



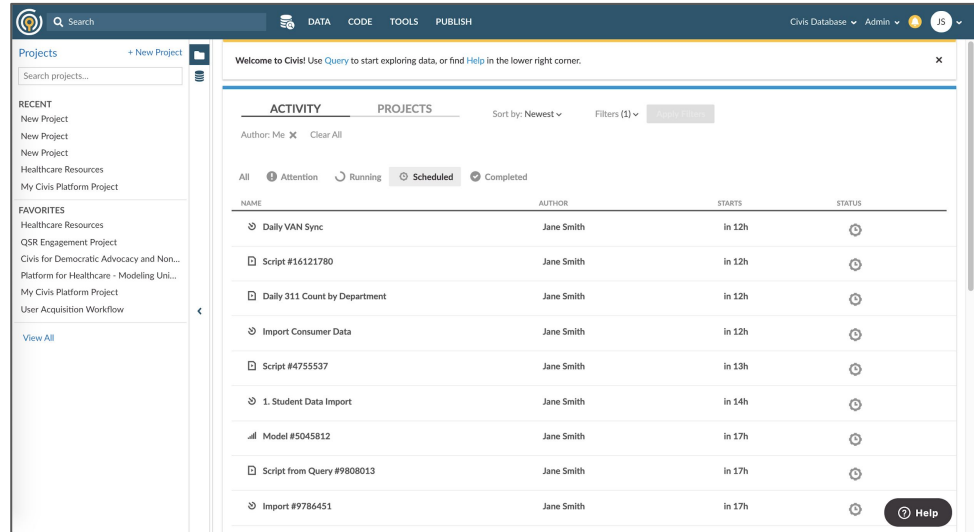
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Civis Platform 101

Goal of Civis Platform 101

In this training, we will discuss:

- how to navigate Civis Platform
- the basic Platform features
- where user can access help resources and contact Civis Client Support



The screenshot displays the Civis Platform interface. The top navigation bar includes a search bar, a menu icon, and tabs for DATA, CODE, TOOLS, and PUBLISH. The user is logged in as 'Admin' in the 'Civis Database' environment. The main content area shows a 'Projects' view with a table of project activity. The table has columns for NAME, AUTHOR, STARTS, and STATUS. The projects listed are:

NAME	AUTHOR	STARTS	STATUS
Daily VAN Sync	Jane Smith	In 12h	🔄
Script #16121780	Jane Smith	In 12h	🔄
Daily 311 Count by Department	Jane Smith	In 12h	🔄
Import Consumer Data	Jane Smith	In 12h	🔄
Script #4755537	Jane Smith	In 13h	🔄
1. Student Data Import	Jane Smith	In 14h	🔄
Model #5045812	Jane Smith	In 17h	🔄
Script from Query #9808013	Jane Smith	In 17h	🔄
Import #9786451	Jane Smith	In 17h	🔄

The interface also features a left sidebar with 'RECENT' and 'FAVORITES' sections, and a 'Help' button in the bottom right corner.

What is Civis Platform?

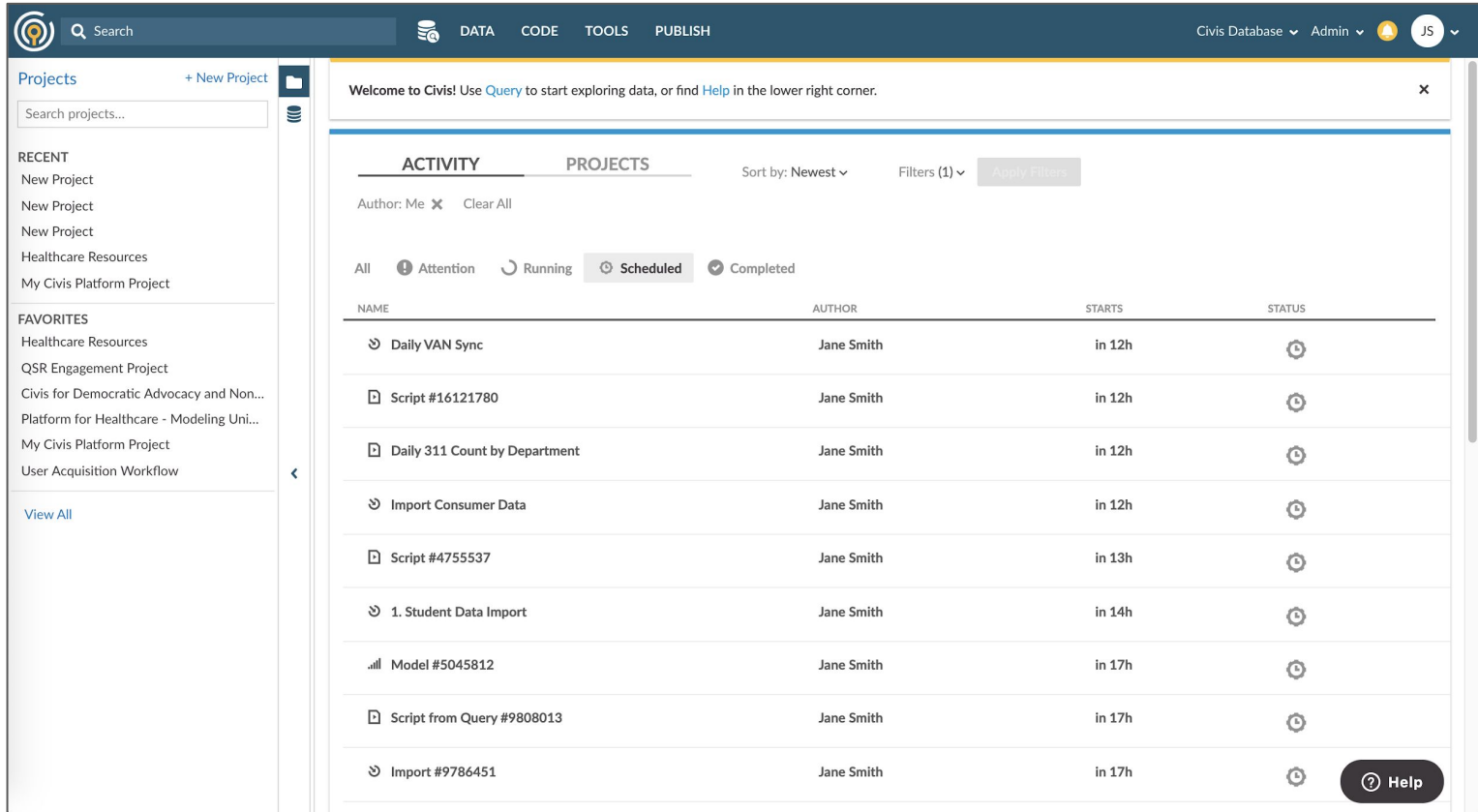
Civis Platform is a cloud-based data science software that allows users to:

- **ingest, clean, and enhance** data so it's complete and ready for analysis
- **explore** data and **collaborate** on analysis
- **finalize** and **automate** code into production
- **deploy** and **deliver** models, analysis and reports to key stakeholders



Navigating Civis Platform

Home Page





















The screenshot displays the Civis Platform interface. At the top, there is a dark navigation bar with the Civis logo, a search bar, and menu items for DATA, CODE, TOOLS, and PUBLISH. On the right side of the bar, it shows 'Civis Database', 'Admin', a notification bell, and the user 'JS'.

On the left, a sidebar contains a 'Projects' section with a '+ New Project' button and a search box. Below this are 'RECENT' and 'FAVORITES' sections, each listing various project names. A 'View All' link is at the bottom of the favorites section.

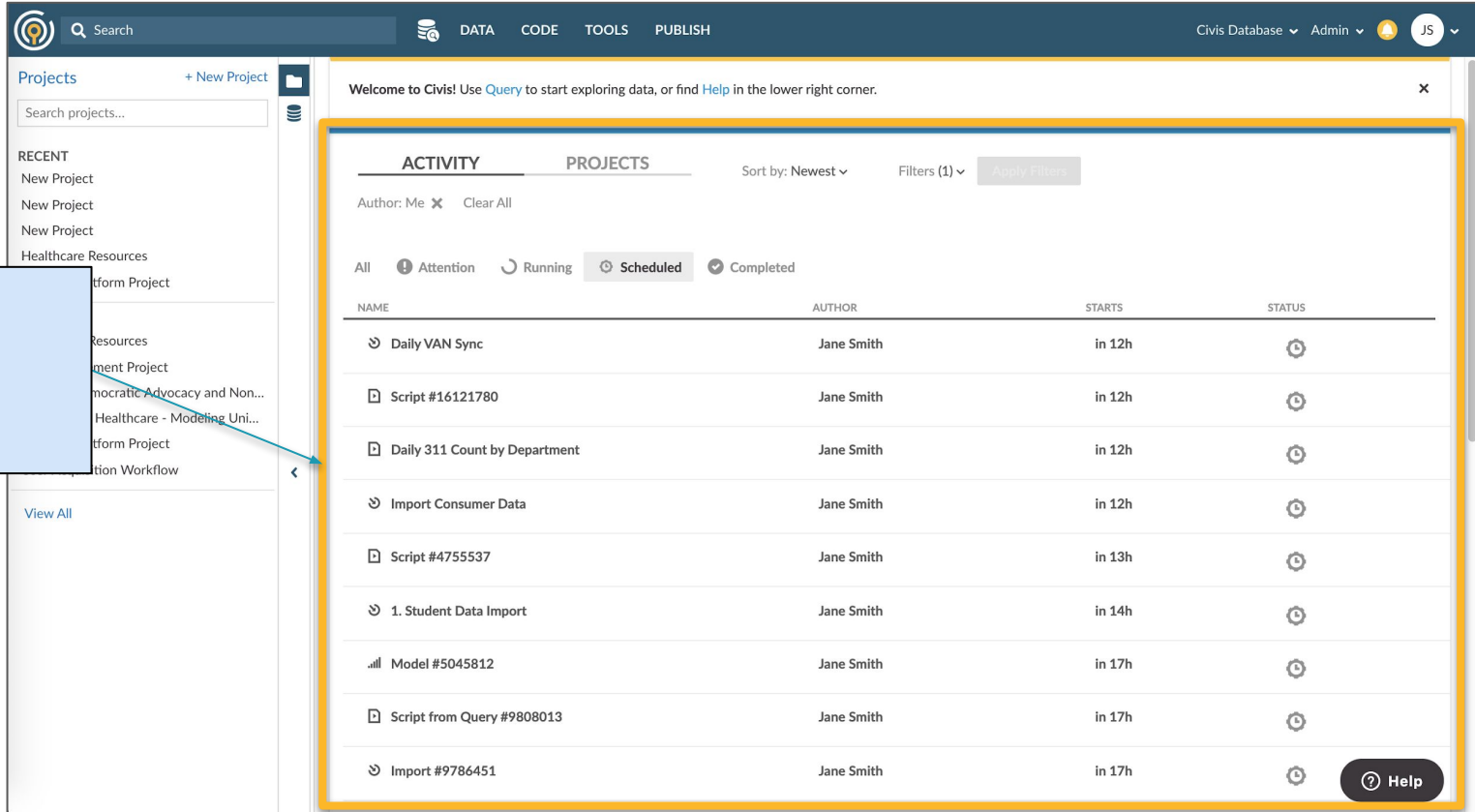
The main content area features a welcome message: 'Welcome to Civis! Use Query to start exploring data, or find Help in the lower right corner.' Below this is a 'PROJECTS' section with tabs for 'ACTIVITY' and 'PROJECTS'. It includes a 'Sort by: Newest' dropdown, a 'Filters (1)' dropdown, and an 'Apply Filters' button. The 'Author: Me' filter is active, with a 'Clear All' option.

Activity filters include 'All', 'Attention' (with a warning icon), 'Running' (with a refresh icon), 'Scheduled' (with a clock icon), and 'Completed' (with a checkmark icon). The 'Scheduled' filter is currently selected.

NAME	AUTHOR	STARTS	STATUS
 Daily VAN Sync	Jane Smith	in 12h	
 Script #16121780	Jane Smith	in 12h	
 Daily 311 Count by Department	Jane Smith	in 12h	
 Import Consumer Data	Jane Smith	in 12h	
 Script #4755537	Jane Smith	in 13h	
 1. Student Data Import	Jane Smith	in 14h	
 Model #5045812	Jane Smith	in 17h	
 Script from Query #9808013	Jane Smith	in 17h	
 Import #9786451	Jane Smith	in 17h	

A 'Help' button with a question mark icon is located in the bottom right corner of the main content area.

Navigating Civis Platform



Welcome to Civis! Use [Query](#) to start exploring data, or find [Help](#) in the lower right corner.

ACTIVITY **PROJECTS** Sort by: Newest ▾ Filters (1) ▾ [Apply Filters](#)

Author: Me ✕ Clear All

All Attention Running **Scheduled** Completed

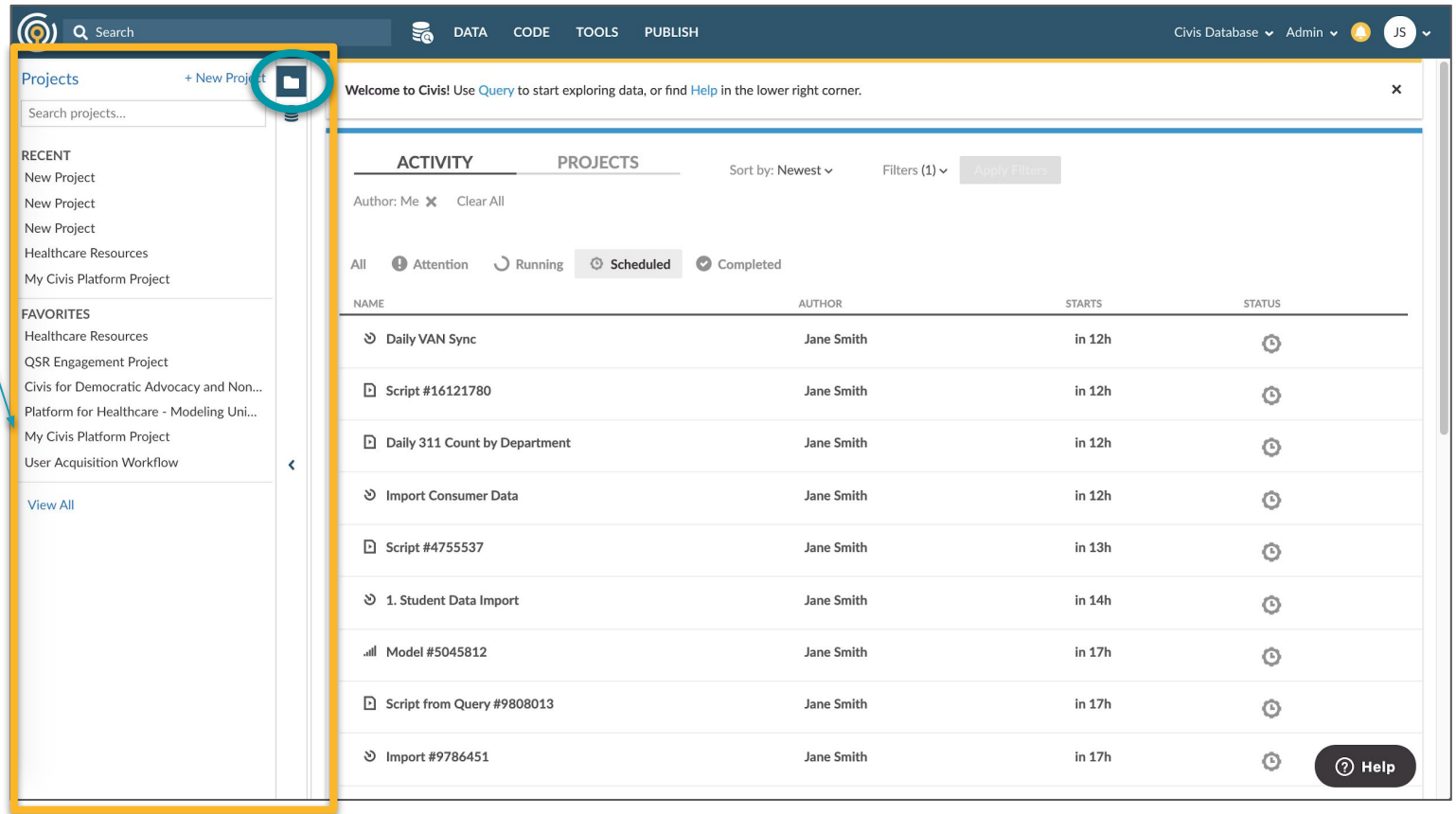
NAME	AUTHOR	STARTS	STATUS
Daily VAN Sync	Jane Smith	in 12h	
Script #16121780	Jane Smith	in 12h	
Daily 311 Count by Department	Jane Smith	in 12h	
Import Consumer Data	Jane Smith	in 12h	
Script #4755537	Jane Smith	in 13h	
1. Student Data Import	Jane Smith	in 14h	
Model #5045812	Jane Smith	in 17h	
Script from Query #9808013	Jane Smith	in 17h	
Import #9786451	Jane Smith	in 17h	

Help

Activity
A list of jobs from your organization and their statuses.

Navigating Civis Platform

Project Pane
 User-created collection of Civis objects.
 Use this pane to open recently viewed or favorited projects.



The screenshot shows the Civis Platform interface. On the left is the 'Project Pane' with a search bar and two sections: 'RECENT' and 'FAVORITES'. The 'RECENT' section lists: New Project, New Project, New Project, Healthcare Resources, and My Civis Platform Project. The 'FAVORITES' section lists: Healthcare Resources, QSR Engagement Project, Civis for Democratic Advocacy and Non..., Platform for Healthcare - Modeling Uni..., My Civis Platform Project, and User Acquisition Workflow. Below these is a 'View All' link. A blue circle highlights a folder icon in the top right of the Project Pane. The main area shows a 'Welcome to Civis!' message and a 'PROJECTS' table. The table has columns for NAME, AUTHOR, STARTS, and STATUS. It includes filters for 'Author: Me' and 'Clear All', and status filters for 'All', 'Attention', 'Running', 'Scheduled', and 'Completed'. The table lists 12 projects, all by Jane Smith, with various start times and status icons.

NAME	AUTHOR	STARTS	STATUS
Daily VAN Sync	Jane Smith	in 12h	
Script #16121780	Jane Smith	in 12h	
Daily 311 Count by Department	Jane Smith	in 12h	
Import Consumer Data	Jane Smith	in 12h	
Script #4755537	Jane Smith	in 13h	
1. Student Data Import	Jane Smith	in 14h	
Model #5045812	Jane Smith	in 17h	
Script from Query #9808013	Jane Smith	in 17h	
Import #9786451	Jane Smith	in 17h	

Navigating Civis Platform

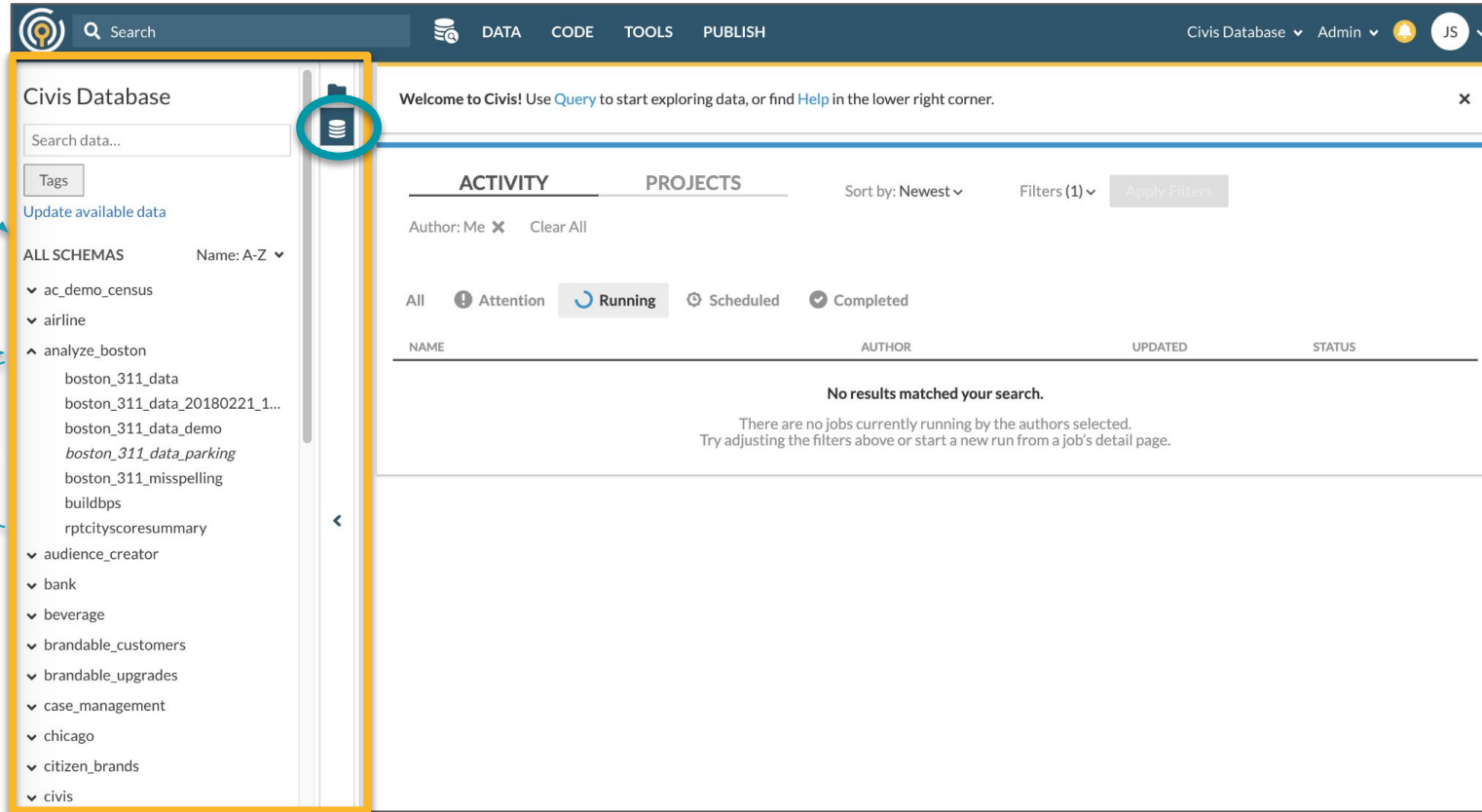
Data Pane

Find the schemas and tables that exist in your Redshift or PostgreSQL database.

Schema

Tables

Go to [Welcome to Data Catalog](#) for more information.



The screenshot shows the Civis Platform interface. On the left is the 'Data Pane' for the 'Civis Database'. It features a search bar, a 'Tags' button, and an 'Update available data' link. Below is a tree view of 'ALL SCHEMAS' with a 'Name: A-Z' dropdown. The 'analyze_boston' schema is expanded, showing a list of tables including 'boston_311_data', 'boston_311_data_20180221_1...', 'boston_311_data_demo', 'boston_311_data_parking', 'boston_311_misspelling', 'buildbps', and 'rptcityscoresummary'. Other schemas listed include 'audience_creator', 'bank', 'beverage', 'brandable_customers', 'brandable_upgrades', 'case_management', 'chicago', 'citizen_brands', and 'civis'. A blue circle highlights a database icon in the top right of the pane.

The main area displays a 'Welcome to Civis!' message and navigation tabs for 'ACTIVITY' and 'PROJECTS'. The 'ACTIVITY' tab is active, showing a filter for 'Author: Me' and a 'Clear All' button. Below are status filters for 'All', 'Attention', 'Running', 'Scheduled', and 'Completed'. A table header is visible with columns for 'NAME', 'AUTHOR', 'UPDATED', and 'STATUS'. The table content is empty, with a message: 'No results matched your search. There are no jobs currently running by the authors selected. Try adjusting the filters above or start a new run from a job's detail page.'

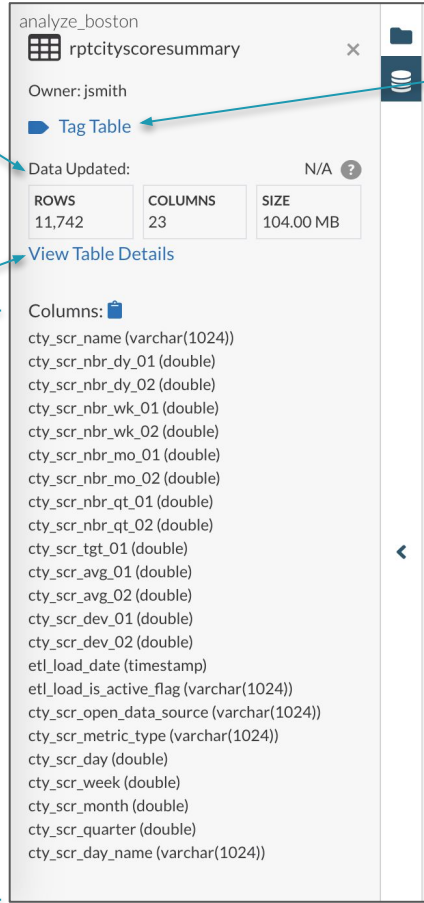
Navigating Civis Platform

Data Pane
Click on a table's name to view more information about the table.

Time Last Updated
Click [here](#) for more info.

View Table Details
View column descriptions and sample rows

Columns



analyze_boston
rptcityscoresummary

Owner: jsmith

Tag Table

Data Updated: N/A ?

ROWS	COLUMNS	SIZE
11,742	23	104.00 MB

View Table Details

Columns:

- cty_scr_name (varchar(1024))
- cty_scr_nbr_dy_01 (double)
- cty_scr_nbr_dy_02 (double)
- cty_scr_nbr_wk_01 (double)
- cty_scr_nbr_wk_02 (double)
- cty_scr_nbr_mo_01 (double)
- cty_scr_nbr_mo_02 (double)
- cty_scr_nbr_qt_01 (double)
- cty_scr_nbr_qt_02 (double)
- cty_scr_tgt_01 (double)
- cty_scr_avg_01 (double)
- cty_scr_avg_02 (double)
- cty_scr_dev_01 (double)
- cty_scr_dev_02 (double)
- etl_load_date (timestamp)
- etl_load_is_active_flag (varchar(1024))
- cty_scr_open_data_source (varchar(1024))
- cty_scr_metric_type (varchar(1024))
- cty_scr_day (double)
- cty_scr_week (double)
- cty_scr_month (double)
- cty_scr_quarter (double)
- cty_scr_day_name (varchar(1024))

Table Tags
See [Introduction to Table Tags](#) for more info.

Navigating Civis Platform



Search

Actions

Cluster

Navigation Bar
Click on each **Action** to get more details and instruction.

Click the **Cluster** dropdown to select the database you wish to interact with.



→ Access Query Pane



→ Create Imports & Exports



→ Create Notebooks & Scripts, Access Script Templates




→ Create Workflows, Use Data Enhancements



→ Create Reports, Deploy Services

↑
Click for Platform Updates & Release Notes

Civis Platform Help Resources

  DATA CODE TOOLS PUBLISH Civis Database Admin JS

Civis Help Center
To learn more about Civis Platform and access Platform documentation, click **Help** in the **My Profile** dropdown menu.

QUICK ASSUME ROLE	Resume Original Role
<i>Most recently assumed users will appear here</i>	Enable Superadmin Mode
	My Profile
	Remote Hosts
	API Docs
	Exit Demo Mode
	Help
	Preferences
View All Users	Sign Out



Civis Platform Help Resources

CIVIS
ANALYTICS

Search

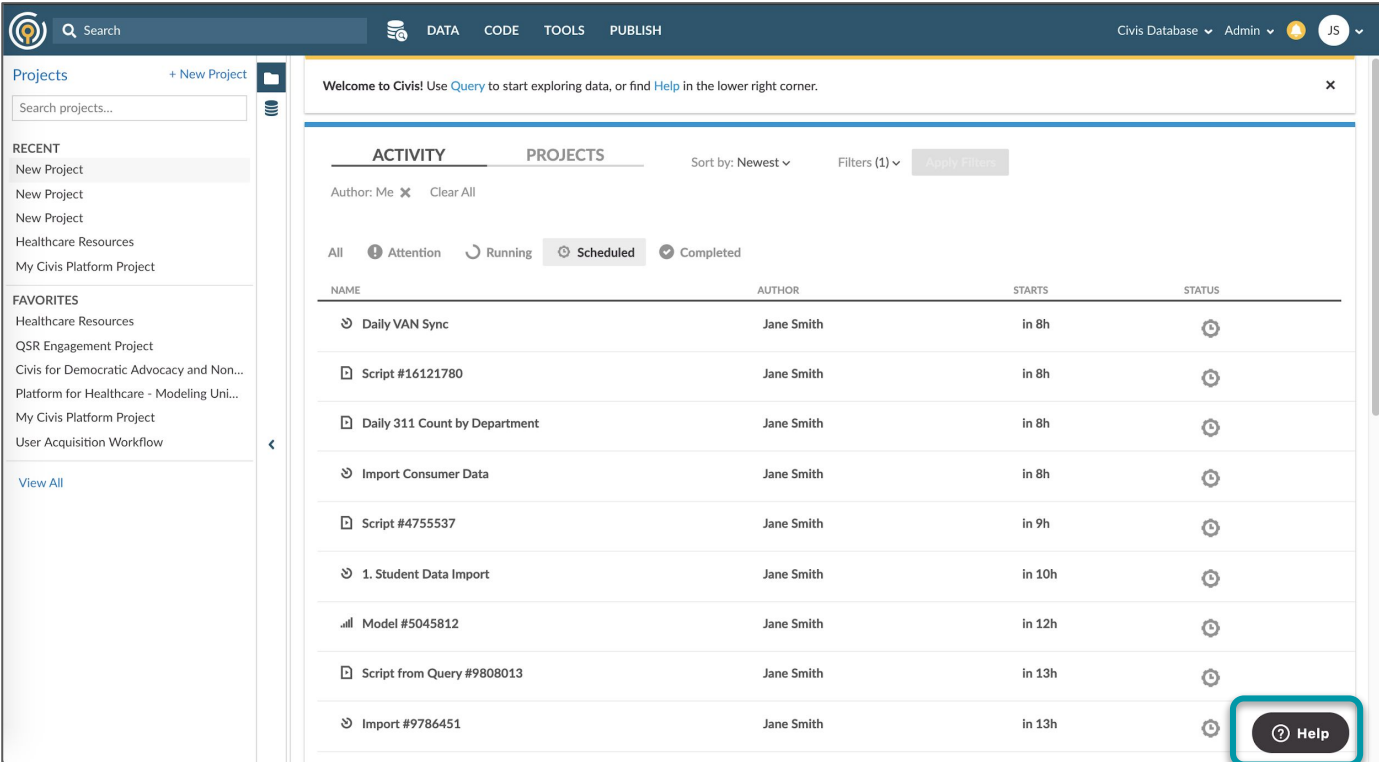
Joseph Loffredo

M-DIVE Help Center Please use the help center articles below for M-DIVE training and support resources	Troubleshooting Docs	Athena - Media Mix
Research Library	Sparklight	Identity Resolution
API	Data Products	Enhancements
Exports	General	Imports
Models	Notebooks	Projects
Query	Redshift and Postgres	Reports

Civis Platform Help Resources

Contacting Civis Tech Support
If you need assistance, email Client Support at support@civisanalytics.com.

You can also submit support tickets using the **Help Widget!**



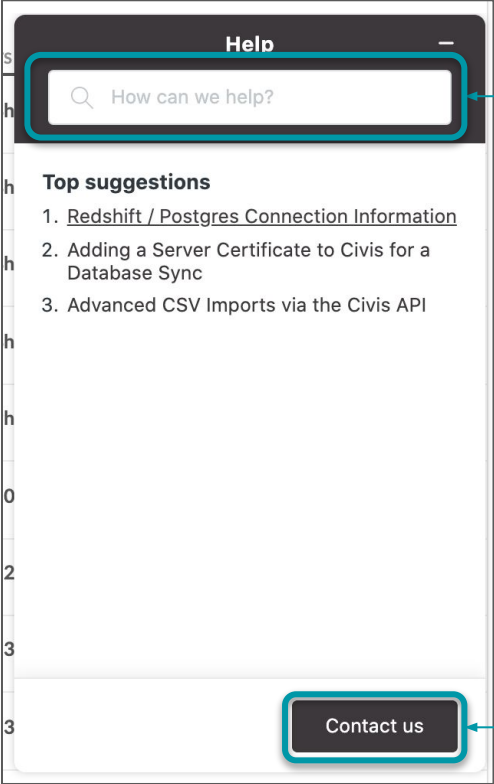
The screenshot shows the Civis Platform interface. At the top, there is a navigation bar with 'DATA', 'CODE', 'TOOLS', and 'PUBLISH' tabs. A search bar is on the left, and user information 'Civis Database Admin JS' is on the right. Below the navigation bar, there is a 'Projects' sidebar with a search box and lists of 'RECENT' and 'FAVORITES' projects. The main area displays a 'Welcome to Civis!' message and a table of project activities. The table has columns for NAME, AUTHOR, STARTS, and STATUS. The activities listed include 'Daily VAN Sync', 'Script #16121780', 'Daily 311 Count by Department', 'Import Consumer Data', 'Script #4755537', '1. Student Data Import', 'Model #5045812', 'Script from Query #9808013', and 'Import #9786451'. A 'Help' widget is visible in the bottom right corner, highlighted with a red box.

NAME	AUTHOR	STARTS	STATUS
🔄 Daily VAN Sync	Jane Smith	in 8h	⚙️
📄 Script #16121780	Jane Smith	in 8h	⚙️
📄 Daily 311 Count by Department	Jane Smith	in 8h	⚙️
🔄 Import Consumer Data	Jane Smith	in 8h	⚙️
📄 Script #4755537	Jane Smith	in 9h	⚙️
🔄 1. Student Data Import	Jane Smith	in 10h	⚙️
📊 Model #5045812	Jane Smith	in 12h	⚙️
📄 Script from Query #9808013	Jane Smith	in 13h	⚙️
🔄 Import #9786451	Jane Smith	in 13h	⚙️

Civis Platform Help Resources

Help Widget
When searching common issues in the Help Widget, you can view our Help Center documentation right in Civis Platform.

If you need assistance from Client Support, click **Contact Us**.



Search common issues

Contact Client Support



Platform Journey



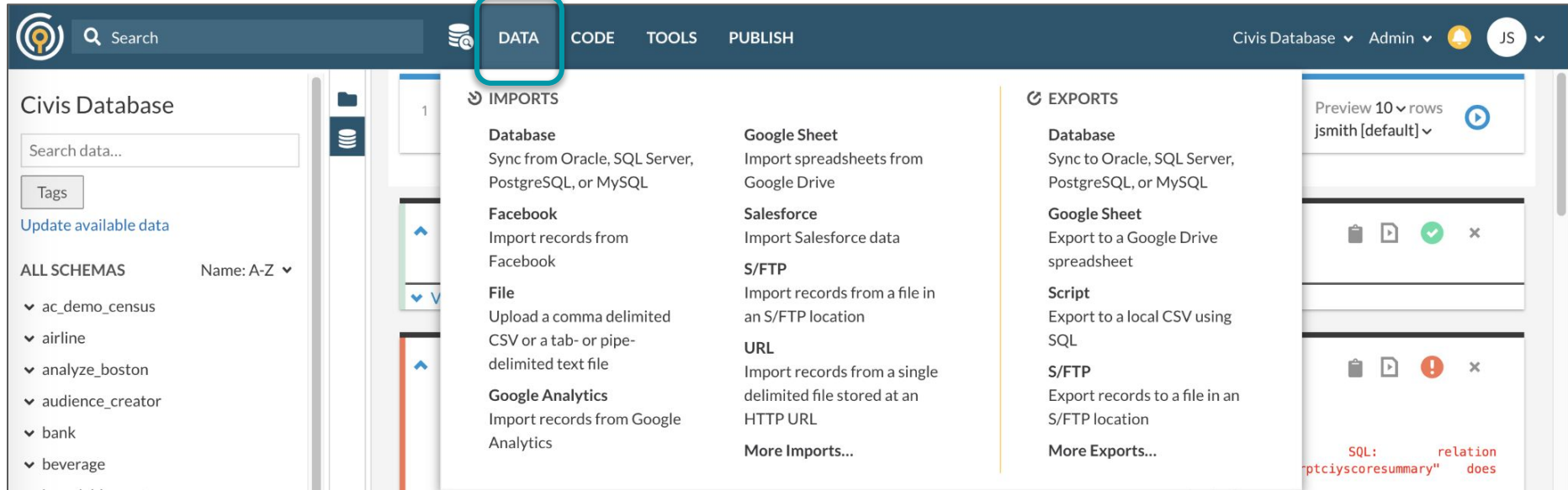
- Imports
- Civis-built Script Templates

- Data Pane
- Query Pane

- Scripts
- Notebooks
- Enhancements
- Workflows
- Exports

- HTML
- Tableau
- Civis Services
- Google Data Studio

Sending Data to Civis Platform



The screenshot shows the Civis platform interface. At the top, there is a dark blue navigation bar with the Civis logo on the left, a search bar, and navigation tabs for DATA, CODE, TOOLS, and PUBLISH. The 'DATA' tab is highlighted with a red box. On the right side of the navigation bar, there are dropdown menus for 'Civis Database', 'Admin', a notification bell, and a user profile 'JS'.

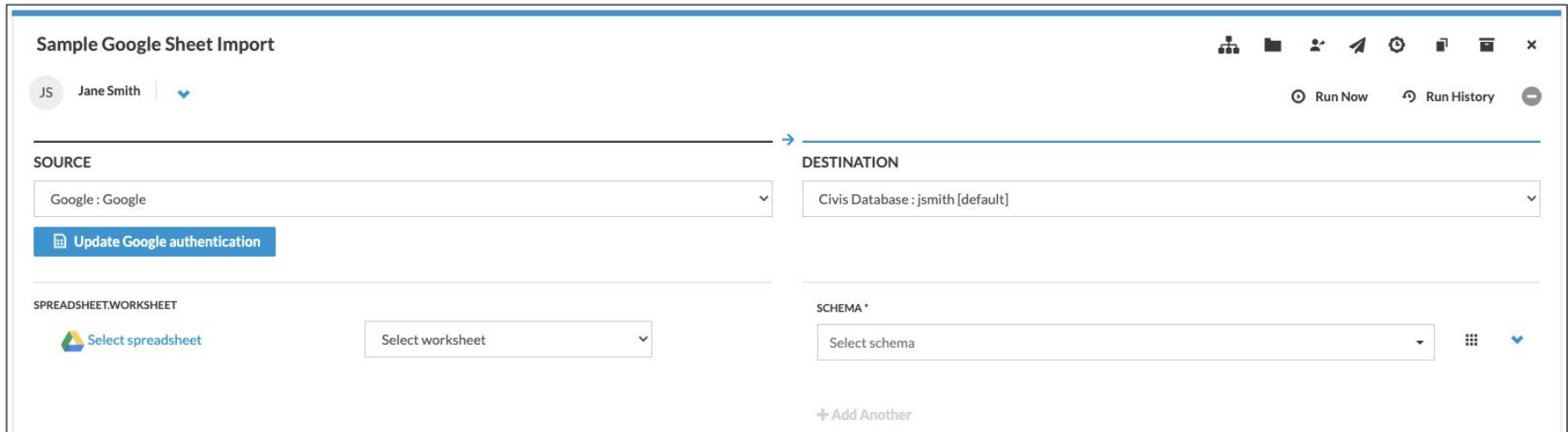
Below the navigation bar, the interface is divided into several sections:

- Civis Database:** A search bar with the text 'Search data...', a 'Tags' button, and a link to 'Update available data'. Below this is a list of 'ALL SCHEMAS' with a 'Name: A-Z' dropdown. The list includes:
 - ac_demo_census
 - airline
 - analyze_boston
 - audience_creator
 - bank
 - beverage
- IMPORTS:** A section with a sub-header 'IMPORTS' and several options:
 - Database:** Sync from Oracle, SQL Server, PostgreSQL, or MySQL
 - 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:** A section with a sub-header 'EXPORTS' and several options:
 - Database:** Sync to Oracle, SQL Server, PostgreSQL, or MySQL
 - 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
 - More Exports...**
- Preview:** A panel on the right showing 'Preview 10 rows' for 'jsmith [default]'. It contains two rows of data with icons for copy, print, refresh, and close. The first row has a green checkmark icon, and the second row has a red exclamation mark icon. Below the preview, there is a red error message: 'SQL: relation "ptciyscoresummary" does not exist'.

Sending Data to Civis Platform

Imports

- Database
- Google Sheet
- File
- Facebook Page Insights
- Google Analytics
- S/FTP



The screenshot displays the 'Sample Google Sheet Import' configuration window. At the top left, the title 'Sample Google Sheet Import' is shown, along with a user profile for 'Jane Smith' and a dropdown arrow. On the top right, there is a toolbar with icons for users, folders, a search icon, a refresh icon, a settings icon, a document icon, and a close icon. Below the toolbar are two buttons: 'Run Now' and 'Run History'.

The main configuration area is divided into two columns by a blue arrow pointing from left to right. The left column is labeled 'SOURCE' and contains a dropdown menu with 'Google : Google' selected. Below this is a blue button labeled 'Update Google authentication'. The right column is labeled 'DESTINATION' and contains a dropdown menu with 'Civis Database : jsmith [default]' selected.

Below the 'SOURCE' section is a section labeled 'SPREADSHEET.WORKSHEET' with a 'Select spreadsheet' button and a 'Select worksheet' dropdown menu. Below the 'DESTINATION' section is a section labeled 'SCHEMA *' with a 'Select schema' dropdown menu and a grid icon.

At the bottom center of the interface is a '+ Add Another' button.

Sending Data to Civis Platform

Script Templates

With script templates, you can work with vendors like:

- NGPVAN
- MobileCommons
- Google BigQuery
- AWS S3
- Hustle
- Facebook

Import from Facebook

Last Updated 08/13/2021 5:02:29 PM

This script was created from a template: Import from Facebook

JS Jane Smith Settings

History Run

Import records from Facebook. If you haven't added your Facebook credential to Civis, follow the [instructions here](#).

Notes

- Specify either a number of days to pull records from in the Days field or a date range using the Start Date and End Date fields.
- This import produces a lot of data. There are currently 245 metrics, with lifetime, weekly, and daily breakdowns. For your first run we recommend pulling records from just one day.
- Large requests break Facebook's servers. If your import fails, try again with a smaller time range.

FACEBOOK CREDENTIAL *

Select...

[Create Credential](#)

Select the Civis Custom Credential for Facebook

DESTINATION DATABASE *



Specify the database in which the data should be stored.

DESTINATION SCHEMA AND TABLE FOR FACEBOOK POST BASIC INFO *

Specify the schema and table name you would like to import the basic information about each post into, e.g. 'schema.table'.

Explore

Query Pane

 Search  DATA CODE TOOLS PUBLISH Civis Database Admin JS

Civis Database

Search data...

Tags

Update available data

ALL SCHEMAS Name: A-Z

- ac_demo_census
- airline
- analyze_boston
- audience_creator
- bank
- beverage
- brandable_customers
- brandable_upgrades
- case_management
- chicago
- citizen_brands
- civis
- commercial_demo
- customers

```
1 select * from analyze_boston.rptcityscoresummary;
```

Preview 10 rows
jsmith [default]

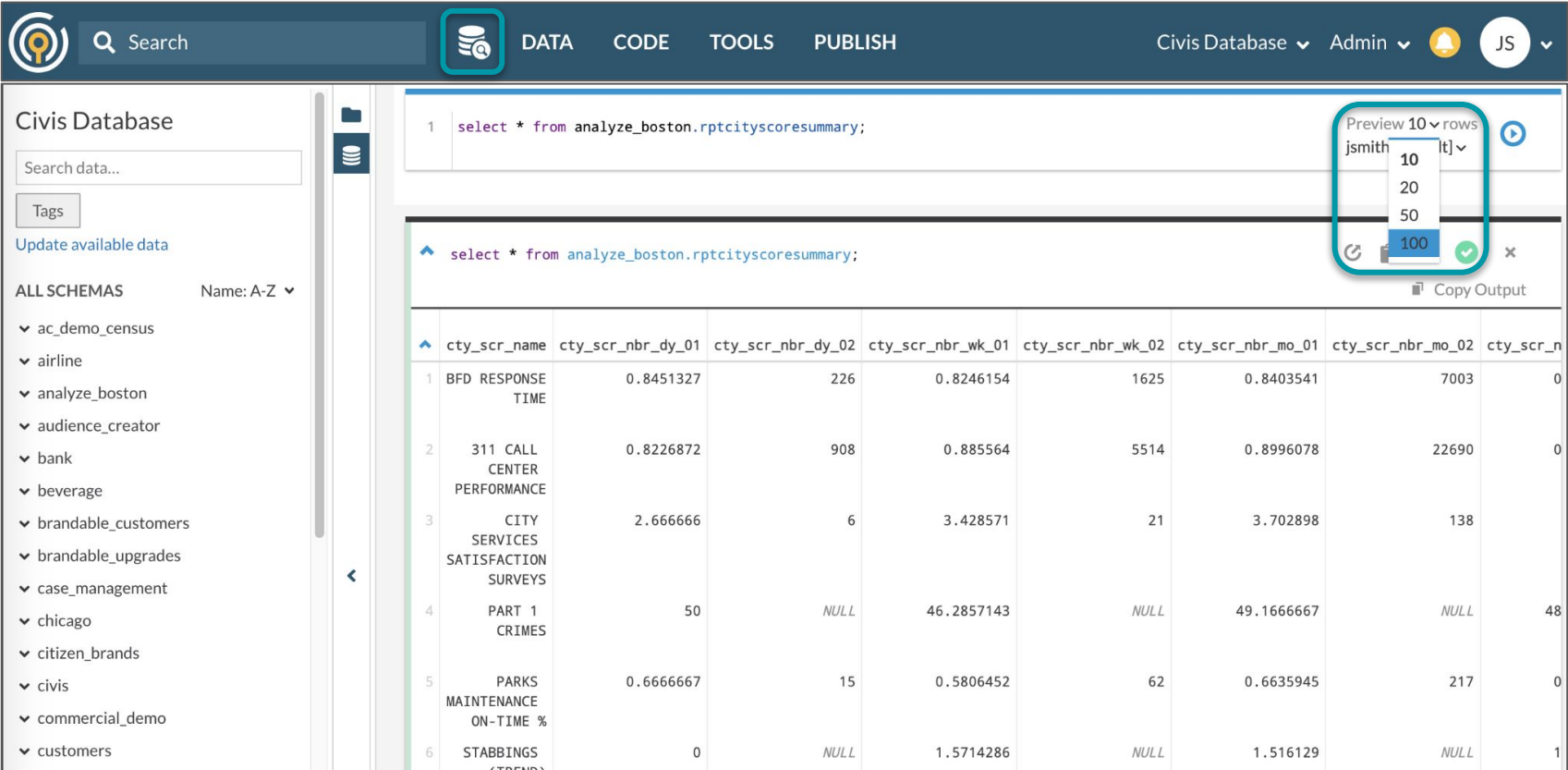
```
select * from analyze_boston.rptcityscoresummary;
```

Copy Output

	cty_scr_name	cty_scr_nbr_dy_01	cty_scr_nbr_dy_02	cty_scr_nbr_wk_01	cty_scr_nbr_wk_02	cty_scr_nbr_mo_01	cty_scr_nbr_mo_02	cty_scr_n
1	BFD RESPONSE TIME	0.8451327	226	0.8246154	1625	0.8403541	7003	0
2	311 CALL CENTER PERFORMANCE	0.8226872	908	0.885564	5514	0.8996078	22690	0
3	CITY SERVICES SATISFACTION SURVEYS	2.666666	6	3.428571	21	3.702898	138	
4	PART 1 CRIMES	50	NULL	46.2857143	NULL	49.1666667	NULL	48
5	PARKS MAINTENANCE ON-TIME %	0.6666667	15	0.5806452	62	0.6635945	217	0
6	STABBINGS (TRENDS)	0	NULL	1.5714286	NULL	1.516129	NULL	1

Explore

Query Pane



The screenshot shows the 'Explore' interface with a 'Query Pane' on the right. The top navigation bar includes 'DATA', 'CODE', 'TOOLS', and 'PUBLISH' tabs, with 'DATA' selected. The user is logged in as 'jsmith'. The query being executed is:



```
1 select * from analyze_boston.rptcityscoresummary;
```

The results are displayed in a table with the following columns: `cty_scr_name`, `cty_scr_nbr_dy_01`, `cty_scr_nbr_dy_02`, `cty_scr_nbr_wk_01`, `cty_scr_nbr_wk_02`, `cty_scr_nbr_mo_01`, `cty_scr_nbr_mo_02`, and `cty_scr_n`. A 'Preview 10 rows' dropdown menu is open, showing options for 10, 20, 50, and 100 rows, with 100 selected. The table contains 6 rows of data:

	cty_scr_name	cty_scr_nbr_dy_01	cty_scr_nbr_dy_02	cty_scr_nbr_wk_01	cty_scr_nbr_wk_02	cty_scr_nbr_mo_01	cty_scr_nbr_mo_02	cty_scr_n
1	BFD RESPONSE TIME	0.8451327	226	0.8246154	1625	0.8403541	7003	0
2	311 CALL CENTER PERFORMANCE	0.8226872	908	0.885564	5514	0.8996078	22690	0
3	CITY SERVICES SATISFACTION SURVEYS	2.666666	6	3.428571	21	3.702898	138	
4	PART 1 CRIMES	50	NULL	46.2857143	NULL	49.1666667	NULL	48
5	PARKS MAINTENANCE ON-TIME %	0.6666667	15	0.5806452	62	0.6635945	217	0
6	STABBINGS (TRENDS)	0	NULL	1.5714286	NULL	1.516129	NULL	1

Explore

Query Pane

 Search  DATA CODE TOOLS PUBLISH Civis Database Admin JS

Civis Database

Search data...

Tags

Update available data

ALL SCHEMAS Name: A-Z

- ac_demo_census
- airline
- analyze_boston
- audience_creator
- bank
- beverage
- brandable_customers
- brandable_upgrades
- case_management
- chicago
- citizen_brands
- civis
- commercial_demo
- customers

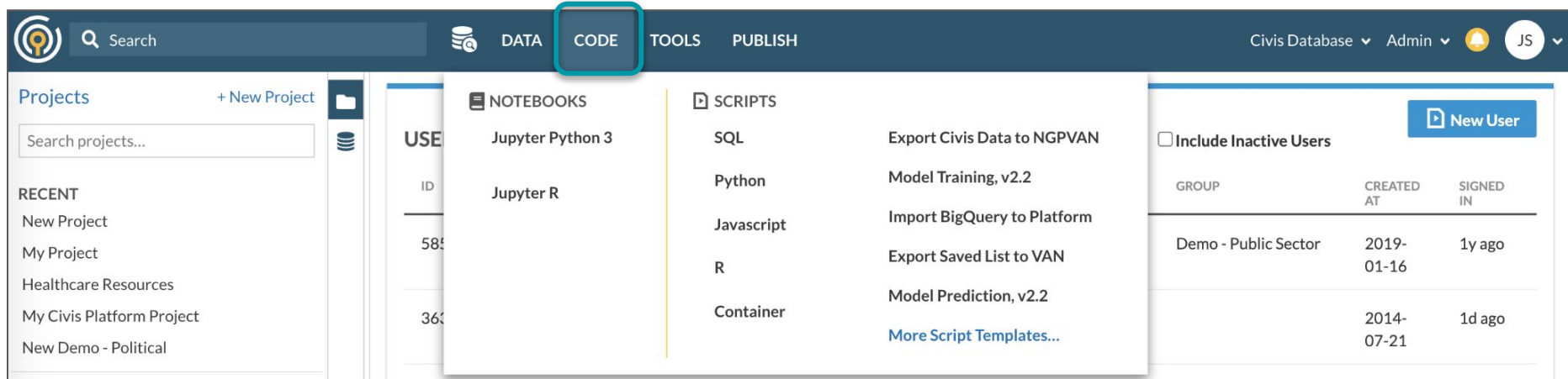
```
1 select * from analyze_boston.rptcityscoresummary;
```

Preview 10 rows
jsmith [default]

```
select * from analyze_boston.rptcityscoresummary;
```

	cty_scr_name	cty_scr_nbr_dy_01	cty_scr_nbr_dy_02	cty_scr_nbr_wk_01	cty_scr_nbr_wk_02	cty_scr_nbr_mo_01	cty_scr_nbr_mo_02	cty_scr_n
1	BFD RESPONSE TIME	0.8451327	226	0.8246154	1625	0.8403541	7003	0
2	311 CALL CENTER PERFORMANCE	0.8226872	908	0.885564	5514	0.8996078	22690	0
3	CITY SERVICES SATISFACTION SURVEYS	2.666666	6	3.428571	21	3.702898	138	
4	PART 1 CRIMES	50	NULL	46.2857143	NULL	49.1666667	NULL	48
5	PARKS MAINTENANCE ON-TIME %	0.6666667	15	0.5806452	62	0.6635945	217	0
6	STABBINGS (TRENDS)	0	NULL	1.5714286	NULL	1.516129	NULL	1

Analyze & Transform Data



The screenshot displays the Civis platform interface. The top navigation bar features a search bar, a 'DATA' icon, and tabs for 'DATA', 'CODE' (highlighted with a red box), 'TOOLS', and 'PUBLISH'. The right side of the navigation bar shows 'Civis Database', 'Admin', a notification bell, and a user profile for 'JS'.

The main content area is divided into several sections:

- Projects:** A sidebar on the left with a search bar and a list of recent projects: 'New Project', 'My Project', 'Healthcare Resources', 'My Civis Platform Project', and 'New Demo - Political'.
- NOTEBOOKS:** A central section with a 'USE' dropdown and a list of notebooks: 'Jupyter Python 3' and 'Jupyter R'.
- SCRIPTS:** A section on the right with a list of script templates: 'Export Civis Data to NGPVAN', 'Model Training, v2.2', 'Import BigQuery to Platform', 'Export Saved List to VAN', 'Model Prediction, v2.2', and a link for 'More Script Templates...'.
- User Management:** A panel on the far right with a 'New User' button and a table of users.

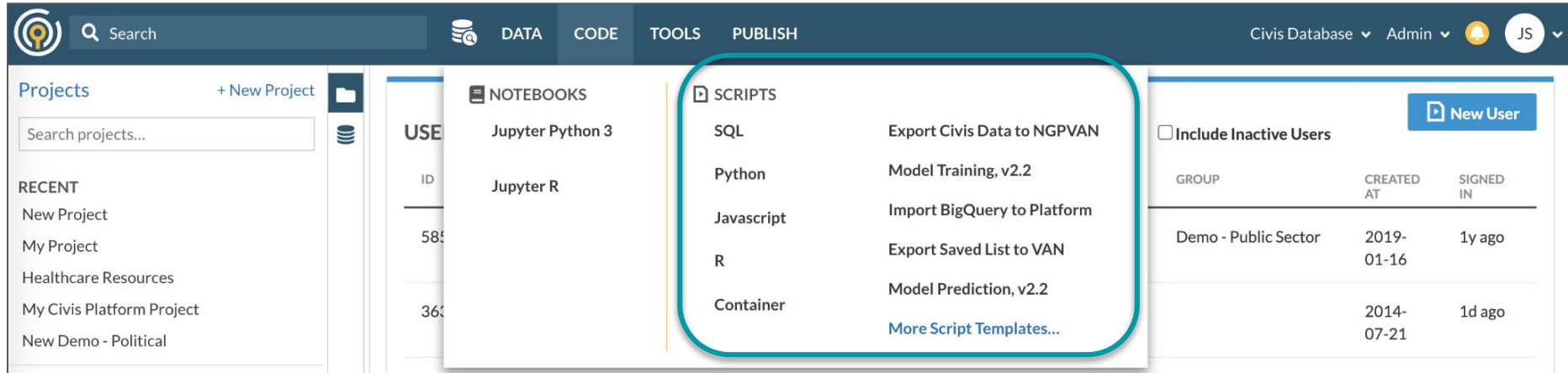
The 'Include Inactive Users' checkbox is unchecked. The user table has the following data:

GROUP	CREATED AT	SIGNED IN
Demo - Public Sector	2019-01-16	1y ago
	2014-07-21	1d ago

Analyze & Transform Data

Scripts

Scripts enable users to query, modify, import and export data using: SQL, R, Python, Javascript, or Container.



The screenshot shows the Civis platform interface with the 'SCRIPTS' menu highlighted. The interface includes a top navigation bar with 'DATA', 'CODE', 'TOOLS', and 'PUBLISH' tabs. The 'SCRIPTS' menu is open, showing a list of script categories and their corresponding actions.

SCRIPTS	Actions
SQL	Export Civis Data to NGPVAN
Python	Model Training, v2.2
Javascript	Import BigQuery to Platform
R	Export Saved List to VAN
Container	Model Prediction, v2.2
	More Script Templates...



Other visible elements in the interface include:

- Projects:** Search projects... (New Project button)
- RECENT:** New Project, My Project, Healthcare Resources, My Civis Platform Project, New Demo - Political
- NOTEBOOKS:** Jupyter Python 3, Jupyter R
- Users Table:**


GROUP	CREATED AT	SIGNED IN
Demo - Public Sector	2019-01-16	1y ago
	2014-07-21	1d ago
- Buttons:** New User, Include Inactive Users

Analyze & Transform Data


Scripts

 Search
Civis Database ▾ Admin ▾  JS ▾

airline

 bookings ✕


Owner: jsmith

 Tag Table

Data Updated: N/A ?

ROWS	COLUMNS	SIZE
13,000	13	64.00 MB

[View Table Details](#)

Columns: 

ticket_id (integer)

fname (varchar(1024))

mname (varchar(1024))

lname (varchar(1024))

address (varchar(1024))

city (varchar(1024))

state (varchar(1024))

zip (varchar(1024))

email (varchar(1024))

phone (varchar(1024))




ticket_price (numeric(8,2))

origin (varchar(4))

destination (varchar(4))

Sample SQL Script Last Updated 08/04/2021 3:38:44 PM ⋮

JS Jane Smith Settings ▾

 Manage Versions
 Set Parameters
 Publish as Template

- History
Run

DATABASE
Civis Database

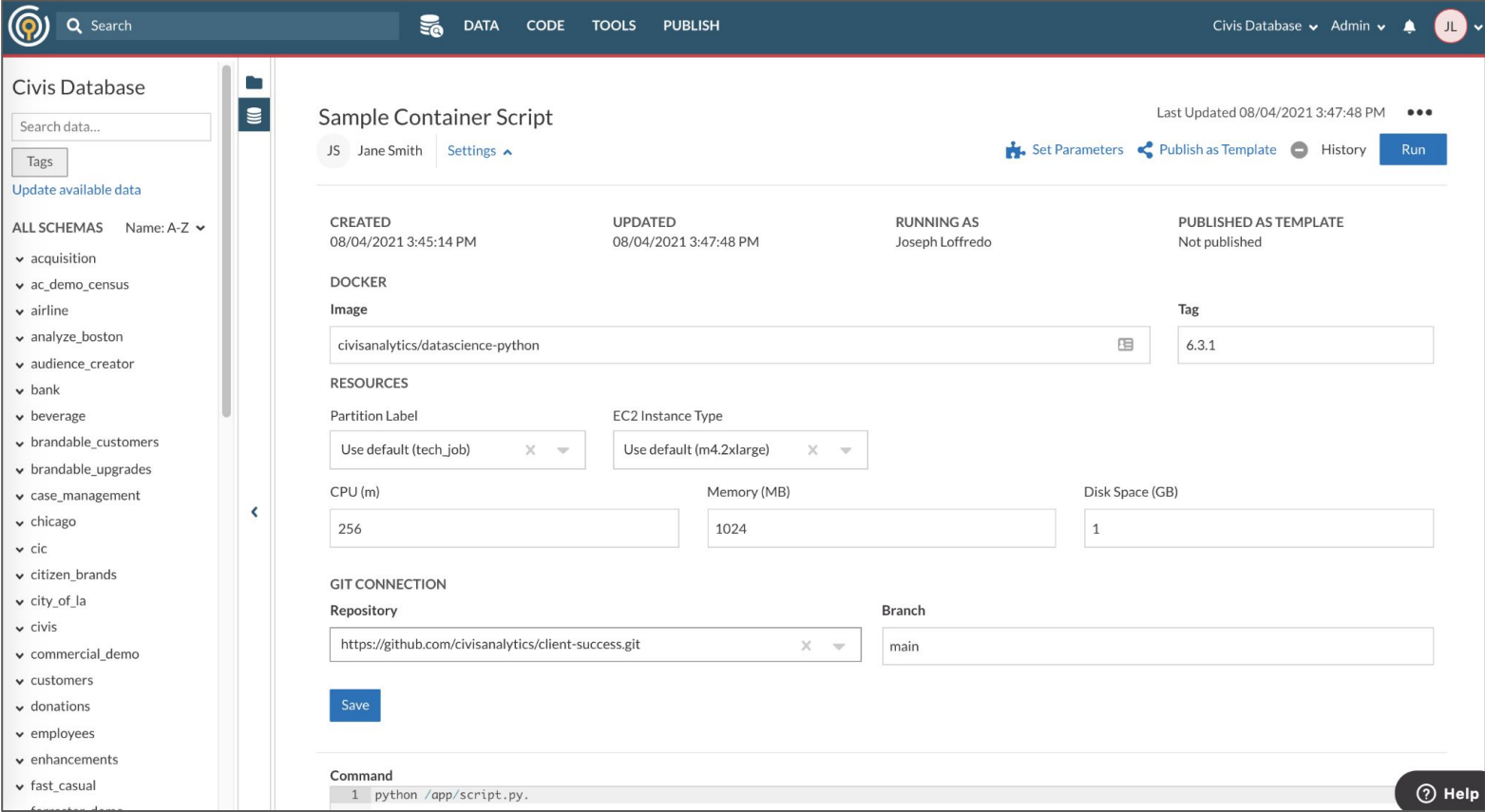
SQL

```

1 select ticket_id,
2   fname,
3   mname,
4   lname,
5   address,
6   city,
7   state,
8   zip,
9   email,
10  phone,
11  ticket_price,
12  origin,
13  destination
14 from airline.bookings
15 order by lname, fname, mname
                
```


Analyze & Transform Data

Scripts > Container Scripts



The screenshot shows the Civis Database interface for configuring a container script. The top navigation bar includes 'DATA', 'CODE', 'TOOLS', and 'PUBLISH'. The user is logged in as 'Jane Smith'.

Sample Container Script

Last Updated 08/04/2021 3:47:48 PM

JS Jane Smith Settings

Set Parameters Publish as Template History Run

CREATED	UPDATED	RUNNING AS	PUBLISHED AS TEMPLATE
08/04/2021 3:45:14 PM	08/04/2021 3:47:48 PM	Joseph Loffredo	Not published

DOCKER

Image **Tag**

RESOURCES

Partition Label: EC2 Instance Type:

CPU (m): Memory (MB): Disk Space (GB):

GIT CONNECTION

Repository: Branch:

Save

Command

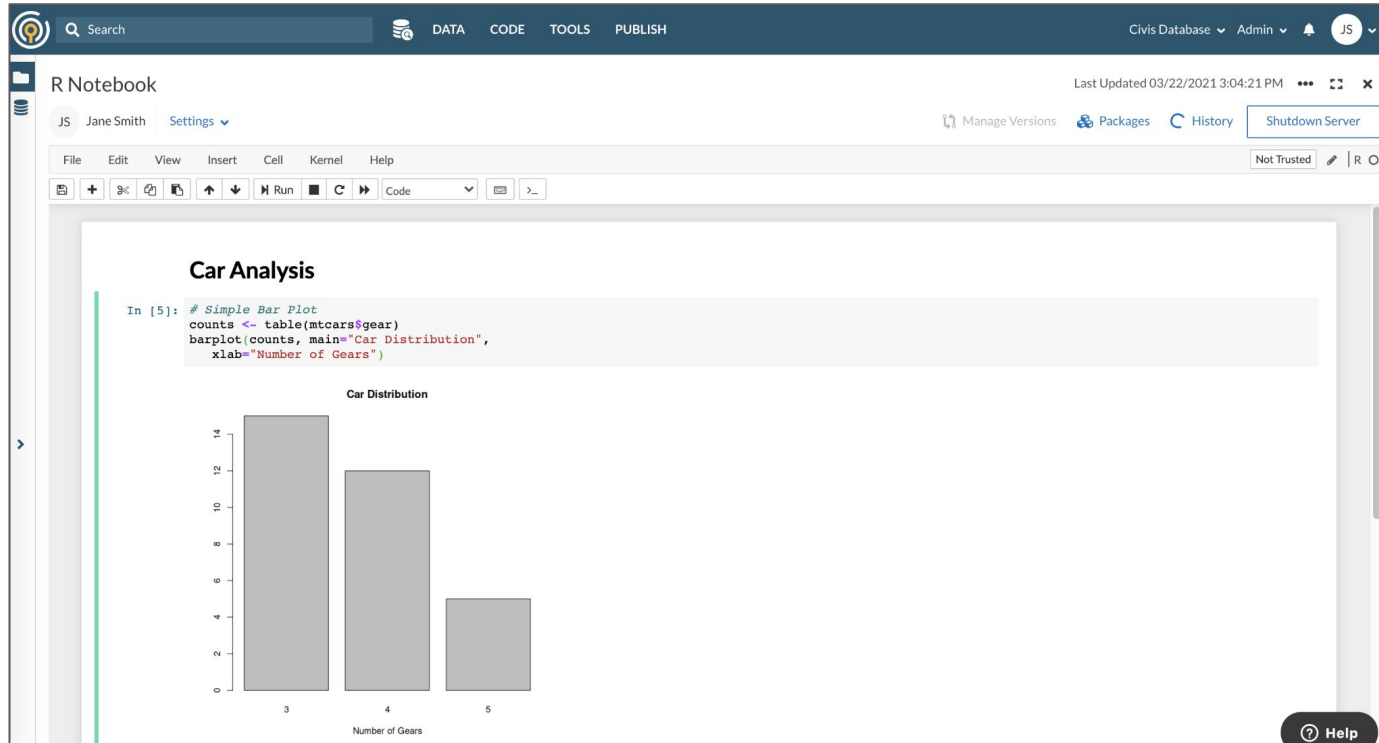
```
1 python /app/script.py.
```

Help

Analyze & Transform Data

Notebooks

Notebooks enable users to create and use Jupyter Notebooks in R or Python.



The screenshot displays a Jupyter Notebook interface for R. The notebook is titled "R Notebook" and shows a code cell with the following R code:

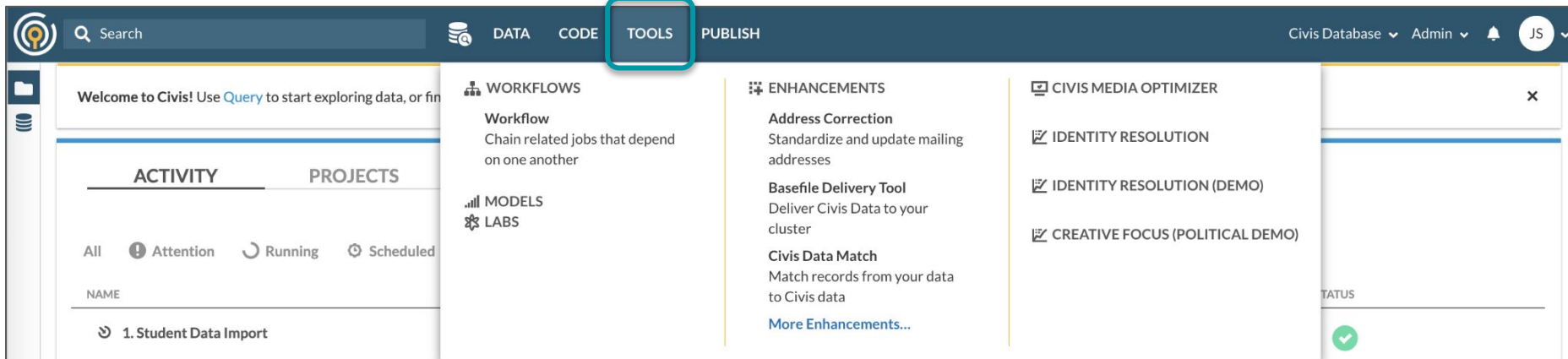
```
In [5]: # Simple Bar Plot
counts <- table(mtcars$gear)
barplot(counts, main="Car Distribution",
        xlab="Number of Gears")
```

The code cell is followed by a bar plot titled "Car Distribution". The x-axis is labeled "Number of Gears" and has three categories: 3, 4, and 5. The y-axis represents the count of cars for each gear type, ranging from 0 to 14. The bar for 3 gears is the tallest, reaching a count of 14. The bar for 4 gears reaches a count of 12, and the bar for 5 gears reaches a count of 5.

Number of Gears	Count
3	14
4	12
5	5

Analyze & Transform Data

Enhancements



The screenshot shows the Civis interface with the 'TOOLS' menu highlighted. The main content area is divided into three columns:

- WORKFLOWS:** Chain related jobs that depend on one another.
- ENHANCEMENTS:**
 - Address Correction:** Standardize and update mailing addresses.
 - Basefile Delivery Tool:** Deliver Civis Data to your cluster.
 - Civis Data Match:** Match records from your data to Civis data.
- CIVIS MEDIA OPTIMIZER:** Includes options for IDENTITY RESOLUTION, IDENTITY RESOLUTION (DEMO), and CREATIVE FOCUS (POLITICAL DEMO).

Address Correction

Civis takes a table of names and addresses, processes the records through USPS CASS-certified address standardization, and optionally matches records against the National Change of Address (NCOA) database

Person Data Standardization

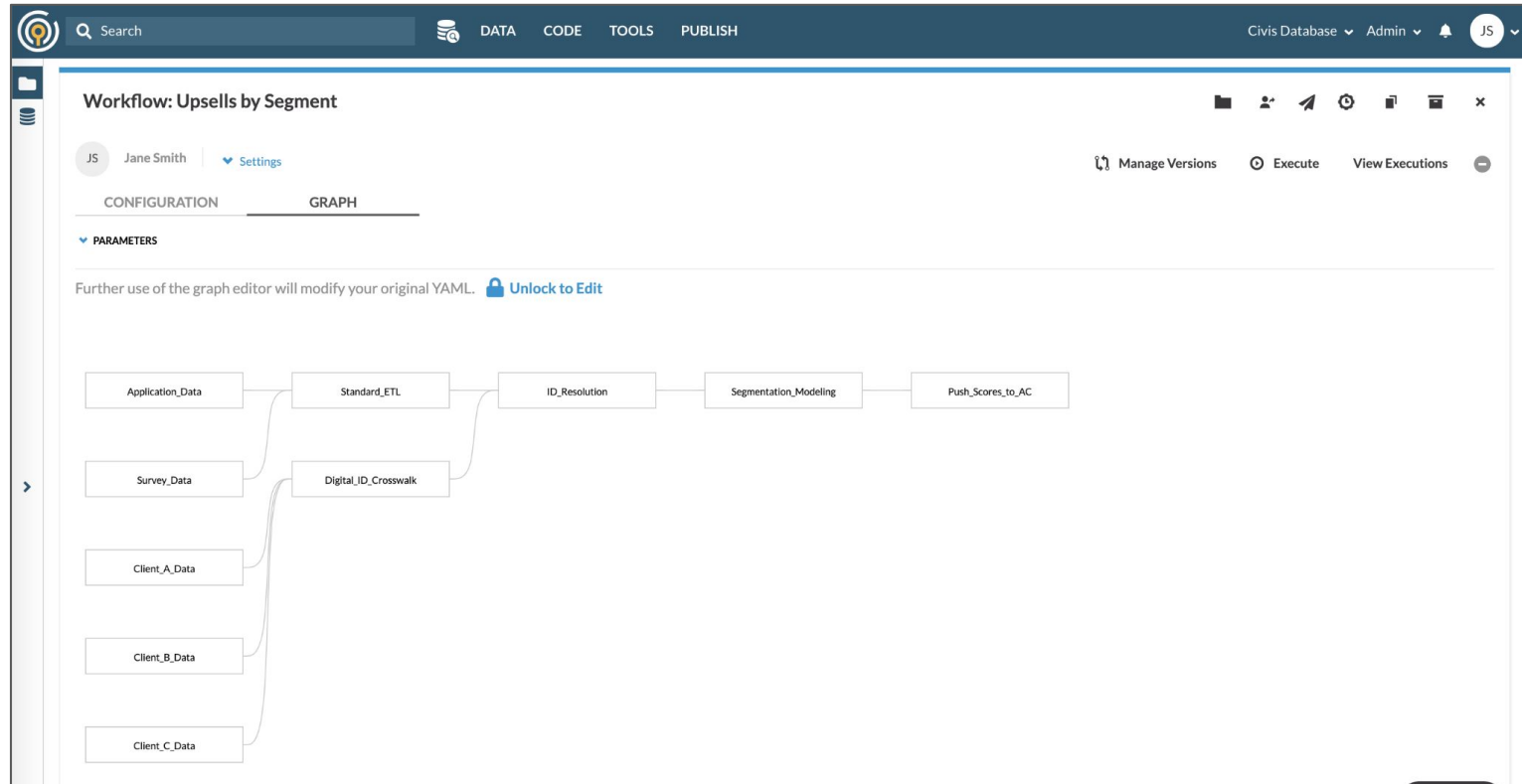
Civis takes a table with personally identifiable information (PII; e.g., names, addresses, and dates of birth), and standardizes the PII so that you have higher quality PII data

Civis Data Match

Civis takes your organization's person-level data and calculates the likelihood each record matches to an individual in a match target. The most common match targets are the Civis Data files.

Analyze & Transform Data

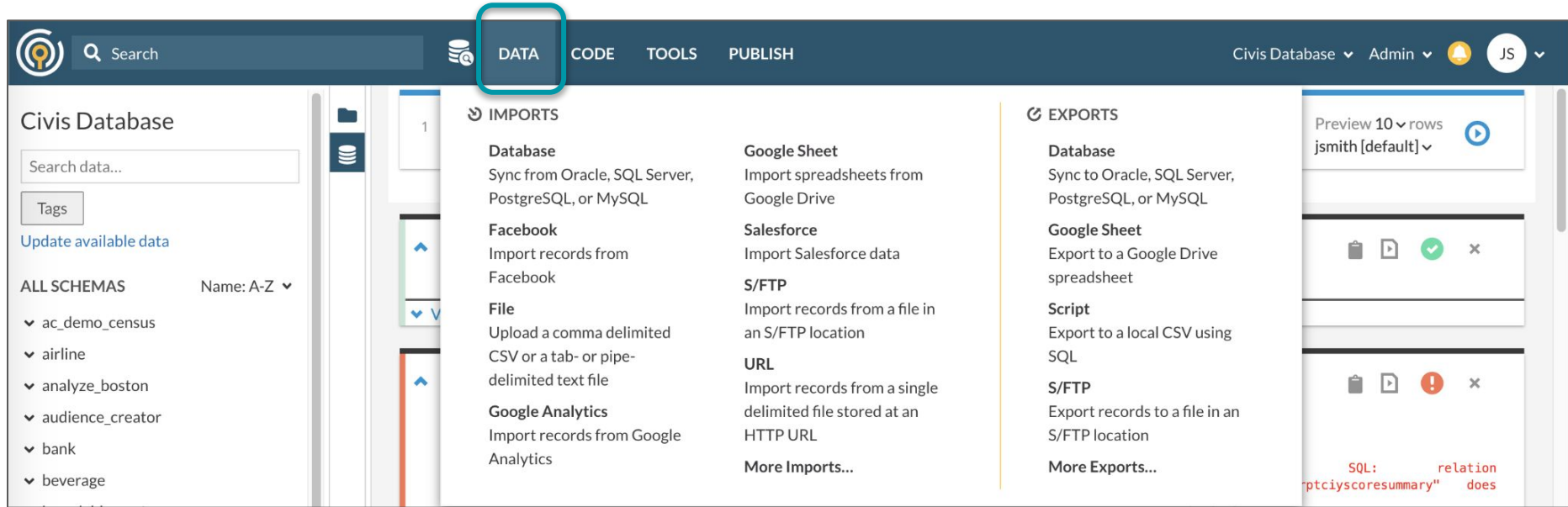
Workflows



Analyze & Transform Data

Exports

- Database
- File
- Google Sheet
- S/FTP



The screenshot shows the Civis Data platform interface. The top navigation bar includes a search bar, a 'DATA' menu (highlighted with a red box), and other options like 'CODE', 'TOOLS', and 'PUBLISH'. The 'DATA' menu is open, showing 'IMPORTS' and 'EXPORTS' sections. The 'EXPORTS' section lists options: Database, Google Sheet, Script, and S/FTP. A preview window on the right shows a table with columns 'relation' and 'does', and a row with values 'ptciyscoresummary' and 'does'. The SQL query 'SELECT * FROM ptciyscoresummary' is visible at the bottom of the preview window.

Analyze & Transform Data

Exports > Script Templates

With script templates, you can work with vendors like:

- NGPVAN
- MobileCommons
- Google BigQuery
- Facebook

Sample Export Civis Data to NGPVAN

Last Updated 08/04/2021 10:01:35 AM

This script was created from a template: [Export Civis Data to NGPVAN](#)

JS Jane Smith Settings

History Run

For more information on how to run this custom integration, please read the [documentation](#).

Cluster *

Select...

Cluster_credential *

Select...

[Create Credential](#)

Export mode *

Select...

Object or attribute to export - you may only select one

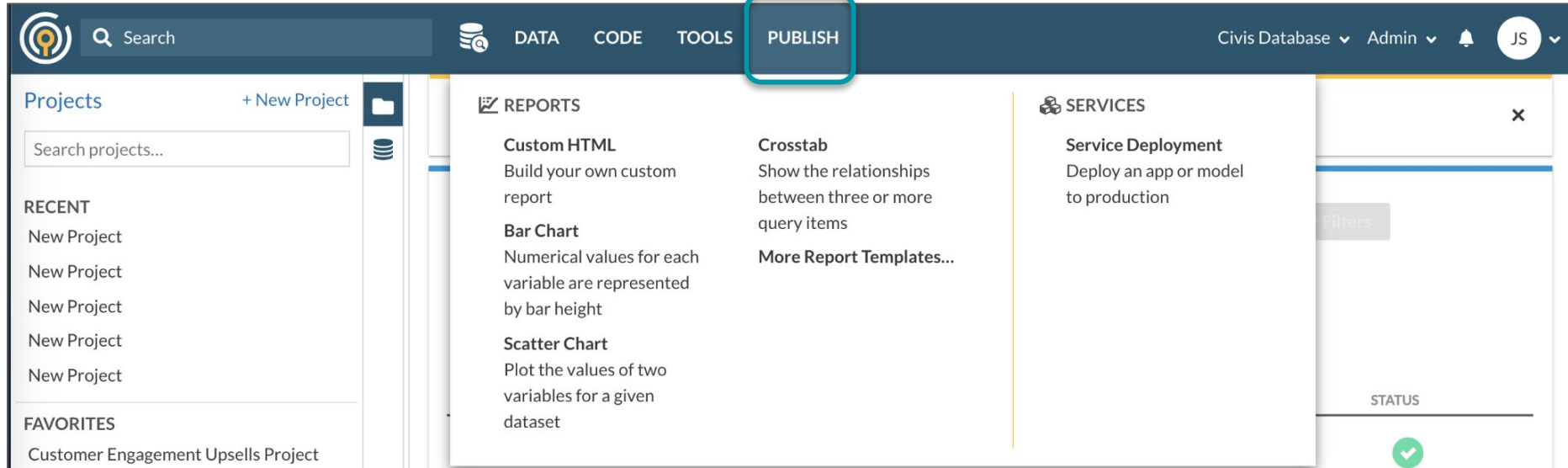
Queue View

Name of table with data to import into NGPVAN (One of Queue View or SQL Query is required)

SQL Query

?

Report



The screenshot shows the Civis Reports interface. The top navigation bar includes a search bar, a database icon, and menu items for DATA, CODE, TOOLS, and PUBLISH. The PUBLISH button is highlighted with a red box. Below the navigation bar, the interface is divided into three main sections: Projects, REPORTS, and SERVICES.

Projects (Left Panel):

- + New Project
- Search projects...
- RECENT
 - New Project
 - New Project
 - New Project
 - New Project
 - New Project
- FAVORITES
 - Customer Engagement Upsells Project

REPORTS (Middle Panel):

- Custom HTML**: Build your own custom report
- Bar Chart**: Numerical values for each variable are represented by bar height
- Scatter Chart**: Plot the values of two variables for a given dataset
- Crosstab**: Show the relationships between three or more query items
- More Report Templates...**

SERVICES (Right Panel):

- Service Deployment**: Deploy an app or model to production

Additional UI elements include a 'Filters' button and a 'STATUS' indicator with a green checkmark.

Report

Tableau



Publishing Tableau Reports

If you are interested in publishing Tableau dashboards to Civis Platform, reach out to Client Support to get started!

Key Civis Features

Projects

Projects are *folders* in Civis Platform allowing you to:

- Organize and store objects in a cohesive location
- Add notes and descriptions
- Share objects and improve collaboration across teams in Platform















Using Platform as an Analytics Workbench Last Updated 08/28/2019 6:39:28 PM

Sync data from multiple sources in to Civis Platform on regular schedule, resolve identities, update weekly dashboard

JS Jane Smith Notes


Filters: Object Type

NAME	TYPE	LAST UPDATED	LAST RUN	
Update Dashboard Jane Smith		07/10/2019 5:42:39 PM		
Master Table Build Jane Smith		08/28/2019 6:38:47 PM	 11/30/2016 12:01:30 AM	
Import Claims A Jane Smith		08/28/2019 4:43:35 PM	 08/28/2019 5:23:32 PM	
Import Claims B Jane Smith		08/28/2019 6:24:29 PM	 08/28/2019 7:06:01 PM	

Key Civis Features

Standard Action Menu

Data Cleaning

Last Updated 12/20/2019 11:54:19 AM 

JS Jane Smith Settings ▾



[Manage Versions](#) [Set Parameters](#) [Publish as Template](#)

DATABASE
Civis Database







SQL

```
1 -- SQL script for cleaning PAT data
2
3 drop table if exists patients.unified_affiliates cascade;
4 create table patients.unified_affiliates
5
6 as
7
8 with affiliates_clean as (
9
10 | select
```

View In / Add To

-  Add to Project
-  Add to Workflow

Other Actions

-  Share
-  Transfer Ownership
-  Notify
-  Automate
-  Clone
-  Archive

Key Civis Features

Standard Action Menu > Share

Data Cleaning

Last Updated 12/20/2019 11:54:19 AM ⋮

JS Jane Smith Settings ▾

[Manage Versions](#) [Set Parameters](#) [Publish as Template](#)

View In / Add To

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DATABASE
Civis Database

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9
10 | select
```

Key Civis Features

Standard Action Menu > Share

- Any jobs, reports, workflows, and project pages are shareable
- Users can share Platform objects with any user with which they have a common Platform group or with any Platform group they are a member of
- There are three permission levels you can assign to a user/group:
 - **Viewer:** users can only view shared object but may not edit or run it
 - **Editor:** users can edit and run shared object but may not delete or change the sharing settings of the object
 - **Manager:** users can edit, run, delete, and change sharing settings of the object
- Users *must* have **Manager** permission to share an object with a user/group
- By default, when a user creates an object, the authoring user will receive **Manager** permission and the user's primary Platform group will receive **Editor** permission.

Key Civis Features

Standard Action Menu > Share

Platform Objects	Database Objects
<p>Anything that is not a table or schema that users can create in or bring to Civis Platform.</p> <p><u>Examples include:</u> imports, exports, scripts, notebooks, workflows, reports, and any other resource that can be created or accessed via the navigation bar.</p>	<p>All schemas and tables from your Redshift/PostgreSQL database.</p>

Key Civis Features

Standard Action Menu > Share

- To view and interact with database objects, users must be granted the correct permission on both *schemas* and *tables*
- Users can see the schemas and tables they have access to in data pane
- Only table owners and superusers are able to GRANT privileges

Schemas	Tables
<pre>grant usage/create/all on schema to user/group</pre> <ul style="list-style-type: none"> → usage: makes objects in a schema accessible to users → create: allows users to create objects within a schema → all: grants both USAGE and CREATE on the schema 	<pre>grant select/insert/update/delete/all on schema.table to user/group</pre> <ul style="list-style-type: none"> → select: grants privilege to select data from table/view → insert: grants privilege to load data into a table → update: grants privilege to update a table column; also requires the SELECT privilege → delete: grants privilege to delete a data row from a table; also requires the SELECT privilege

Key Civis Features

Standard Action Menu > Notify

Data Cleaning

Last Updated 12/20/2019 11:54:19 AM ⋮

JS Jane Smith Settings ▾

[Manage Versions](#) [Set Parameters](#) [Publish as Template](#)

View In / Add To

- [Add to Project](#)
- [Add to Workflow](#)

Other Actions

- [Share](#)
- [Transfer Ownership](#)
- [Notify](#)**
- [Automate](#)
- [Clone](#)
- [Archive](#)

DATABASE
Civis Database

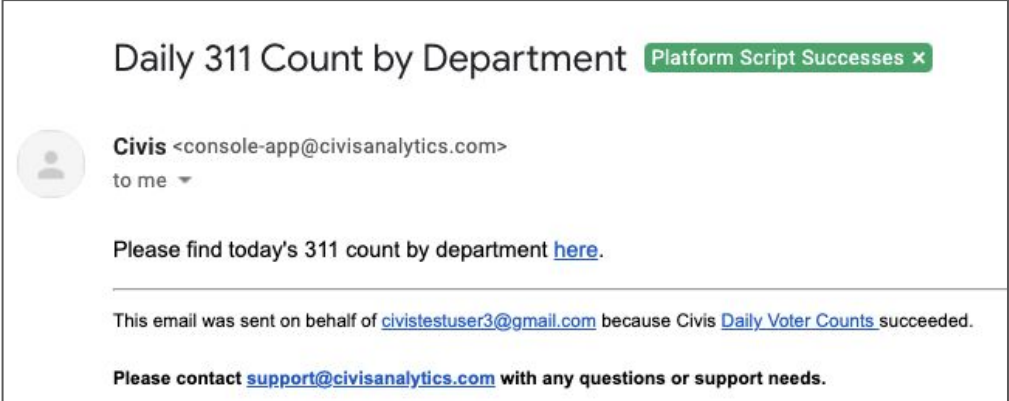
SQL

```
1 -- SQL script for cleaning PAT data
2
3 drop table if exists patients.unified_affiliates cascade;
4 create table patients.unified_affiliates
5
6 as
7
8 with affiliates_clean as (
9
10 | select
```

Key Civis Features

Standard Action Menu > Notify

Notification emails are useful for monitoring the status of Platform jobs. By default, on success or failure of a Civis job (import, export, script, or enhancement) or workflow, Civis will send an email to the job's owner.



Notify ✕

Send an automated email to yourself and/or others after this job runs. [Learn more.](#)

On Success Off On

Email Recipients*

📧

Separate multiple emails with comma

Email Subject

Email Body

You can use [markdown](#) to add formatting

URLs

Enter URL(s) to get job information via POST at job completion. One URL per line.

Reply To

Cancel Save

Key Civis Features

Standard Action Menu > Automate

Data Cleaning

Last Updated 12/20/2019 11:54:19 AM

JS Jane Smith Settings

Manage Versions Set Parameters Publish as Template

View In / Add To

- Add to Project
- Add to Workflow

Other Actions

- Share
- Transfer Ownership
- Notify
- Automate**
- Clone
- Archive

DATABASE
Civis Database

SQL

```
1 -- SQL script for cleaning PAT data
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4 create table patients.unified_affiliates
5
6 as
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8 with affiliates_clean as (
9
10 | select
```

Key Civis Features

Standard Action Menu > Automate

With automation, you can select which day(s), hour(s), and minute(s) you would like your job or workflow to run at.

Automation allows you to save time through eliminating repetitive, manual tasks.

Automate ✕

Schedule this script to run automatically.

Schedule On Off

On

At

Cadence Minutes Runs Per Hour

Run on: Sunday and Thursday
At: 4am and 7am
Cadence: 2 times(s) per hour
This job runs according to America/Chicago time.

[Generate an email address](#) to trigger this job via email.

[More](#) ▾

Cancel Save

Key Civis Features

Standard Action Menu > Archive

Data Cleaning

JS Jane Smith Settings ▾




DATABASE
Civis Database

SQL



```

1  -- SQL script for cleaning PAT data
2
3  drop table if exists patients.unified_affiliates cascade;
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```







Last Updated 12/20/2019 11:54:19 AM ⋮

 Manage Versions
  Set Parameters
  Publish as Template

View In / Add To

-  Add to Project
-  Add to Workflow

Other Actions

-  Share
-  Transfer Ownership
-  Notify
-  Automate
-  Clone
-  Archive

Key Civis Features

Standard Action Menu > Archive

In Platform, users *cannot* delete objects. User can, however, archive Platform objects so they no longer appear in Platform by default.

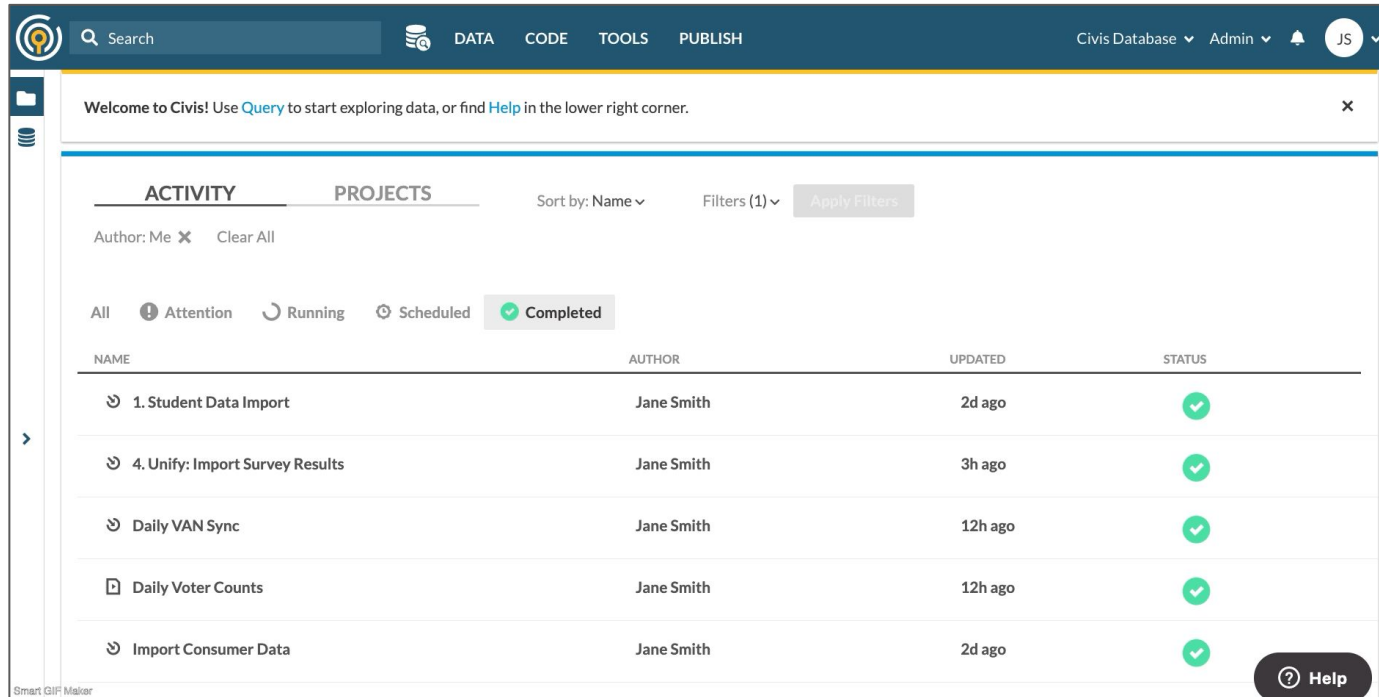
Users *can* archive Imports, Scripts, Exports, Projects, and Reports. While objects are archived, users cannot make any changes - these objects may not be run, renamed, added to a workflow, added to a project, scheduled or shared.

Platform objects that are scheduled, part of a workflow trigger, or published as a template may *not* be archived.

Key Civis Features

Credentials

Credentials allow you to connect to external sources (e.g. Databases, Salesforce, Google) in order successfully execute job runs in Platform, such as imports, exports, and scripts.



The screenshot displays the Civis platform interface. At the top, there is a dark blue navigation bar with a search bar, a database icon, and menu items for DATA, CODE, TOOLS, and PUBLISH. The user's name 'JS' is visible in the top right corner. Below the navigation bar, a white notification banner reads: "Welcome to Civis! Use [Query](#) to start exploring data, or find [Help](#) in the lower right corner." The main content area is titled "ACTIVITY" and "PROJECTS". It includes a "Sort by: Name" dropdown, a "Filters (1)" dropdown, and an "Apply Filters" button. Below this, there are filter options: "Author: Me" (with a close icon), "Clear All", and a row of status filters: "All", "Attention" (with a warning icon), "Running" (with a refresh icon), "Scheduled" (with a clock icon), and "Completed" (with a green checkmark icon). The "Completed" filter is selected. A table lists the activities with columns for NAME, AUTHOR, UPDATED, and STATUS. All listed activities are marked as "Completed" with a green checkmark.

NAME	AUTHOR	UPDATED	STATUS
1. Student Data Import	Jane Smith	2d ago	Completed
4. Unify: Import Survey Results	Jane Smith	3h ago	Completed
Daily VAN Sync	Jane Smith	12h ago	Completed
Daily Voter Counts	Jane Smith	12h ago	Completed
Import Consumer Data	Jane Smith	2d ago	Completed

Civis Platform 101 Key Takeaways

1. Use Civis Platform as your homebase to warehouse data, conduct analysis, and produce deliverables
2. Civis Platform is a software that sits on top of your database
3. If you need any assistance:
 - a. use our Help Center as a knowledge base
 - b. reach out to Client Support using the help widget or support@civisanalytics.com for any Platform administration requests, error message deciphering or bug reports

Thank you!

If you have any questions, please contact Civis Client Support at support@civisanalytics.com.