



Platform 101

We will record today's presentation and provide the recording and slides after.

Introduce yourself in the Chat!

Name

Pronouns

Organization

What brought you here today?





Training Norms

1. Please keep yourself muted, help us reduce background noise.
2. Raise your hand or type questions into the chat.
3. Feel free to ask other participants questions in the chat!
4. We all have varying levels of Platform knowledge on this call. Ask the questions you have—no question is too simple or too advanced!



Session 1

Intro To Civis Platform
Navigating Platform
Imports and Export



Intro To Civis Platform

Who We Are

What is Civis Platform

How Do Teams Use Platform

We Are Civis

Civis Platform uses data to provide organizations with a comprehensive understanding of the audiences they care about most.

We enable nonprofits to target and measure their campaigns & programmatic efforts with precision.

We bring the same innovative technology, discipline, transparency, speed & accountability to commercial organizations, the public sector, & nonprofits around the world.





Civis Platform – What Is It?

- **Cloud Based Data Warehouse & Analytics Platform**
 - Increases Analytical Collaboration
 - Minimizes Duplication of Efforts & Decreases Time Spent Identifying Broken Processes
 - Increases Staff Efficiency (Inter & Intra Department Collaboration)
 - Enables Data Sharing and Governance
 - Automates Time Consuming Tasks

Civis Platform: Built to support nonprofit teams



Data Integration & Enrichment

Advanced Analytics & modeling

Supporter Journey Analysis

Reporting & Data Visualization

Data Exploration & Segmentation



Civis Platform enables data teams to work more efficiently in a secure, shared environment



Reporting

Measure and report on the effectiveness of your campaign

Data warehousing

Consolidate and enrich your data from membership lists, fundraising tools, other CRM's to understand your audience

Data governance and collaboration

Enable secure, cross-team collaboration with an up-to-date source of truth



Navigating Platform

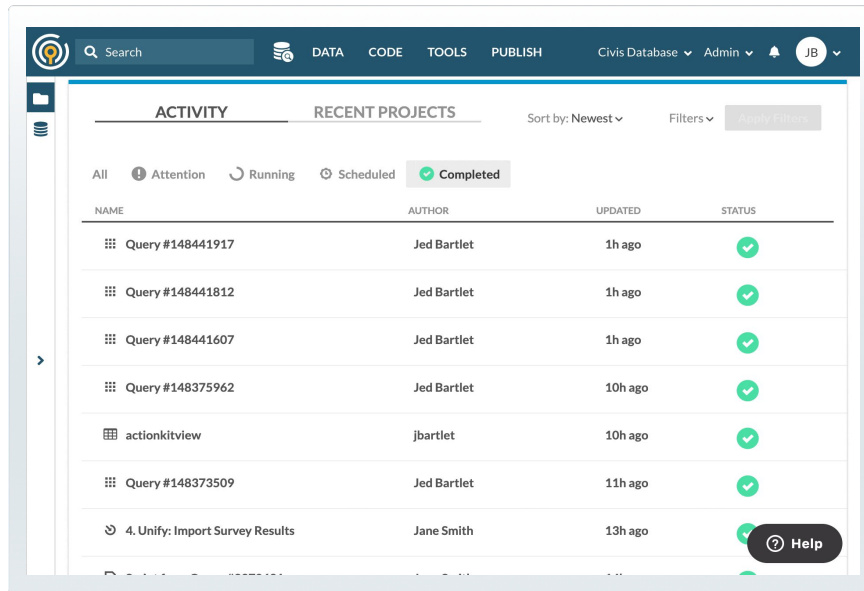
- Main Navigation Menu
- Data and Project Panes
- Standard Action Menu
- Global Search
- Help Widget

Intro to Platform

Main Navigation Menu

Access the following from the menu:

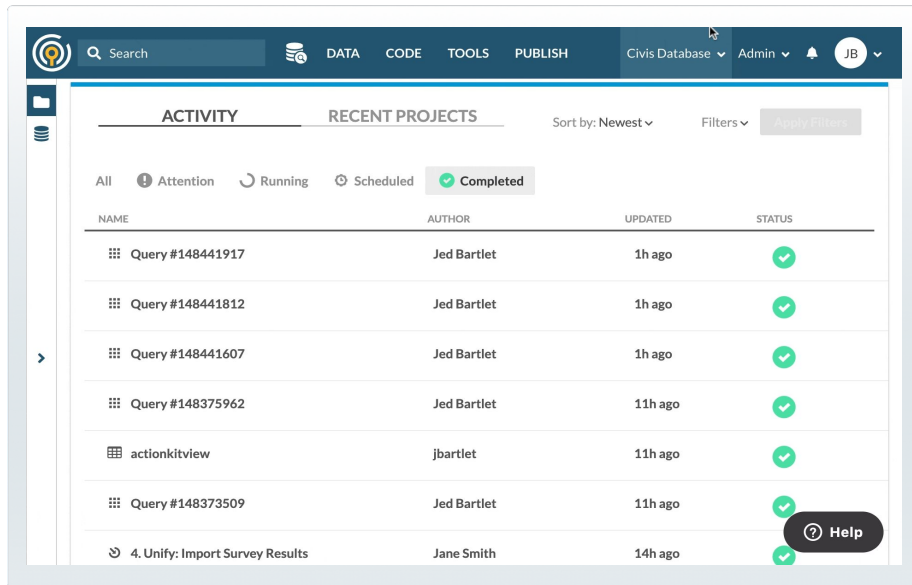
- Home
- Search
- Query
- Data (imports and exports)
- Code (notebooks and scripts)
- Tools (workflows/enhancements)
- Publish (reports/services)
- Admin
- Notifications (Announcements)
- Initials (profile and documentation)



Intro to Platform

Data Pane

- The data pane on the left displays the data on your Redshift cluster
- From the data pane, you can:
 - Search for schemas/tables
 - Expand schemas to see tables
 - Select the table names to view detailed information about the data in a table



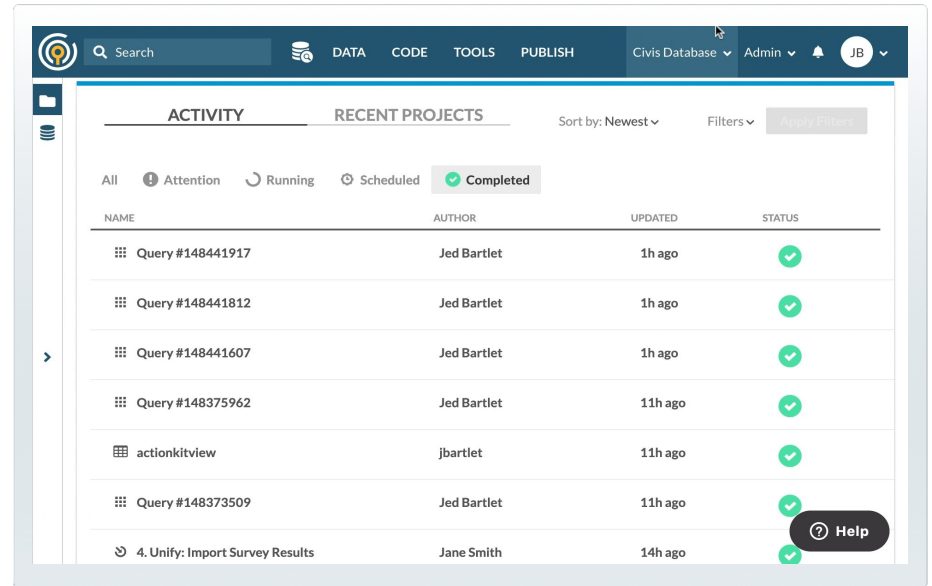
The screenshot displays the Amazon Redshift Platform interface. The top navigation bar includes a search field, a 'DATA' tab, and other menu items like 'CODE', 'TOOLS', 'PUBLISH', 'Civis Database', 'Admin', and a user profile 'JB'. The main content area is titled 'ACTIVITY' and 'RECENT PROJECTS'. It features a filter bar with 'Sort by: Newest' and 'Filters'. Below this is a table of activity items, all of which are in a 'Completed' state. The table columns are 'NAME', 'AUTHOR', 'UPDATED', and 'STATUS'. A 'Help' button is visible in the bottom right corner of the interface.

NAME	AUTHOR	UPDATED	STATUS
Query #148441917	Jed Bartlet	1h ago	Completed
Query #148441812	Jed Bartlet	1h ago	Completed
Query #148441607	Jed Bartlet	1h ago	Completed
Query #148375962	Jed Bartlet	11h ago	Completed
actionkitview	jbartlet	11h ago	Completed
Query #148373509	Jed Bartlet	11h ago	Completed
4. Unify: Import Survey Results	Jane Smith	14h ago	Completed

Intro to Platform

Project Pane

- The project pane on the left displays what you have access to
- Projects are folders in Civi Platform that allow you to:
 - Organize and store objects (reports, scripts, workflows, tables)
 - Add notes and descriptions
 - Share objects and improve collaboration across teams

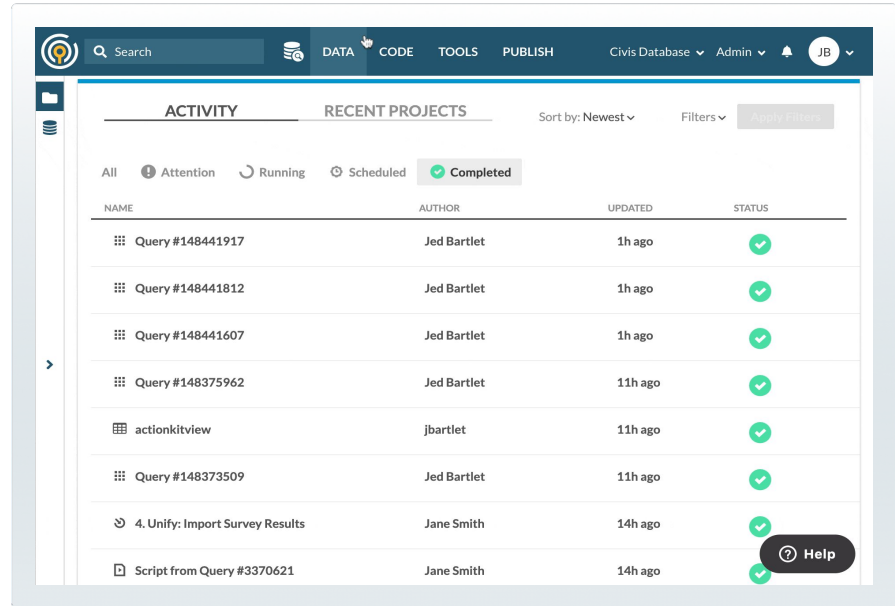


Intro to Platform

Action Menu

The following features in the standard action menu apply to all Platform objects (e.g., imports/exports, scripts, workflows):

- Share
- Notify
- Automate
- Clone
- Archive

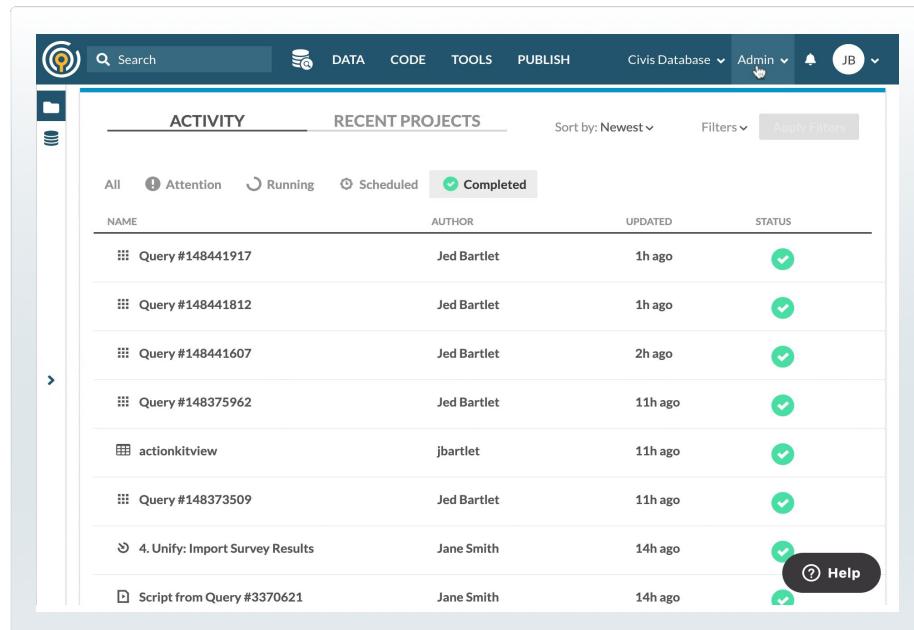


Intro to Platform

User Management

Admin Center is a stand-alone page that allows users to view, edit, and manage users/groups within their organization

Note: Organization Admins and Group Admins have additional permissions to create/edit users and groups.



The screenshot displays the Civis Admin Center interface. At the top, there is a navigation bar with a search bar, a menu icon, and tabs for DATA, CODE, TOOLS, and PUBLISH. The user is logged in as 'Admin' with a profile picture 'JB'. Below the navigation bar, the main content area is titled 'ACTIVITY' and 'RECENT PROJECTS'. The 'ACTIVITY' tab is active, showing a table of completed activities. The table has columns for NAME, AUTHOR, UPDATED, and STATUS. The activities listed are:

NAME	AUTHOR	UPDATED	STATUS
Query #148441917	Jed Bartlet	1h ago	Completed
Query #148441812	Jed Bartlet	1h ago	Completed
Query #148441607	Jed Bartlet	2h ago	Completed
Query #148375962	Jed Bartlet	11h ago	Completed
actionkitview	jbartlet	11h ago	Completed
Query #148373509	Jed Bartlet	11h ago	Completed
4. Unify: Import Survey Results	Jane Smith	14h ago	Completed
Script from Query #3370621	Jane Smith	14h ago	Completed

A 'Help' button is visible in the bottom right corner of the interface.

Intro to Platform

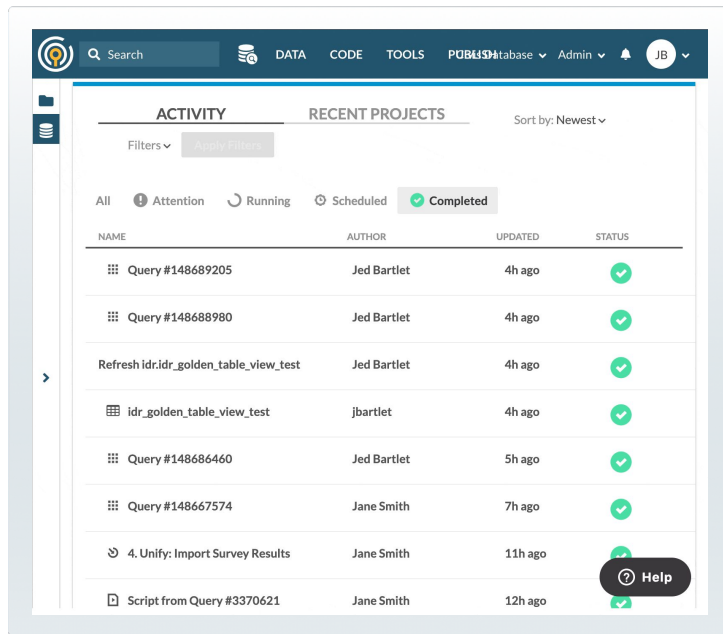
Global Search

The search bar allows you to:

- Search through all objects you have access to
- Filter results by type and author
- Sort results by relevance, author, and created date
- Tab through pages of results

For the most effective search:

- Search for full phrases
- Include more rare terms (name of project versus “import”)



The screenshot displays the platform's search results interface. At the top, there is a search bar and navigation tabs for DATA, CODE, and TOOLS. The user is logged in as 'Admin' and 'JB'. The main content area is titled 'ACTIVITY' and 'RECENT PROJECTS', with a 'Sort by: Newest' dropdown. Below the title, there are filter options for 'Filters' and 'Status'. The status filters include 'All', 'Attention', 'Running', 'Scheduled', and 'Completed' (which is selected). The main table lists activities with columns for NAME, AUTHOR, UPDATED, and STATUS. The table contains the following data:

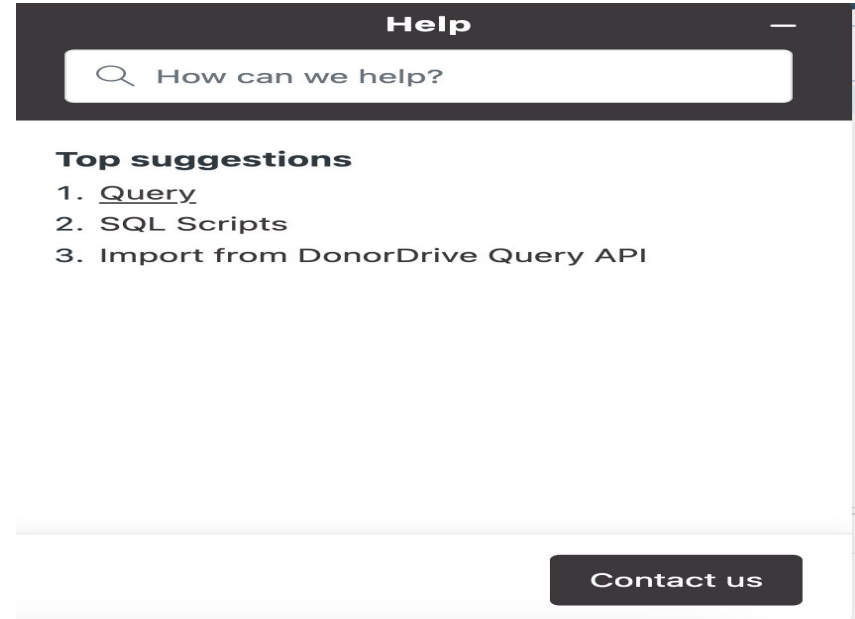
NAME	AUTHOR	UPDATED	STATUS
Query #148689205	Jed Bartlet	4h ago	Completed
Query #148688980	Jed Bartlet	4h ago	Completed
Refresh idr_golden_table_view_test	Jed Bartlet	4h ago	Completed
idr_golden_table_view_test	jbartlet	4h ago	Completed
Query #14866460	Jed Bartlet	5h ago	Completed
Query #148667574	Jane Smith	7h ago	Completed
4. Unify: Import Survey Results	Jane Smith	11h ago	Completed
Script from Query #3370621	Jane Smith	12h ago	Completed

A 'Help' button is visible in the bottom right corner of the table area.

Intro to Platform

Help Widget

- The help widget can be found at the bottom right of your screen in Platform
- From the Help Widget you can
 - Search through Zendesk articles for documentation on a wide array of topics
 - Send in a ticket by clicking Contact Us





Imports and Exports

Credentials

Common Data Sources

API

Credentials

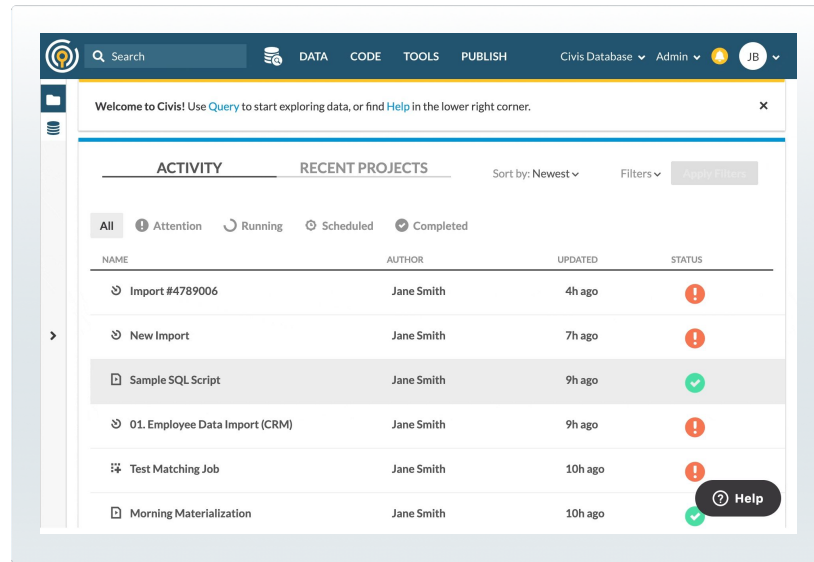
Purpose and Use of Credentials

- Platform credentials are a great way to store and manage access information without adding it to code
- Credentials allow you to connect to external sources (e.g. Databases, Salesforce, Google) in order to successfully execute job runs in Platform, such as imports, exports, and scripts
- You may need to create a credentials when working with the following (or others):
 - Databases
 - Facebook
 - Google Analytics
 - Salesforce

Credentials

Creating Credentials

- To create a credential in Platform, navigate to the Admin tab, select “Credentials”
- Click “New Credential” in the top right corner
- The exact requirements for the fields depend on the source / API you are connecting to
- If you do not see the service named on the “Credential Type” dropdown, select "Custom"



Credentials

Sharing Credentials

- From the menu on the top-right of the credential detail page, select “Share”
- Specify the permission level for the user/group (i.e. viewer, editor, manager)

The screenshot shows a web application interface for managing credentials. At the top, there is a navigation bar with a search icon, a search input field, and several menu items: DATA, CODE, TOOLS, PUBLISH, Civis Database, Admin, and a user profile icon labeled 'JB'. Below the navigation bar, the main content area is titled 'Credentials'. It features a search input field with the placeholder text 'Search for credentials...' and a 'Create Credential' button. Below the search field, there are two filter buttons labeled 'Type' and 'Owner'. The main content is a table with the following columns: ID, NAME, TYPE, and OWNER. The table contains several rows of credential data.

ID	NAME	TYPE	OWNER
25368	hi platform slack credential	Custom	annacarmichael
3657	ACME Twitter API Credential Example Twitter Credential for Demo user	Custom	No Owner
24635	NONPROFIT_DEMO_DATABASE_URI	Custom	jbartlet
24622	NONPROFIT_DEMO_DATA_LIBRARY_URI	Custom	jbartlet
24623	github	Github Github API Connection	jbartlet
10514	UNIVERSAL_AC_DB_URI	Custom	eting

At the bottom right of the table, there is a 'Help' button with a question mark icon.

Imports and Exports

Common Sources

The following sources can be found under the data pane in Platform

- Databases
- File (csv,txt)
- Google Sheets
- Google Analytics
- Salesforce
- SFTP sites
- S3 Buckets

The screenshot shows the 'DATA' pane in the CiviCRM Platform interface. The top navigation bar includes 'QUERY', 'DATA', 'CODE', 'TOOLS', and 'PUBLISH'. The user is logged in as 'Civis BigQuery'. The 'DATA' pane is divided into two main sections: 'IMPORTS' and 'EXPORTS', each with a 'View All' link. Under 'IMPORTS', there are several options: 'Database' (Sync from Oracle, SQL Server, PostgreSQL, MySQL, BigQuery, or Snowflake), 'Facebook' (Import records from Facebook), 'File' (Upload a comma delimited CSV or a tab- or pipe-delimited text file), 'Google Analytics' (Import records from Google Analytics), 'Google Sheet' (Import spreadsheets from Google Drive), 'Salesforce' (Import Salesforce data), 'S/FTP' (Import records from a file in an S/FTP location), 'URL' (Import records from a single delimited file stored at an HTTP URL), and 'More Imports...'. Under 'EXPORTS', there are several options: 'Database' (Sync to Oracle, SQL Server, PostgreSQL, MySQL, BigQuery, or Snowflake), 'Google Sheet' (Export to a Google Drive spreadsheet), 'Script' (Export to a local CSV using SQL), 'S/FTP' (Export records to a file in an S/FTP location), and 'Salesforce' (Export records to Salesforce).

Imports and Exports

Importing From a Database

- Under **Source** select the database and credential you would like to sync into your destination database.
 - *If this is your first time syncing data from this source database, you'll need to set it up using New Database. Fill out the the JDBC URL, username, and password information and click Add.*
- Under **Destination** select the database and credential you would like to sync data into.

The screenshot displays a configuration window for importing data from a source database to a destination database. The window is divided into two main sections: SOURCE and DESTINATION.

SOURCE: A dropdown menu shows 'ActionKit: ak_username' with a downward arrow. Below it is a blue button labeled 'New Database' with a hamburger menu icon.

DESTINATION: A dropdown menu shows 'Civis Database: jbartlet [default]'. Below this, there are two columns for schema and table selection. The 'SCHEMA*' column has a dropdown menu showing 'public' with a blue 'X' icon and a downward arrow. The 'TABLE*' column has a dropdown menu showing 'new_tables' with a blue 'X' icon and a downward arrow.

Imports and Exports

Incremental Database Sync

- A column is selected for the import to only pull rows where `last_modified_column` in the source \geq `last_modified_column` in the destination. The default value is "Auto-Detect".
 - *When this is the case, the column name must contain "modif" or "update" as part of the name.*
- You can also specify a custom column name or leave blank if the table does not have a last modified column.

The screenshot shows a configuration interface for a database sync. It includes the following elements:

- SCHEMA***: A dropdown menu with the value "public" selected.
- TABLE***: A dropdown menu with the value "new_table" selected.
- For wildcard source tables, use as an optional prefix for destination table names.**: A text label with a grid icon, an upward arrow, and a close button (X).
- FULL REFRESH ON EACH RUN**: A toggle switch currently set to "No".
- TRUNCATE LONG TEXT**: A toggle switch currently set to "No".
- PRIMARY KEY**: An empty text input field.
- LAST MODIFIED COLUMN**: A text input field containing the value "Auto-Detect".

Imports and Exports

Salesforce Import

- There are 5 required parameters for the Salesforce Import and Export Jobs in Platform:
 - User Credential
 - Client Credential
 - Destination Database
 - Destination Database Credential
 - Destination Schema/Table

Salesforce Import

This script was created from a template: [Salesforce Import](#)

JB Jed Bartlet Settings ▾

SCRIPT_MODE

USER CREDENTIAL *

[Create Credential](#)

Custom credential with Salesforce Username / Password+Security Token

CLIENT CREDENTIAL *

[Create Credential](#)

Custom credential with Salesforce Consumer Key / Secret

Imports and Exports

Salesforce Import

- There are many optional parameters for the Salesforce Import and Export Jobs in Platform including:
 - Salesforce Instance URL
 - Salesforce Object
 - SOQL Query
 - Incremental Sync?

Salesforce Import

This script was created from a template: [Salesforce Import](#)

JB Jed Bartlet Settings ▾

SCRIPT_MODE

 ✕ ▾

USER CREDENTIAL *

 ▾

[Create Credential](#)

Custom credential with Salesforce Username / Password+Security Token

CLIENT CREDENTIAL *

 ▾

[Create Credential](#)

Custom credential with Salesforce Consumer Key / Secret

Imports and Exports

Searching Additional Templates

- You can search for additional templates created by the Civis Team in a few ways:
 - Use the Global Search Bar
 - Click on more Imports or Exports under the Data Tab
 - Click on more Templates under the Code tab

IMPORTS [View All](#)

CREATE

- Database**
Sync from Oracle, SQL Server, PostgreSQL, MySQL, BigQuery, or Snowflake
- Facebook**
Import records from Facebook
- File**
Upload a comma delimited CSV or a tab- or pipe-delimited text file
- Google Analytics**
Import records from Google Analytics
- Google Sheet**
Import spreadsheets from Google Drive
- Salesforce**
Import Salesforce data
- S/FTP**
Import records from a file in an S/FTP location
- URL**
Import records from a single delimited file stored at an HTTP URL
- [More Imports...](#)

EXPORTS [View All](#)

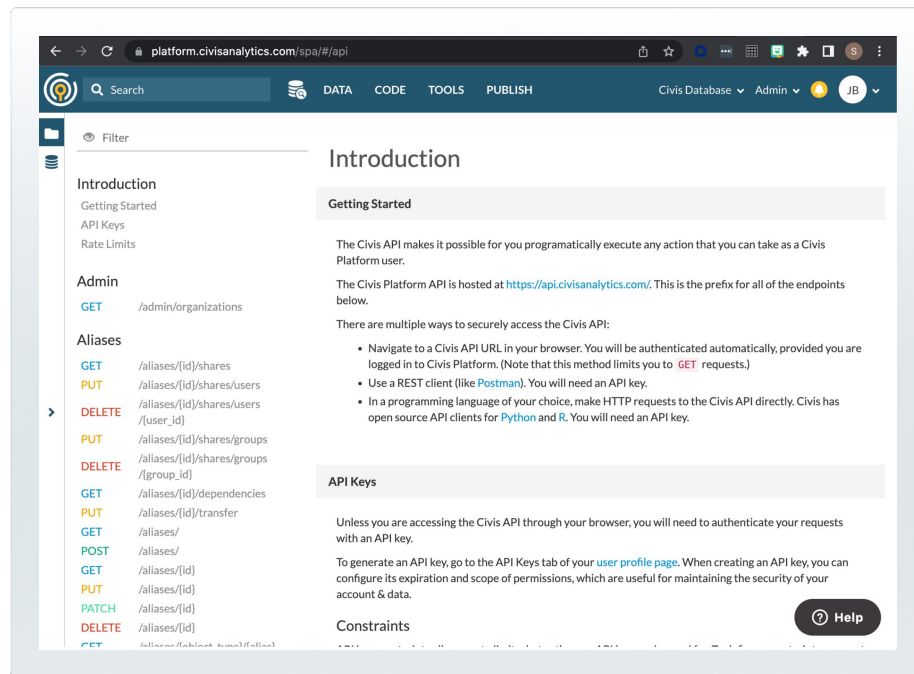
CREATE

- Database**
Sync to Oracle, SQL Server, PostgreSQL, MySQL, BigQuery, or Snowflake
- Google Sheet**
Export to a Google Drive spreadsheet
- Script**
Export to a local CSV using SQL
- S/FTP**
Export records to a file in an S/FTP location
- Salesforce**
Export records to Salesforce

Imports and Exports

API

- If you are unable use one of our out of the box imports and exports you can also connect your database to external sources through the API
- The Civi API is hosted at <https://api.civisanalytics.com/> – this is the prefix for all the endpoints



The screenshot shows the Civi API documentation page. The left sidebar lists the following endpoints:

- Introduction
 - Getting Started
 - API Keys
 - Rate Limits
- Admin
 - GET /admin/organizations
- Aliases
 - GET /aliases/{id}/shares
 - PUT /aliases/{id}/shares/users
 - DELETE /aliases/{id}/shares/users/{user_id}
 - PUT /aliases/{id}/shares/groups
 - DELETE /aliases/{id}/shares/groups/{group_id}
 - GET /aliases/{id}/dependencies
 - PUT /aliases/{id}/transfer
 - GET /aliases/
 - POST /aliases/
 - GET /aliases/{id}
 - PUT /aliases/{id}
 - PATCH /aliases/{id}
 - DELETE /aliases/{id}
 - GET /aliases/{id}/...

The main content area shows the "Introduction" section, which includes a "Getting Started" subsection. The text in the "Getting Started" section reads:

The Civi API makes it possible for you programmatically execute any action that you can take as a Civi Platform user.

The Civi Platform API is hosted at <https://api.civisanalytics.com/>. This is the prefix for all of the endpoints below.

There are multiple ways to securely access the Civi API:

- Navigate to a Civi API URL in your browser. You will be authenticated automatically, provided you are logged in to Civi Platform. (Note that this method limits you to **GET** requests.)
- Use a REST client (like **Postman**). You will need an API key.
- In a programming language of your choice, make HTTP requests to the Civi API directly. Civi has open source API clients for **Python** and **R**. You will need an API key.

Below this is the "API Keys" section, which states: "Unless you are accessing the Civi API through your browser, you will need to authenticate your requests with an API key." It also mentions: "To generate an API key, go to the API Keys tab of your [user profile page](#). When creating an API key, you can configure its expiration and scope of permissions, which are useful for maintaining the security of your account & data."

The "Constraints" section is partially visible at the bottom.



Thank you!

Reach out to Support@CivisAnalytics.com with any questions!

Register for Platform 201 on Wednesday, 1/31:
<https://www.civisanalytics.com/platform-201-registration/>