects and resources in the BigML Dashboard. Furthermore, organizations enable you to define different roles and permissions for each user involved on your Machine Learning projects. 1

Owner a role assigned to a user in a given organization. There can only be one owner per organization. By default,the owner is the creator of the organization. If you are the owner you can manage the organization account (including the billing), invite new users to the organization and assign the roles to those users. You can also create new projects in the organization, and fully access public and the private projects. 13, 14, 19, 21, 22, 23, 28, 35, 37, 38, 41, 46, 48, 50

Permissions the permissions in an organization regulate the actions that each user can take in each project. Basically, the edition of the project metadata, the ability to invite other users, and the access to the project resources. There are three levels of permissions, admin, write, and read permissions. 2, 4, 6, 28, 30, 31, 35, 50

Private projects a privacy setting for projects in organizations. Members and restricted members con only access a private project if they have at least read permissions. The owner and admins of the organization can access all private projects with admin permissions. 29, 32, 35, 50

Public projects a privacy setting for projects in organizations. Anyone in a given organization can access a public project. All the users will have write permissions within public projects. 35, 50

Read permissions a level of permission assigned to a user in a private project in an organization. Read permissions allow you to view the project resources. 28, 31

Restricted member a role assigned to a user in a given organization. If you are a restricted member, you cannot create new projects in the organization. You can fully access public projects and the private projects where you have at least read permissions. 27, 28, 50

Role the role in an organization regulates the actions that each user can take in the organization. Basically, the management of the organization account, and the access and ability to create projects. There are four different roles in the organization: owner, admin, member and restricted member. 4, 6, 16, 22, 26, 50

Source the BigML resource that represents the data source to which you wish to apply Machine Learning. A data source stores an arbitrarily-large collection of instances. A BigML source helps you ensure that your data is parsed correctly. The BigML preferred format for data sources is tabular data in which each row is used to represent one of the instances, and each column is used to represent a field of each instance. 35

Supervised learning a type of Machine Learning problem in which each instance of the data has a label. The label for each instance is provided in the training data, and a supervised Machine Learning algorithm learns a function or model that will predict the label given all other features in the data. The function can then be applied to data unseen during training to predict the label for unlabeled instances. ii, 35

Unsupervised learning a type of Machine Learning problem in which the objective is not to learn a predictor, and thus does not require each instance to be labeled. Typically, unsupervised learning algorithms infer some summarizing structure over the dataset, such as a clustering or a set of association rules. ii, 35

WhizzML BigML domain-specific language for automating complex Machine Learning workflows and implementing high-level algorithms. 35

Write permissions a level of permission assigned to a user in a private project in an organization. Write permissions allow you to fully access the project resources, i.e, create, update, move and delete resources. 28, 31, 35

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[1] The BigML Team. *Anomaly Detection with the BigML Dashboard*. Tech. rep. BigML, Inc., Jan. 2016.
[2] The BigML Team. *Association Discovery with the BigML Dashboard*. Tech. rep. BigML, Inc., Dec. 2015.
[3] The BigML Team. *Classification and Regression with the BigML Dashboard*. Tech. rep. BigML, Inc., May 2016.
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[5] The BigML Team. *Datasets with the BigML Dashboard*. Tech. rep. BigML, Inc., Jan. 2016.
[6] The BigML Team. *Sources with the BigML Dashboard*. Tech. rep. BigML, Inc., Jan. 2016.
[7] The BigML Team. *Time Series with the BigML Dashboard*. Tech. rep. BigML, Inc., July 2017.
[8] The BigML Team. *Topic Models with the BigML Dashboard*. Tech. rep. BigML, Inc., Nov. 2016.

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