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.

MEDECINS SANS FRONTIERES

LCV
Our Earth Is Worth Fighting For

Planned Parenthood

USA for UNHCR
The UN Refugee Agency

HUMAN RIGHTS CAMPAIGN

The National Domestic Violence HOTLINE

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

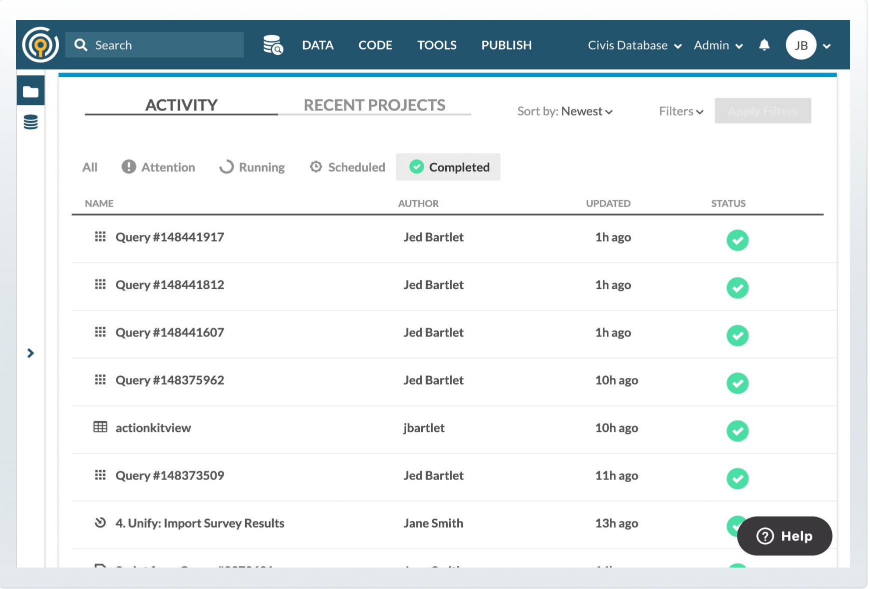
Main Navigation Menu
Data and Project Panes
Standard Action Menu
Global Search
Help Widget

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)

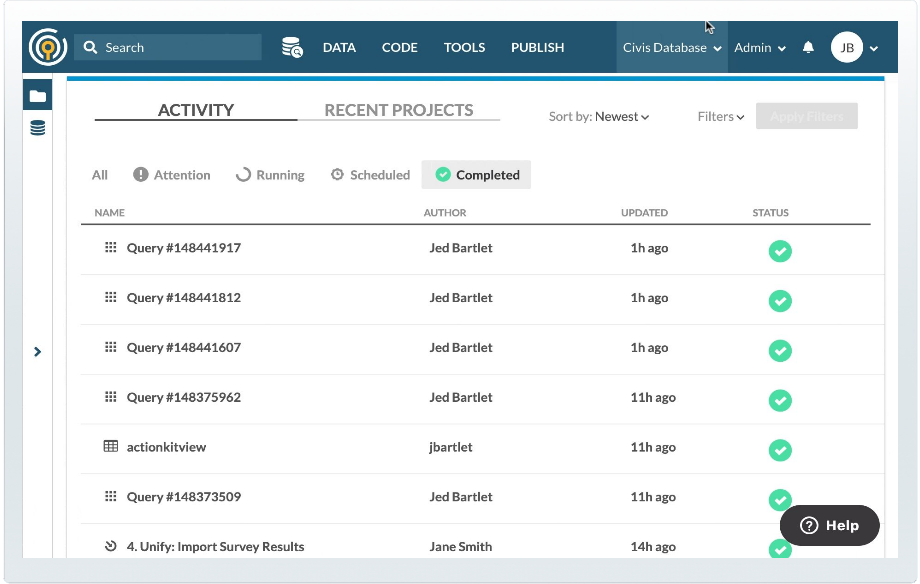


More information can be found in Civis Help Documentation: [Quick Start Guide]

Intro to Platform

Data Pane

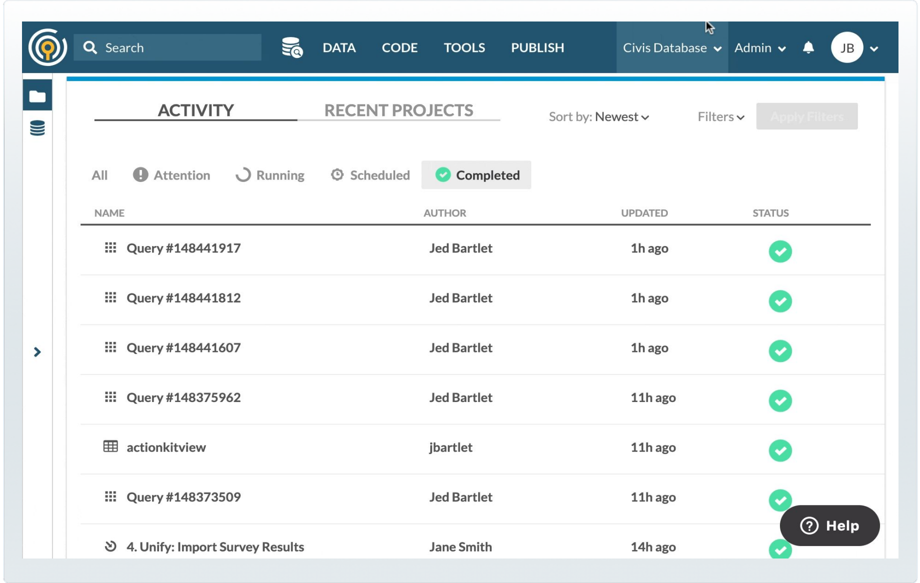
- The data pane on the left displays the data on your Redshift cluster
- From the data pane, you can:
  - Search for schemas/tables
  - Expand schemas to see tables
  - Select the table names to view detailed information about the data in a table



Intro to Platform

Project Pane

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

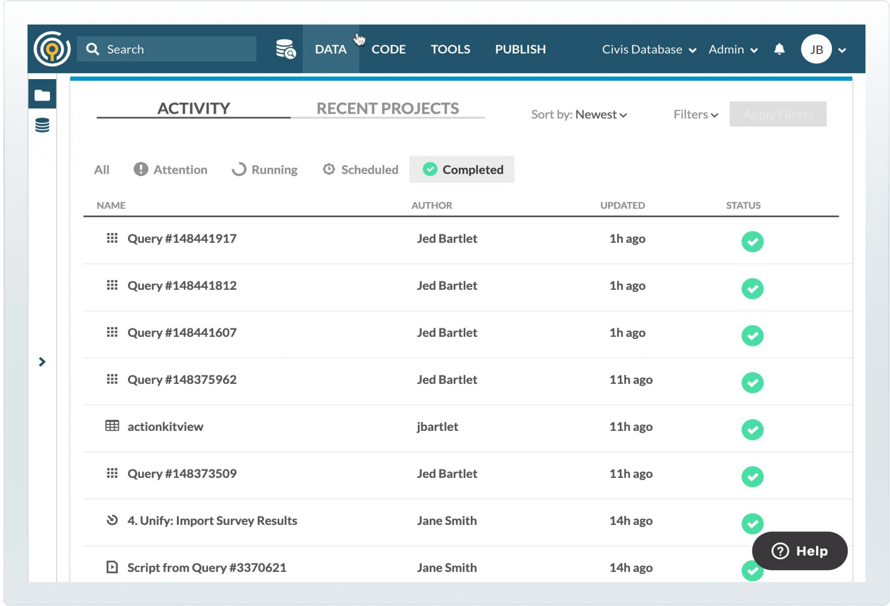


Intro to Platform

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

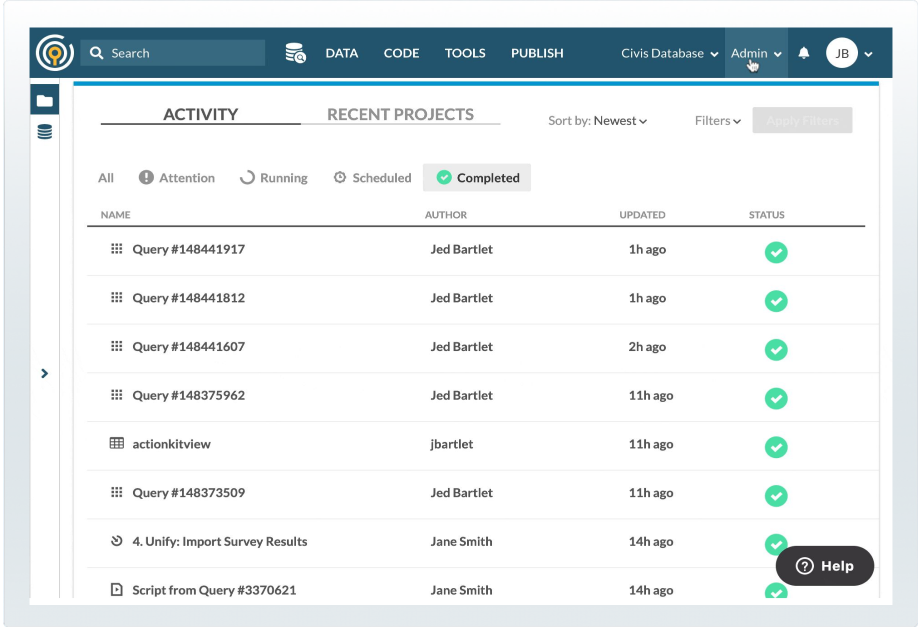


Intro to Platform

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.



More information can be found in Civis Help Documentation: [Admin Center]

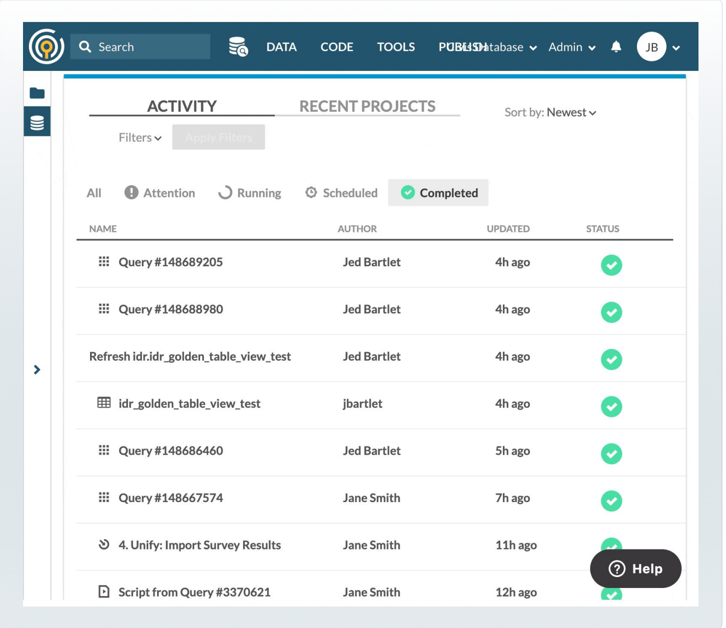
Intro to Platform
Global Search

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:

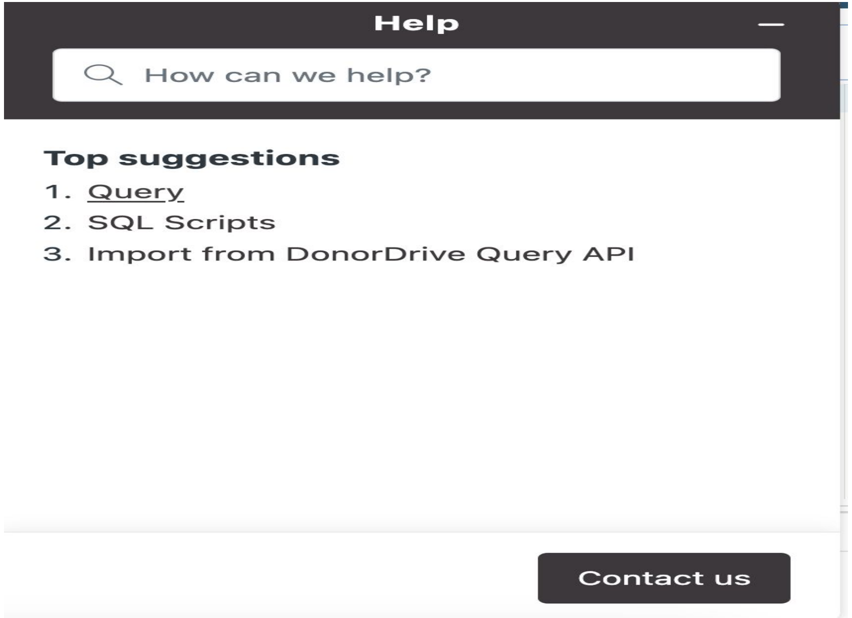
- Search for full phrases
- Include more rare terms (name of project versus “import”)



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

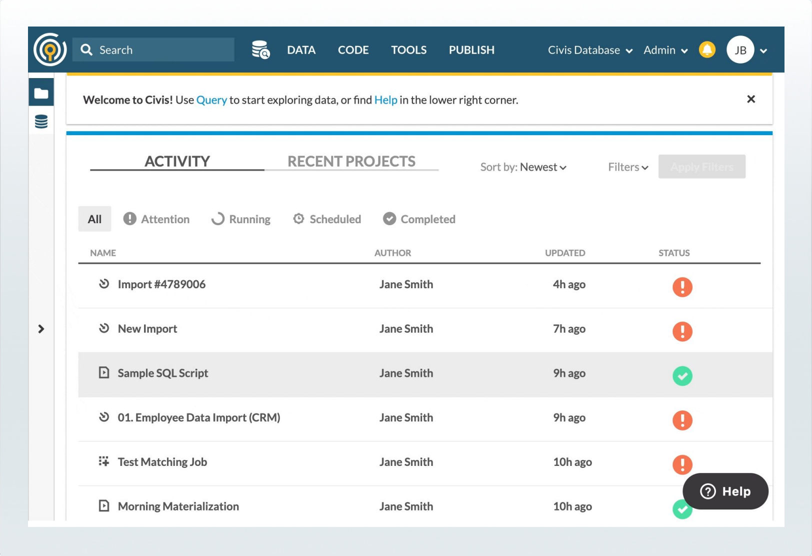
- Platform credentials are a great way to store and manage access information without adding it to code
- Credentials allow you to connect to external sources (e.g. Databases, Salesforce, Google) in order to successfully execute job runs in Platform, such as imports, exports, and scripts
- You may need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

More information can be found in Civis Help Documentation: [Credentials]

Credentials

Creating Credentials

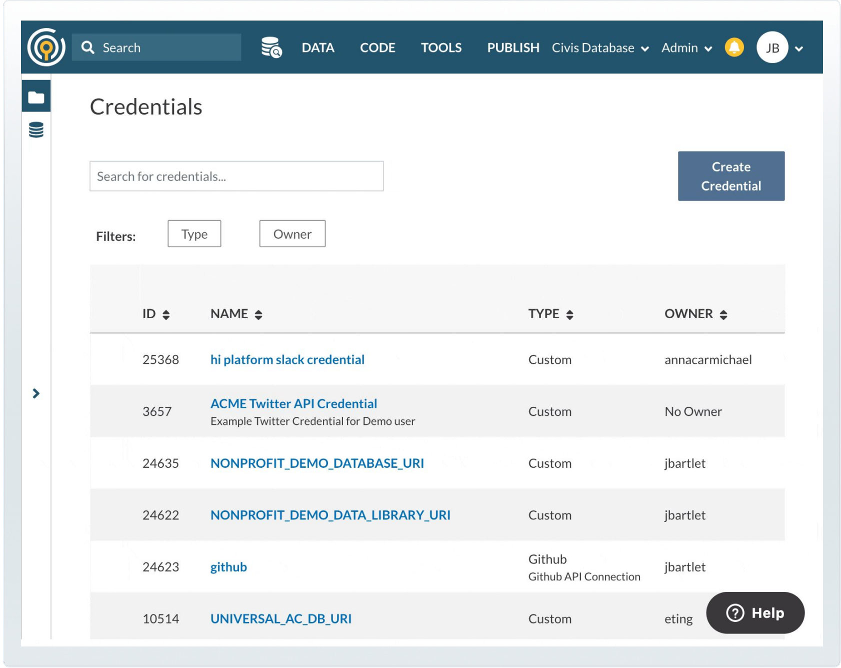
- To create a credential in Platform, navigate to the Admin tab, select “Credentials”
- Click “New Credential” in the top right corner
- The exact requirements for the fields depend on the source / API you are connecting to
- If you do not see the service named on the “Credential Type” dropdown, select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

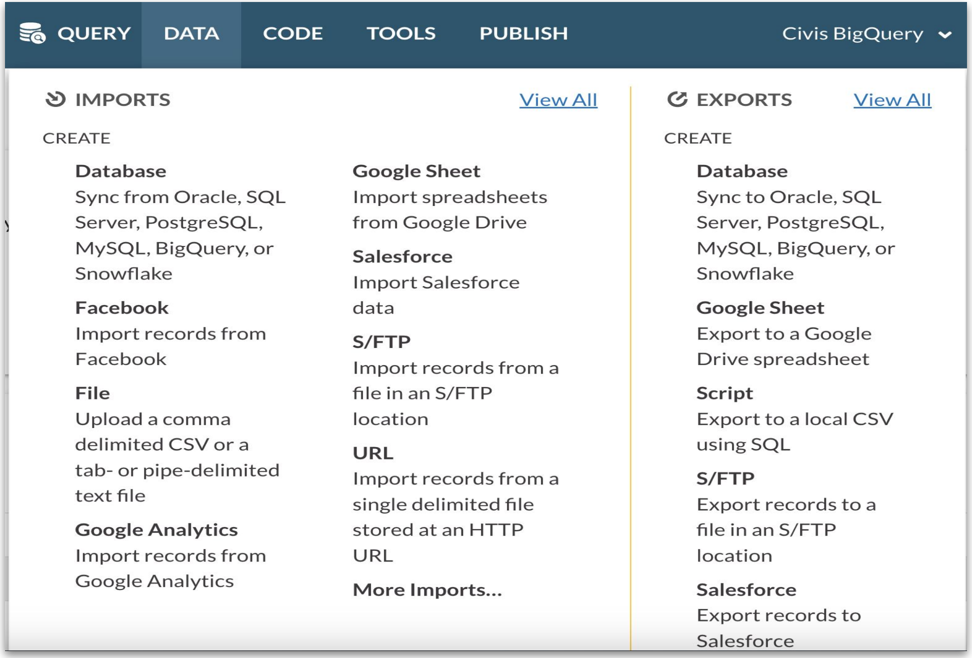


Imports and Exports

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

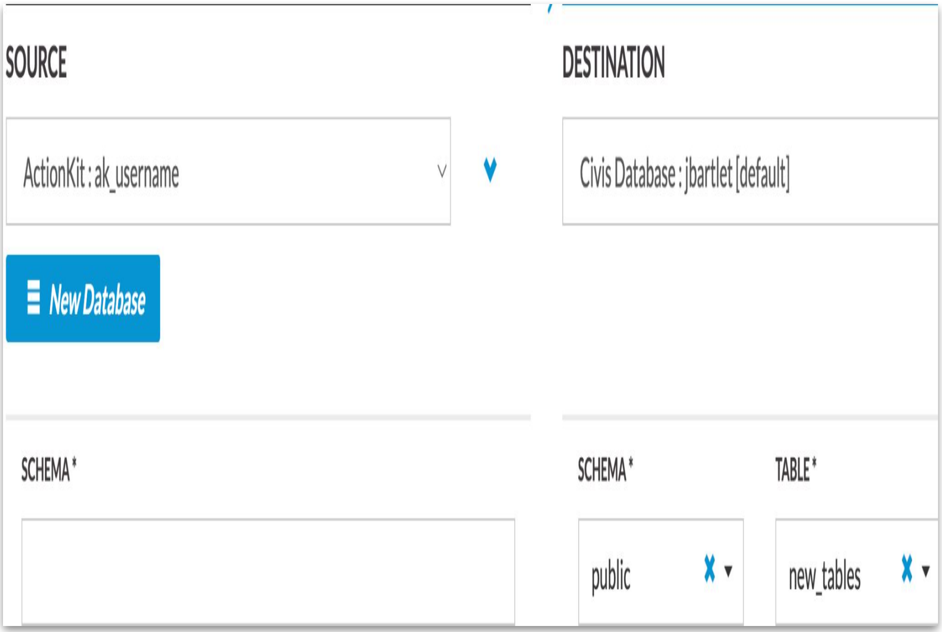


More information can be found in Civis Help Documentation: [Key Features]

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.

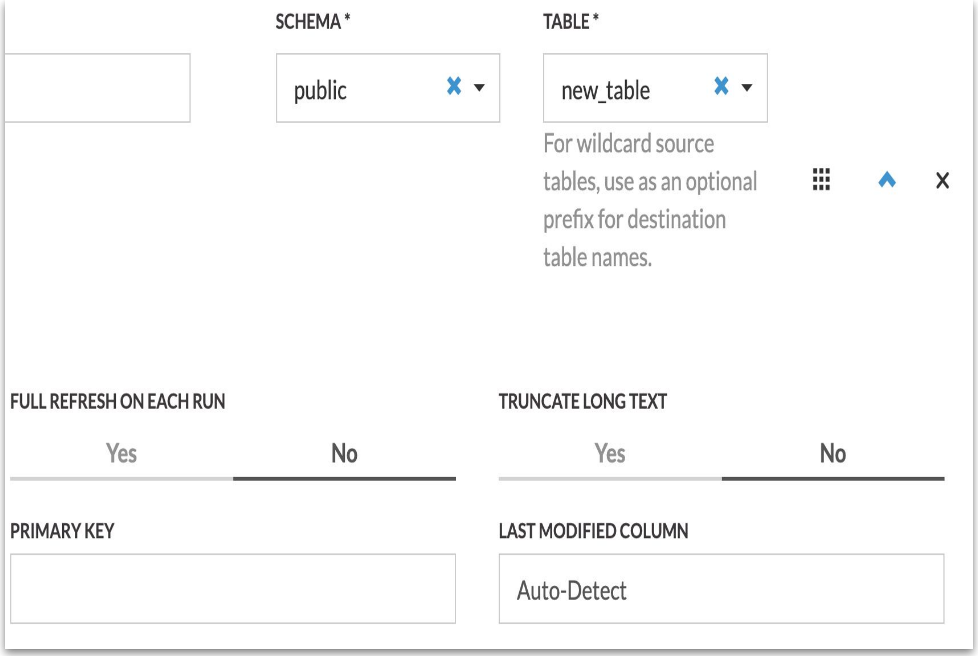


More information can be found in Civis Help Documentation: [Key Features]

Imports and Exports

Incremental Database Sync

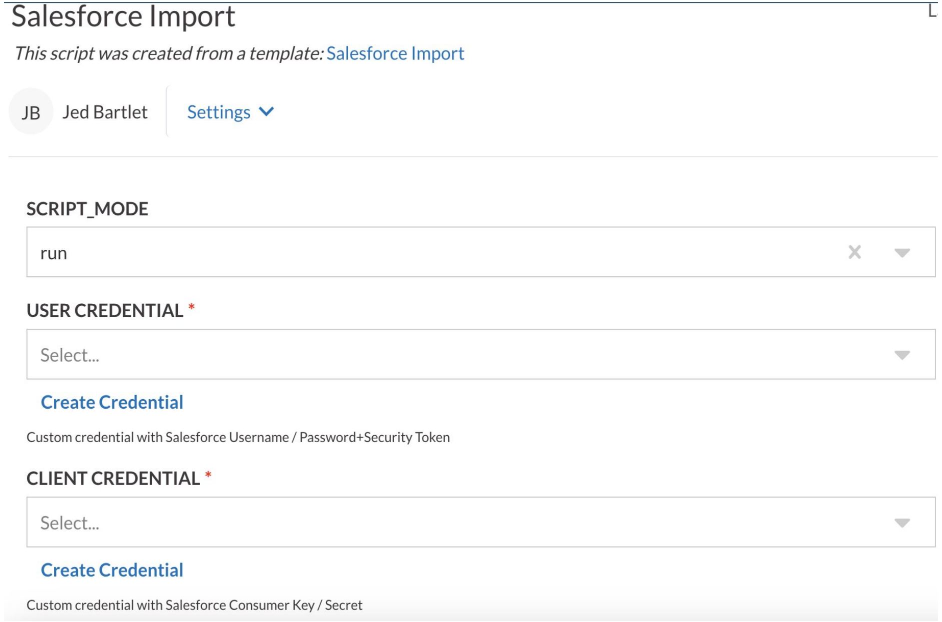
- A column is selected for the import to only pull rows where last_modified_column in the source >= last_modified_column in the destination. The default value is "Auto-Detect".
    - *When this is the case, the column name must contain "modif" or "update" as part of the name.*
- You can also specify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



Imports and Exports

Salesforce Import

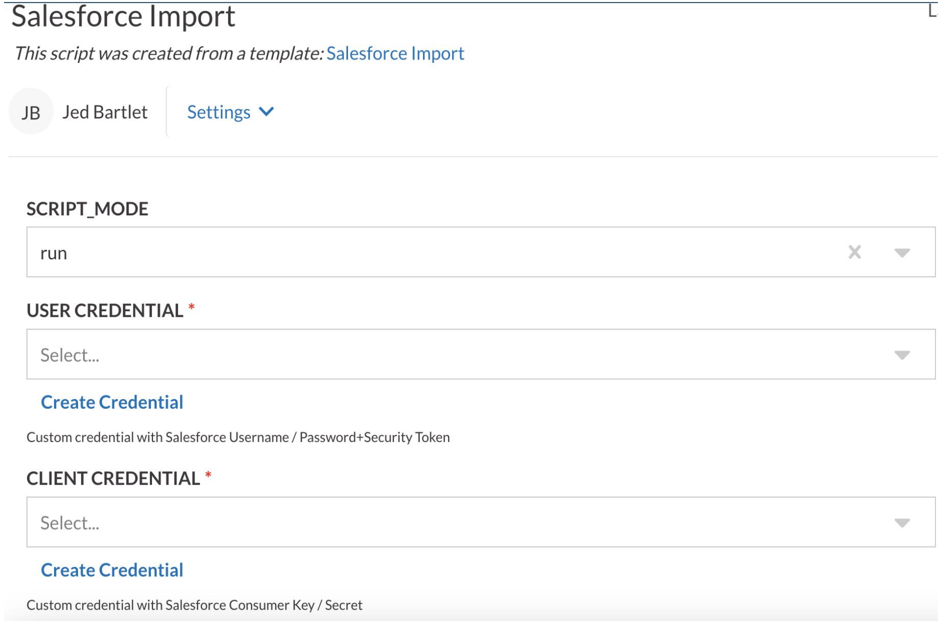
- There are 5 required parameters for the Salesforce Import and Export Jobs in Platform:
    - User Credential
    - Client Credential
    - Destination Database
    - Destination Database Credential
    - Destination Schema/Table



Imports and Exports

Salesforce Import

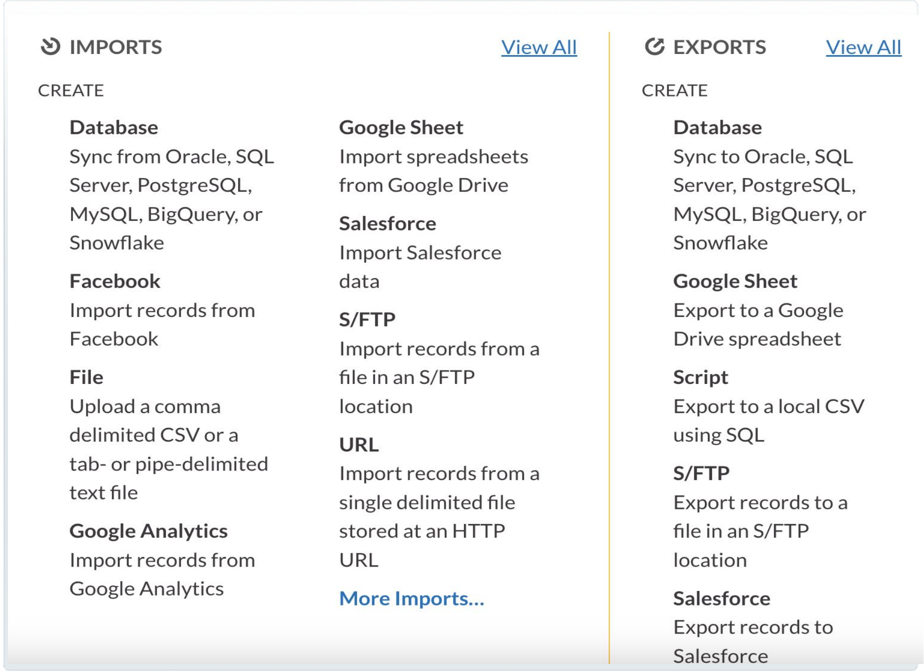
- There are many optional parameters for the Salesforce Import and Export Jobs in Platform including:
  - Salesforce Instance URL
  - Salesforce Object
  - SOQL Query
  - Incremental Sync?



Imports and Exports

Searching Additional Templates

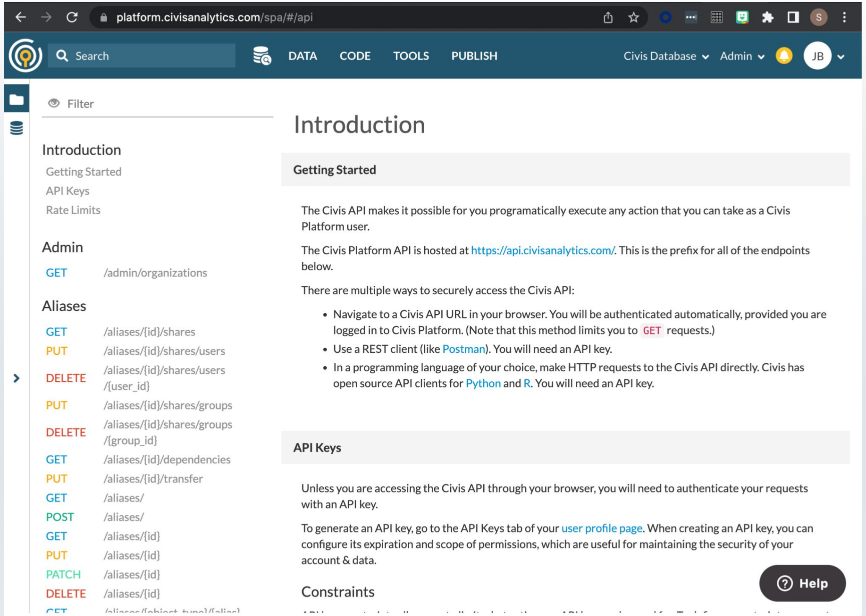
- You can search for additional templates created by the Civis Team in a few ways:
  - Use the Global Search Bar
  - Click on more Imports or Exports under the Data Tab
  - Click on more Templates under the Code tab



Imports 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 Civis API is hosted at https://api.civisanalytics.com/ — this is the prefix for all the endpoints



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/