



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?



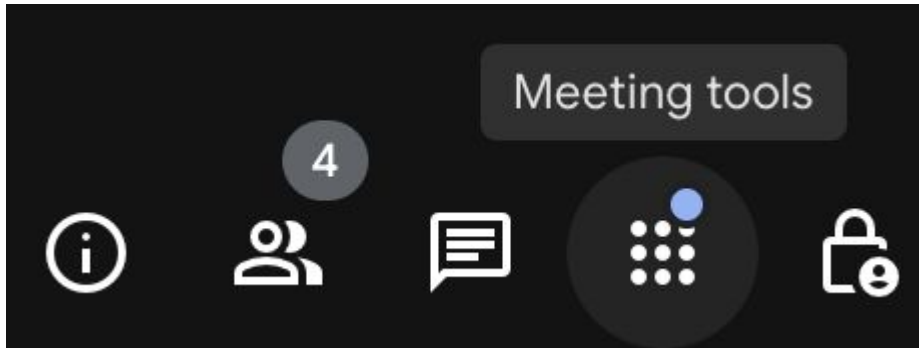


Training Norms

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!

Have a question?

Use the Q&A feature under “Meeting Tools”
and we will answer them at the end



Meeting tools



GOOGLE



Breakout rooms

Split into smaller group discussions



Polls

Get a quick pulse of the audience



Q&A

Give everyone an easy way to ask questions



Agenda

Intro To Civis Platform

Navigating Civis Platform

Imports and Exports

Data Analysis & Transformations

Civis AI

Data Visualizations



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 Civis Platform

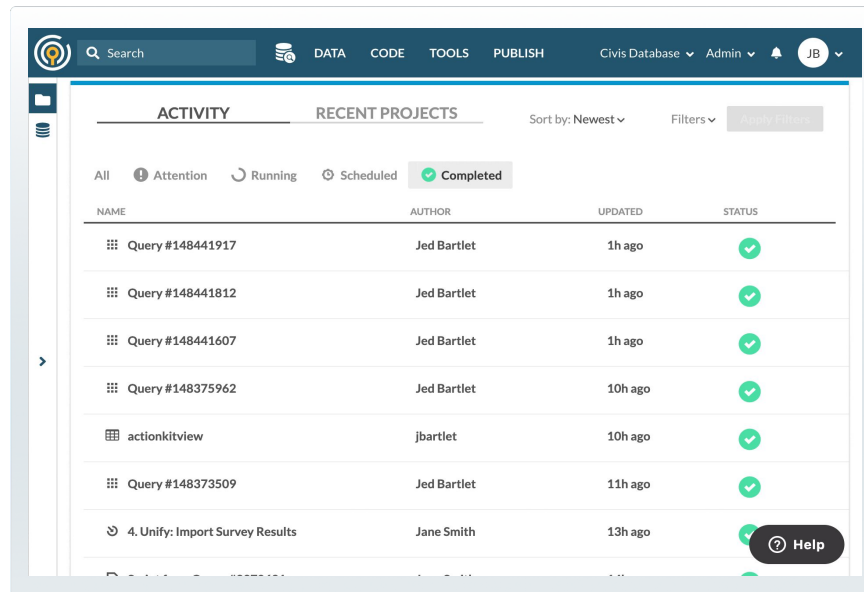
- Main Navigation Menu
- Global Search
- Data and Project Panes
- Standard Action Menu
- Help Widget

Intro to Platform

Main Navigation Menu

Access the following from the menu:

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



Intro to Platform

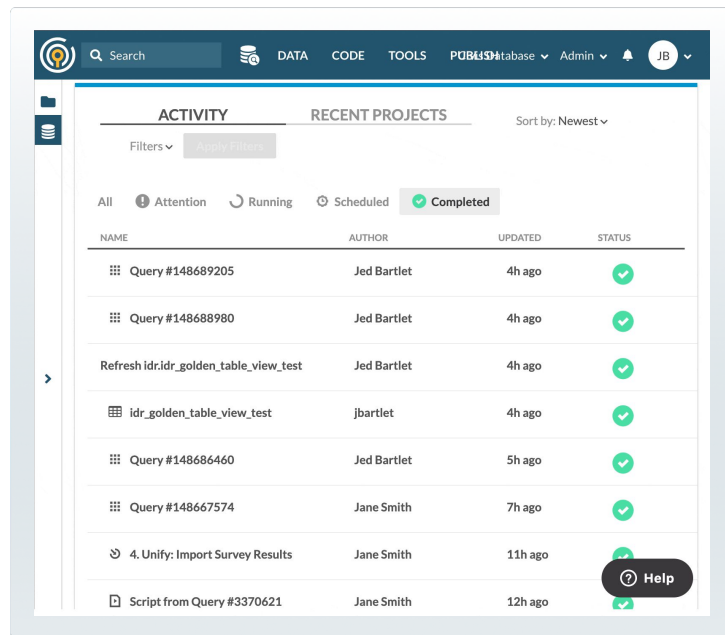
Global Search

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

Main Navigation Menu

Access the following from the menu:



Dashboard

Activity

Activity Metrics

50 most recent items from the last 30 days

0
Scheduled

15
Needs Attention

0
In Progress

31
Succeeded

☒ My Activity

Favorites

Type	Name	Owner	Updated At	
	Import #309225460	Jed Bartlet	04/11/2025 1:34:58 PM	...
	Deliverable XYZ	Jed Bartlet	04/10/2025 11:28:40 AM	...
	IDR Workflow	Jed Bartlet	09/12/2024 11:30:54 AM	...
	June 2024 - Nonprofit Fundraising Modeling Project	Jed Bartlet	06/24/2024 12:58:31 PM	...
	Modeling Workflow	Jed Bartlet	07/23/2024 10:50:31 AM	...

21 out of 50 max

1-5 of 21

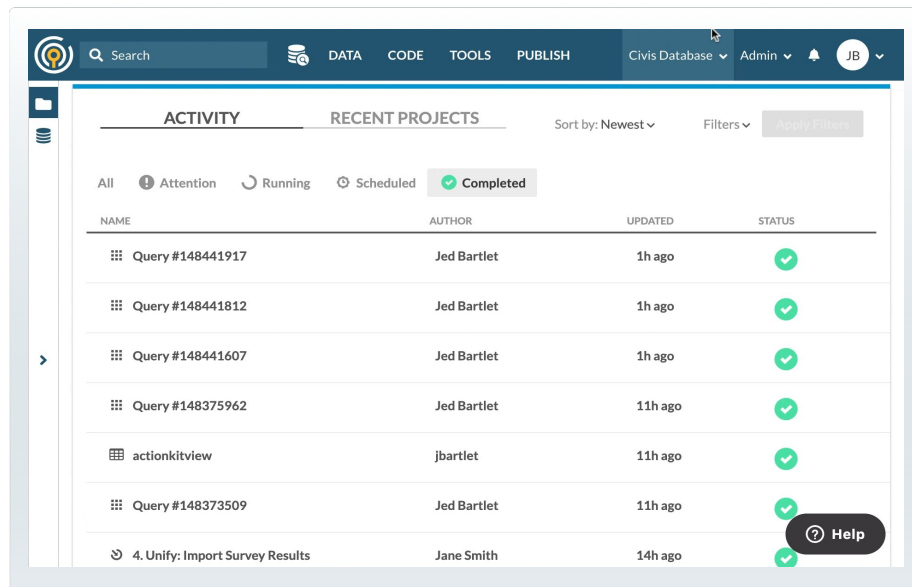
Organization Favorites

Type	Name	Owner	Updated At
	Healthcare Resources	Iane Smith	03/19/2020 2:14:01 PM

Intro to Platform

Data Pane

- The data pane on the left displays the data in your database
- 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
 - Scan a schema or table for updates



Intro to Platform

Project Pane

- The project pane on the left displays what projects 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

The screenshot shows the Civis Platform interface. On the left is the 'Projects' pane with a search bar and two sections: 'RECENTLY UPDATED' and 'FAVORITES'. The 'RECENTLY UPDATED' section lists several projects, including 'Deliverable XYZ', 'Ticket Pricing Model Workflows and Del...', 'Membership Organization Analytics and...', 'Federated Fundraising Workflow', and 'IDR Workflow'. The 'FAVORITES' section lists 'Deliverable XYZ', 'IDR Workflow', 'June 2024 - Nonprofit Fundraising Mod...', 'ACME Cleaning', 'NonProfit Civis Summit Project', 'Platform for Non-Profit Programs Pipeli...', 'Platform for Unions Pipeline', 'Platform for Fundraising Pipeline', 'Reporting', and 'Supporter Data Import, IDR, Report'. At the bottom of the pane is a 'View All Projects' link.

The main area shows the 'Dashboard' with 'Activity Metrics' for the last 30 days. It displays four metrics: 'Scheduled' (0), 'Needs Attention' (15), 'In Progress' (0), and 'Succeeded' (31). There is a 'My Activity' toggle switch.

Below the metrics is a 'Favorites' table with the following data:

Type	Name	Owner	Updated At	
1	Import #309225460	Jed Bartlet	04/11/2025 1:34:58 PM	...
■	Deliverable XYZ	Jed Bartlet	04/10/2025 11:28:40 AM	...
■	IDR Workflow	Jed Bartlet	09/12/2024 11:30:54 AM	...
■	June 2024 - Nonprofit Fundraising Modeling Proj	Jed Bartlet	06/24/2024 12:58:31 PM	...
■	Modeling Workflow	Jed Bartlet	07/23/2024 10:50:31 AM	...

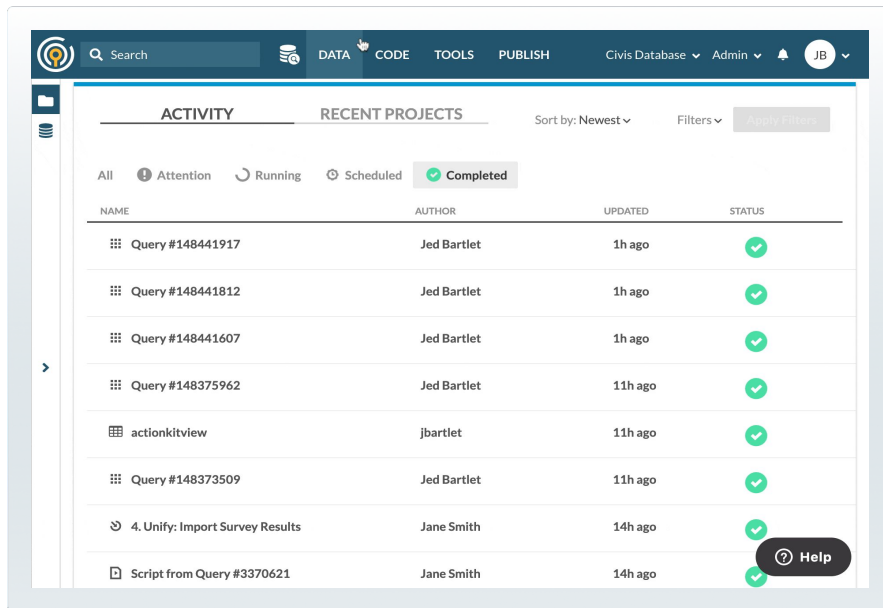
At the bottom of the table, it says '21 out of 50 max' and '1-5 of 21' with navigation arrows.

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

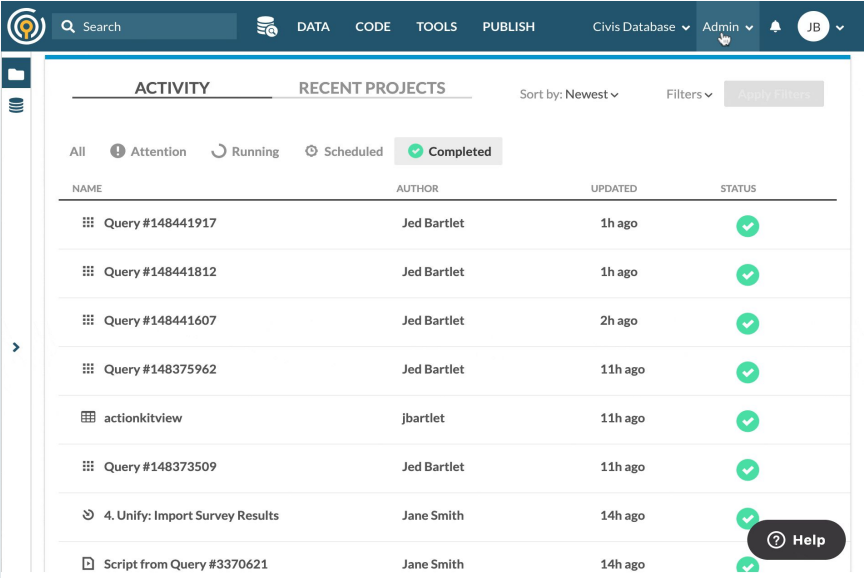


Intro to Platform

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. The top navigation bar includes a search bar, a 'DATA' tab, and links for 'CODE', 'TOOLS', and 'PUBLISH'. The user is logged in as 'JB' with a profile icon. The main content area is titled 'ACTIVITY' and shows a list of recent projects. The list is filtered by 'Completed' status. The table columns are NAME, AUTHOR, UPDATED, and STATUS. The table contains the following data:

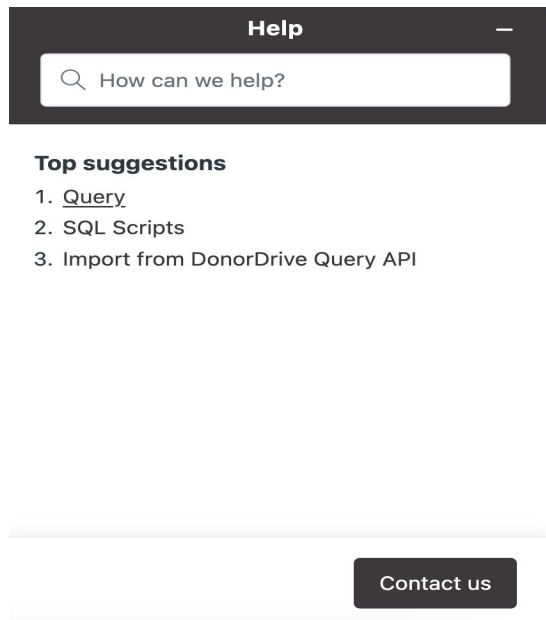
NAME	AUTHOR	UPDATED	STATUS
Query #148441917	Jed Bartlet	1h ago	✓
Query #148441812	Jed Bartlet	1h ago	✓
Query #148441607	Jed Bartlet	2h ago	✓
Query #148375962	Jed Bartlet	11h ago	✓
actionkitview	jbartlet	11h ago	✓
Query #148373509	Jed Bartlet	11h ago	✓
4. Unify: Import Survey Results	Jane Smith	14h ago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

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

Intro to Platform

Help Widget

- The help widget can be found at the top right of your screen in Platform
- From the Help Widget you can
 - Search through Zendesk articles for documentation on a wide array of topics





Imports and Exports

Credentials

Common Data Sources

API

Credentials

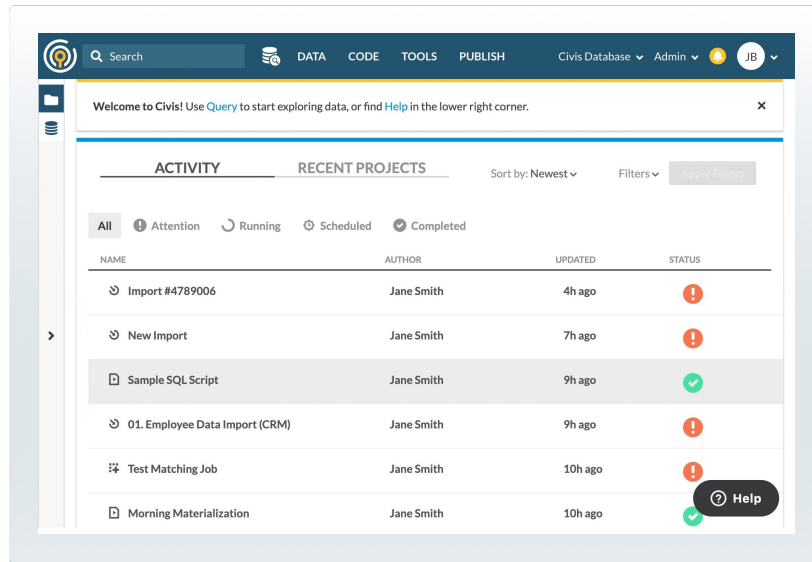
Purpose and Use of Credentials

- Civis Platform credentials are an easy way to securely store and manage access information
- Credentials allow you to connect to external sources (e.g. Databases, Salesforce, Google) in order to successfully execute job runs in Platform
- You may need to create a credentials when working with the following (or others):
 - Databases
 - Facebook
 - Google Analytics
 - Salesforce
 - S3

Credentials

Creating Credentials

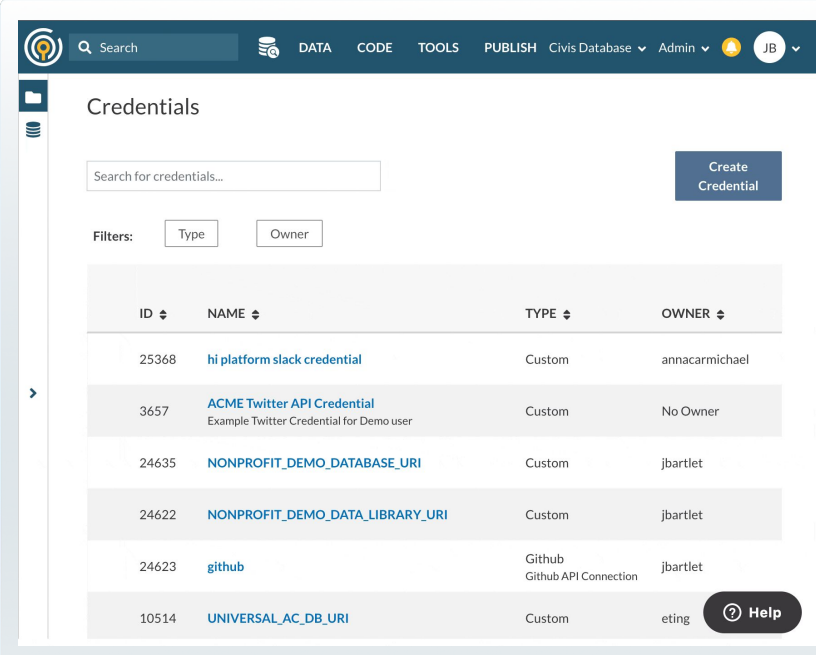
- To create a credential in Platform, navigate to the Admin tab, select “Credentials”
- Click “New Credential” in the top right corner
- The exact requirements for the fields depend on the source / API you are connecting to
- If you do not see the service named on the “Credential Type” dropdown, select "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 displays the 'Credentials' management page in a web application. The top navigation bar includes a search bar, a 'DATA' icon, and links for 'CODE', 'TOOLS', 'PUBLISH', 'Civis Database', 'Admin', and a user profile 'JB'. The main content area is titled 'Credentials' and features a search input field and a 'Create Credential' button. Below these are filter buttons for 'Type' and 'Owner'. A table lists several credentials with columns for ID, NAME, TYPE, and OWNER. The table entries include 'hi platform slack credential', 'ACME Twitter API Credential', 'NONPROFIT_DEMO_DATABASE_URI', 'NONPROFIT_DEMO_DATA_LIBRARY_URI', 'github', and 'UNIVERSAL_AC_DB_URI'. A 'Help' button is located at the bottom right of the table.

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

Imports and Exports

Common Sources

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

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

The screenshot displays the Civis BigQuery interface. At the top, there is a navigation bar with tabs: QUERY, DATA (selected), CODE, TOOLS, and PUBLISH. On the right of the navigation bar, it says 'Civis BigQuery' with a dropdown arrow. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'IMPORTS' with a 'View All' link. It contains a 'CREATE' section with the following 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... The right column is titled 'EXPORTS' with a 'View All' link. It contains a 'CREATE' section with the following 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 database imports, divided into two main sections: SOURCE and DESTINATION.

SOURCE Section:

- A dropdown menu shows "ActionKit : ak_username".
- A blue button labeled "New Database" is visible.
- A "SCHEMA *" field is present but empty.

DESTINATION Section:

- A dropdown menu shows "Civis Database : jbartlet [default]".
- A "SCHEMA *" field is populated with "public".
- A "TABLE *" field is populated with "new_tables".

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 window for database sync. It includes fields for 'SCHEMA *' (set to 'public') and 'TABLE *' (set to 'new_table'). Below these is a note about wildcard source tables. There are two toggle switches: 'FULL REFRESH ON EACH RUN' (set to 'No') and 'TRUNCATE LONG TEXT' (set to 'No'). At the bottom, there are two input fields: 'PRIMARY KEY' (empty) and 'LAST MODIFIED COLUMN' (set to 'Auto-Detect').

SCHEMA *	TABLE *
public	new_table

For wildcard source tables, use as an optional prefix for destination table names.

FULL REFRESH ON EACH RUN: Yes No

TRUNCATE LONG TEXT: Yes No

PRIMARY KEY:

LAST MODIFIED COLUMN: 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

run

×

▾

USER CREDENTIAL *

Select...

▾

[Create Credential](#)

Custom credential with Salesforce Username / Password+Security Token

CLIENT CREDENTIAL *

Select...

▾

[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

run

×

▾

USER CREDENTIAL *

Select...

▾

[Create Credential](#)

Custom credential with Salesforce Username / Password+Security Token

CLIENT CREDENTIAL *

Select...

▾

[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:
 - Click on “More Imports” or “More 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

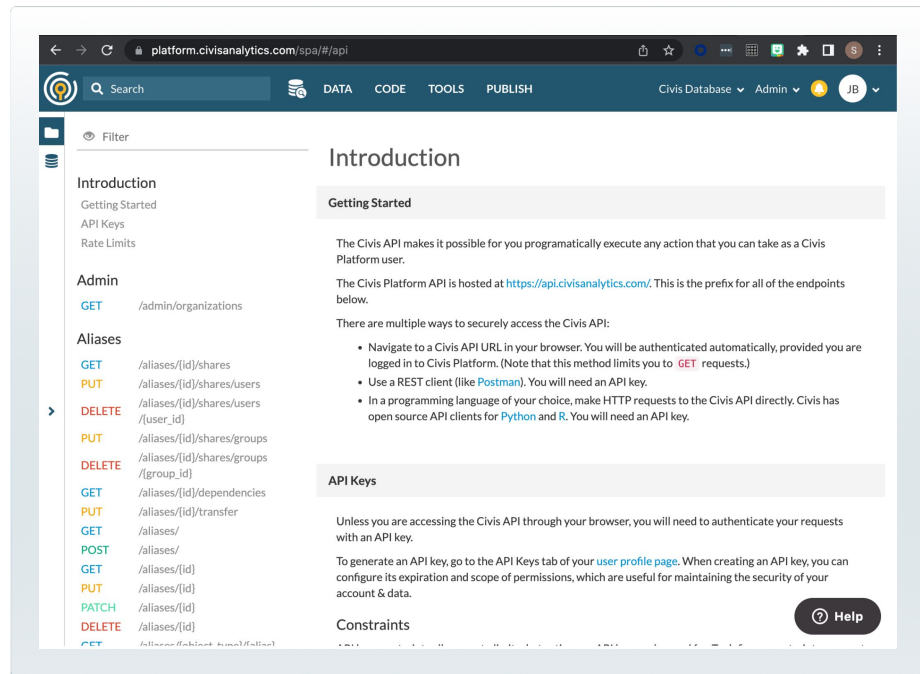
Salesforce

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 programmatically via an API
- The Civis API is hosted at <https://api.civisanalytics.com/> – this is the prefix for all the endpoints
- We offer a Python and R API Client
- Out-of-the-box import and exports can be created/executed via the API





Data Analysis & Transformations

Query

Notebooks

Scripts

Workflows

Civis Studio

Data Analysis & Transformations

Query

- Directly interact with your data using code in real time without leaving the Civis interface
- Search and filter past queries
- Configure # of preview results
- Format your query
- Open as a SQL script

The screenshot displays the Civis Query interface. At the top, there's a toolbar with buttons for 'Run', 'Generate SQL', 'Open As', 'Settings', and 'History'. Below the toolbar is a SQL query editor with the following code:

```
1 SELECT
2   campaignid,
3   count(has responded) as responded,
4 FROM
5   salesforce_raw.campaign_member
6 GROUP BY 1
```

Below the query editor, there's a 'Results Table' tab. It shows a table with 4 preview rows returned in 3s. The table has columns: 'Rows', 'campaignid', and 'responded'.

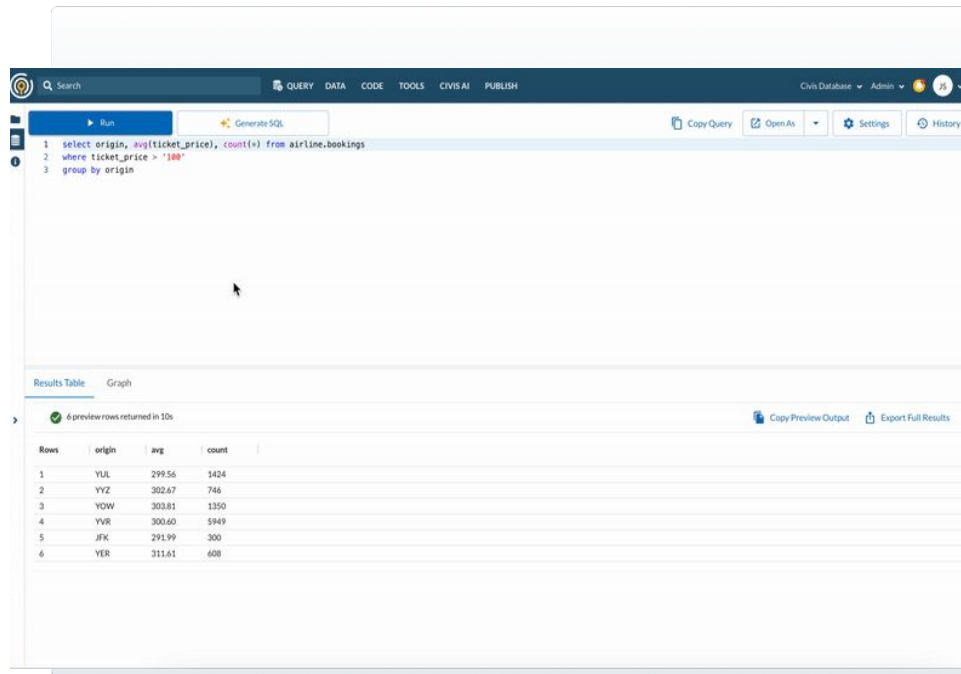
Rows	campaignid	responded
1	701Su00000V	2682
2	701Su00000V	2164
3	701Su00000V	3022
4	701Su00000V	2446

On the right side, there's a 'History' panel. It shows a search bar and a list of queries. The first query is highlighted, showing its execution details: 'A minute ago, 02/25/26, Ran successfully in 3s'. The query text is: '1 SELECT 2 campaignid, 3 count(has responded) as responded, ... Show More'. Below this, there's a 'View Results' button.

Data Analysis & Transformations

Query Graph

- Quickly visualize your results in the 'Graph' tab
- Choose chart type:
 - Bar
 - Line
 - Scatter
- Save as a SQL Report to share with your team



Data Analysis & Transformations

Scripts

- Enable users to query, modify, import and export data in any language:
 - Python
 - R
 - Javascript
 - SQL
 - Dbt
 - Container

Prep Data for IDR

Last Updated 03/09/2023 1:19:18 PM

JB Jed Bartlett Settings Manage Versions Set Parameters Publish as Template History Run

DATABASE
Civis Database

SQL

```
1 -- SQL script for cleaning data before Identity Resolution
2
3 drop table if exists idr.myc cascade;
4 create table idr.myc
5
6 as
7
8 with affiliates_clean as (
9
10     select
11         case
12             when age_today < 18 then '<18'
13             when age_today <= 34 then '18-34'
14             when age_today <= 49 then '35-49'
15             when age_today <= 64 then '50-64'
16             when age_today > 64 then '65+'
17             when age_today is NULL then NULL
18             else 'X' end as age_bucket,
19         case
20             when gender = 'F' then 'Female'
21             when gender = 'M' then 'Male'
22             else NULL
23         end as gender_groups ,
24
25     case
26         when top_score = 1 and matched = 1
27         then 'matched'
28         when top_score = 0 and matched = 0
```

Data Analysis & Transformations

Scripts

- Container script allows users to checkout code from any Github Repository.
- Run any code that you'd like on a dedicated server from within Civi.
- Docker to create and maintain the environment in which your code will run.

The screenshot shows the configuration page for a container script in Civi. The interface is divided into several sections:

- Metadata:** Includes fields for CREATED (02/25/2026 12:11:19 PM), UPDATED (02/25/2026 12:11:19 PM), RUNNING AS (Jed Bartlet), and PUBLISHED AS TEMPLATE (Not published).
- DOCKER:** Contains an Image field with the value 'civisanalytics/datascience-python' and a Tag field with the value '8.4'.
- RESOURCES:** Includes a Partition Label dropdown set to 'Use default (Job)', an EC2 Instance Type dropdown set to 'Use default (m4.xlar...', CPU (m) set to 256, Memory (MB) set to 1024, and Disk Space (GB) set to 1.
- GIT CONNECTION:** Includes a Repository dropdown set to 'Loading repositories...' and a Branch field set to 'main'.
- Buttons:** A blue 'Save' button is located below the Git Connection section.
- Command:** A text area at the bottom with a placeholder text: '# Enter your command here e.g. python /app/script.py.'

Data Analysis & Transformations

Scripts

- dbt is a popular tool for building data transformation pipelines in SQL
- Run dbt pipelines via dbt Scripts, either by themselves or as part of larger Workflows.
- Requires you to connect your script to your Git repository.

The screenshot displays the configuration interface for running dbt scripts. It is organized into four main sections:

- RUN ARGUMENTS**: Includes a "Repository *" dropdown, a "Repo Ref *" text field with a note "The branch or tag you want to use, e.g. 'main' or 'v1.0.0'", a "Skip docs generation" toggle switch, a "dbt Version" dropdown set to "1.8.3", a "dbt Command *" dropdown set to "build", and a "Command Line Arguments" text field.
- ENVIRONMENT VARIABLES**: Features an unchecked checkbox for "Auto-Generate profiles.yml" and explanatory text about profile file generation.
- DATABASE VARIABLES**: Contains a "Database *" dropdown set to "Civis BigQuery", a "Credential *" dropdown set to "Jed's Civis BigQuery Cred [default] (ID: ...)", and a "Schema" text field.
- DBT VARIABLES**: A section header at the bottom of the form.

Each variable section includes small text indicating which environment variables are generated by the configuration.

Data Analysis & Transformations

Notebooks

- Civis Platform supports in-app Jupyter notebooks for R and Python
- Users can leverage our Python or R API clients to interact with platform via Notebooks - or build right through the platform UI
- Notebooks leverage the same documentation and Github controls

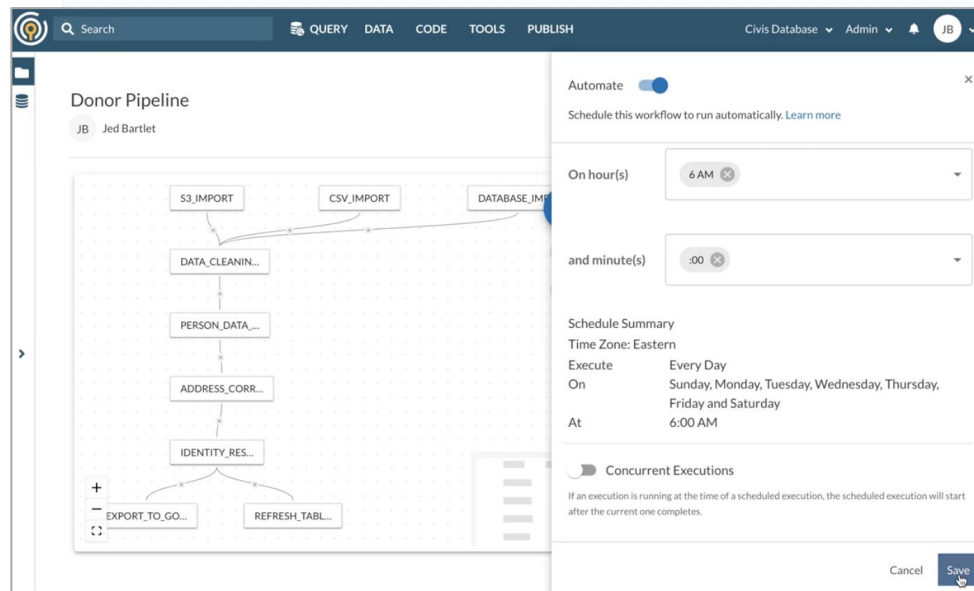
The screenshot displays the Civis Platform interface with a notebook titled 'Example Modeling Notebook - Modeling Demo'. The notebook content includes:

- Example Modeling Notebook**
Building a Donor Model - March 9, 2023
Author: Jed Bartlet
- Text: 'This notebook will highlight CivisML, and provide example code and commentary with sample data from an imaginary nonprofit called "Dewguad". We'll start by loading in a training table, then training a Logistic Regression model, and finally evaluating its performance. This notebook uses Civis's Python client. There is a similar interface for R as well.'
- Resources**
Python Client: <https://civis-python.readthedocs.io/en/latest/table/ml.html>
- Load and Preview Training Table**
We will first load in a prepared dataset with member id, their zip code, whether they are currently a donor, joined to features about their zip code.
- Code Cells:**
 - In [1]:** # Prep
import civis
import pandas as pd
from civis import APIClient
client = APIClient()
db_name = 'redshift-general'
 - In [2]:** # load the dataset
df = civis.io.read_civis(table='public.dewguad_training',
database=db_name,
use_pandas=True)
 - In [3]:** # preview the dataset
print('Data has dimensions: {}'.format(df.shape))
df.head()
 - Out [3]:** A table with 88 columns: is_donor, num_donations, total_amount, dewguad_user_id, residential_zip, census10_county_is_in_msa, census10_is_in_place, census10_place_is_in_principal_city, census10_pct_under18, census10_pct_18plus, and aca14_m. The first 5 rows are shown.
 - In [4]:** # display counts by donor status
df.groupby('is_donor').count()[['dewguad_user_id']]
 - Out [4]:** A table with 2 columns: is_donor and dewguad_user_id. The counts are 727 for is_donor=0 and 273 for is_donor=1.

Data Analysis & Transformations

Workflows

- Chain jobs together to create a Workflow.
- Run multiple tasks in sequence to create a unified task structure and an end-to-end data analytics pipeline.
- Entirely programmable through a visual drag-and-drop interface, but advanced users can use YAML to build and configure workflows

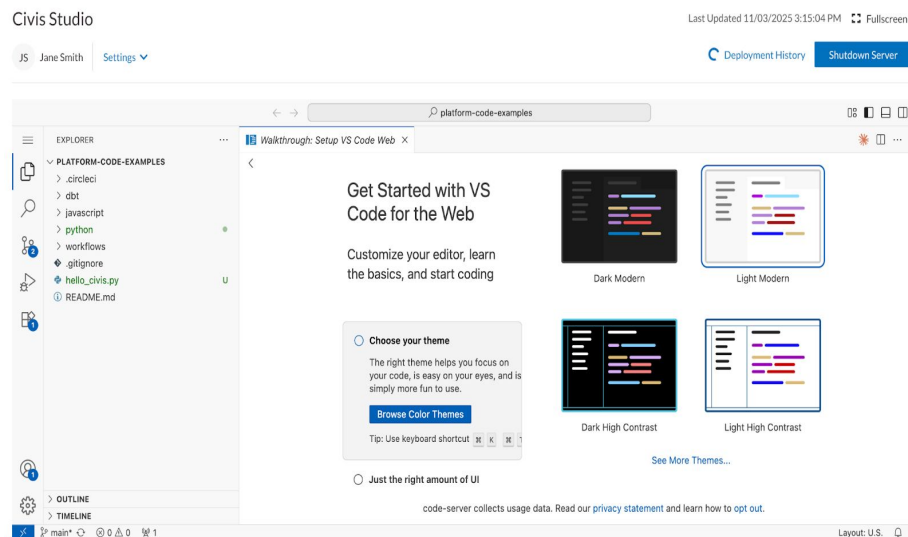


Data Analysis & Transformations

Civis Studio

What is Civis Studio?

- A secure virtual development environment built with the open source version of Visual Studio Code
- Allows you to write, run, and commit code to Github
- Use it to edit multiple files, perform git operations, and debug your code before productionalizing in a script or workflow
- Includes a beta version of the open-source Copilot Chat extension





Civis AI

SQL AI Assist

Civis AI: Taxonomer

Civis AI: Core

Civis AI

SQL AI Assist

- AI-powered tool integrated directly into the Civis Query Tool and SQL Report pages.
- Helps you craft SQL queries by offering smart, context-aware suggestions and automating parts of the process, so you can spend more time analyzing data and less time writing complex queries.
- Uses metadata from tables you have mentioned in your prompt.



Civis AI

Civis AI: Core

- Core allows you to send text to a language model and receive responses (e.g., answers to questions, labels for documents you want to categorize, or a summary of a collection of documents)
- Choose from available models that are best suited to your use case

Civis AI: Core #343244852

Last Updated 02/24/2026 9:54:15 PM   

This script was created from a template: [Civis AI: Core \(Anthropic Claude\)](#)

JB Jed Bartlet

Settings 

 History

Run

This template enables the use of custom prompts with a generative AI model. See [Civis's Zendesk documentation](#) for usage examples and other information.

System Prompt

An optional system prompt to provide context, instructions, or guidelines.

User Message *

The main message to send. Use '{{ single_text }}' or '{{ all_texts }}' to include your data.

Assistant Response Prefix

An optional prefix for the assistant's response. If you aren't sure what to use this for, leave it blank.

Model ID

Select... 

? More information can be found in Civis Help Documentation: [Civis AI: Core](#)



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Civis AI

Civis AI: Taxonomer

- Taxonomer tool uses generative AI to categorize text. You only need to tell it where your data is and what categories you want to label the data with.
- Recommend using default model
- Option to choose another model

Civis AI: Taxonomer #343244924

Last Updated 02/24/2026 9:58:48 PM

JB Jed Bartlet Settings

History Run

Taxonomer performs text categorization using generative AI language models. See the [documentation](#) for more information, including usage examples and information about the underlying models and acceptable usage.

INPUT & OUTPUT DATABASE

Select the database and credential to use for the input and output tables.

Database *

Civis BigQuery

Credential *

Jed's Civis BigQuery Cred [default] (ID: 33409)

INPUT TABLES & COLUMNS

Select the tables and columns to use for input.

Input Schema *

The schema and table where the input should be read from

Input Table *

The table where the input should be read from

Input Text Column *

The column containing text data to process

Input ID Column *

The column to use as a unique identifier. This should be different from the input text column.

PROMPT CONFIGURATION

Configure the language model prompt by specifying information about the categorization task.

Text Description *

Civis AI

MCP Server

A Docker-based server that lets any AI tool talk directly to Civis Platform — query data, run jobs, troubleshoot workflows, and build reports in plain language.

Try asking...

"Why did my workflow fail?"

"How many records are in the voter file table?"

"Build an HTML report from this query and publish it."

"Set up and deploy an R Shiny app for me."

Works with

Claude Desktop

Claude Code & Copilot in VSCode

Civis Studio

pre-installed, no setup needed

Any MCP-compatible client

To get started locally

Docker installed and running

Claude Desktop or VSCode + Copilot

Civis Platform API key



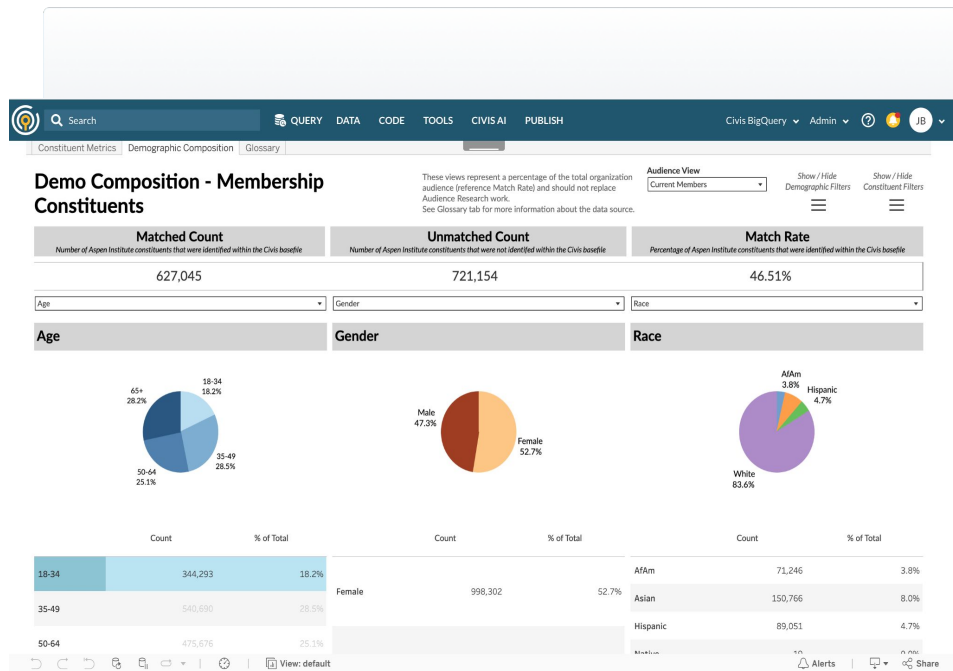
Data Visualization

Reports

Visualizations

Reporting

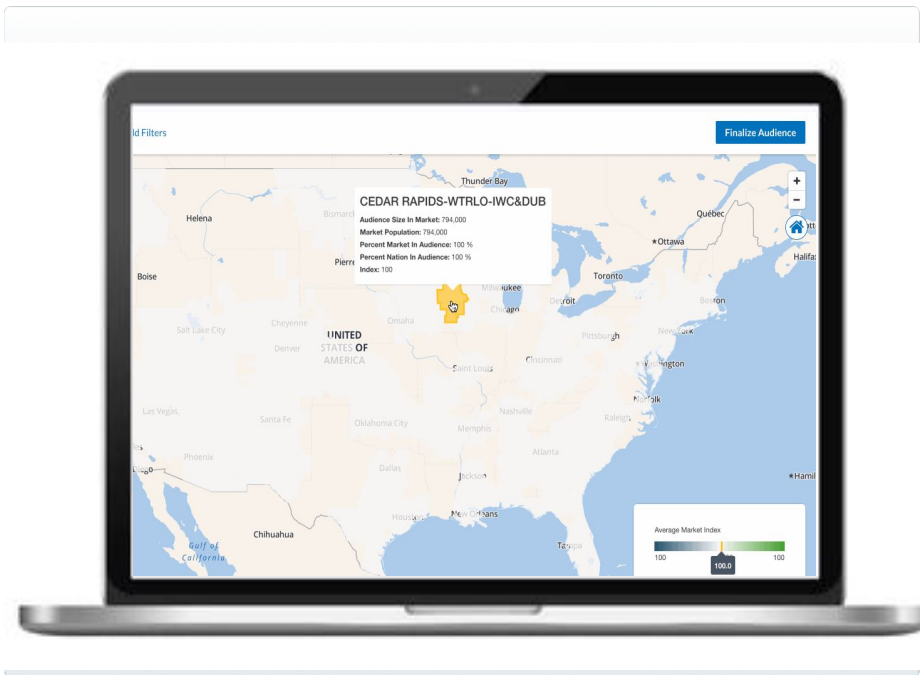
- Tableau
- HTML Reports
- SQL Reports
- Looker Studio



Visualizations

Services

- Host your web applications and introduce interactivity into your data science workflow through useful front-end tools.
- Supports several frameworks:
 - RShiny
 - Flask
 - Streamlit





Get in Touch

Interested in learning what Civis Analytics can do for your organization? We'd love to connect.

Reach out to us at Info@civisanalytics.com.



Thank you!

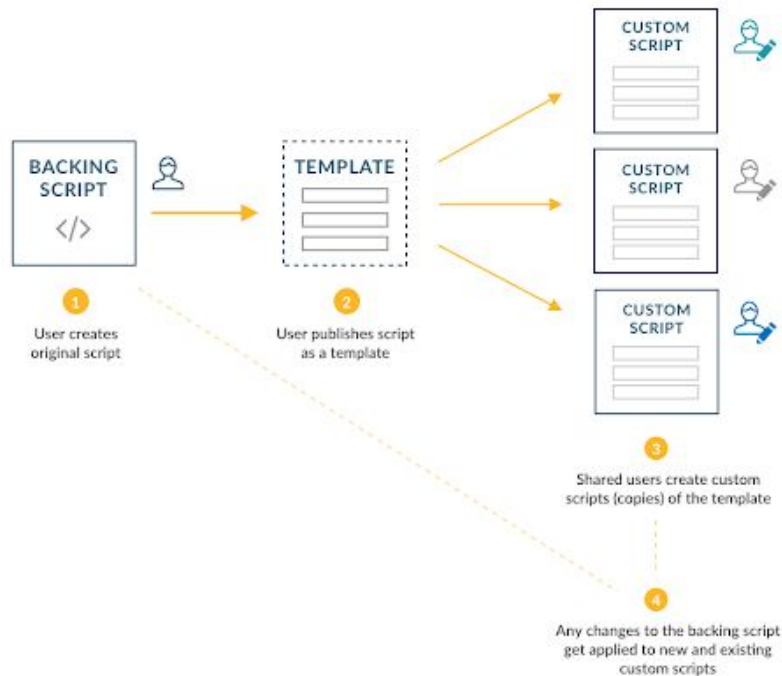
Reach out to Support@CivisAnalytics.com with any questions!



Container Scripts | Run analytics in any code and make it self-service

Capabilities:

- Civis allows you to run *any code* that you'd like on a dedicated server from within Civis. We integrate with GitHub and DockerHub to access your code and environment
- This code can be parameterized and published as a template
- This allows users to put their analytics tools securely in the hands of non-technical users to self-serve analytics
- Code can also be run on a schedule, or connected to other Civis jobs like imports or models as part of an automated workflow





Automated Workflows | Build your analytics pipeline

Capabilities:

- Civis allows you to chain ETL and analytics tasks together to create a Workflow. This allows you to run multiple tasks in sequence to create a unified task structure and to create an end-to-end data analytics pipeline.
- Workflows are entirely programmable through a visual drag-and-drop interface, but advanced users can program YAML on the back-end.
- Proficient users typically put all of their recurring work, especially complex reporting, into programmed workflows from CRM ingestion to published distribution.

The screenshot displays the Civis interface for editing a workflow named "Donor Pipeline". The workflow is visualized as a sequence of tasks: S3_IMPORT, CSV_IMPORT, DATABASE_IMPORT, DATA_CLEANING, PERSON_DATA_IMPORT, ADDRESS_CORRECTION, IDENTITY_RESOLUTION, EXPORT_TO_GOOGLE, and REFRESH_TABLES. The tasks are connected by arrows indicating the flow of data. On the right side, there is a panel for configuring automation. The "Automate" toggle is turned on. The "Schedule this workflow to run automatically. Learn more" link is visible. The "On hour(s)" dropdown is set to "6 AM" and the "and minute(s)" dropdown is set to ":00". The "Schedule Summary" section shows the "Time Zone: Eastern", "Execute" frequency as "Every Day", and "On" days as "Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday". The "At" time is "6:00 AM". The "Concurrent Executions" toggle is turned off. At the bottom right, there are "Cancel" and "Save" buttons.



Data Catalog and Governance | Know and control your data assets

Capabilities:

- Data discovery via table tags and searching
- Quick insights into datasets including sample values, coverage, and statistics
- User- and Group-level permission control and visibility

chicago.business_site_info Table ×

Citywide Business Information ↗

ROWS 17,028 | COLUMNS 39 | SIZE 168.00 MB | DATA UPDATED N/A | TABLE METADATA ? ✓ Current: [Refresh now](#) | ▼ Query

[Columns](#) [Sample Rows](#) [Create Statement](#) [Privileges](#) ?

Name	Type	Compression	Distinct Values	Row Coverage	Minimum Value	Maximum Value
license	integer	none	16,691	100.00%	2	2630933
dba_name	varchar(1024)	lzo	13,922	100.00%	#1 CHOP SUEY	mEAT ON C
id	varchar(1024)	lzo	16,691	100.00%	1000049-20160516	990-201706
license_id	integer	none	16,691	100.00%	1029125	2645629
account_number	integer	none	13,041	100.00%	1	432139
site_number	integer	none	174	100.00%	1	181
legal_name	varchar(1024)	lzo	13,013	100.00%	"6978 W. NORTH, INC."	wisma conce
doing_business_as_name	varchar(1024)	lzo	13,530	100.00%	"C" A CATERING AND EVEN...	wisma
address	varchar(1024)	lzo	14,896	100.00%	1 E 113TH ST # 1	[REDACTED]



Notebooks | Build and share notebooks in R and Python

Capabilities:

- Civis Platform supports in-app Jupyter notebooks for R and Python
- Users can leverage our open-source Python API to interact with platform via Notebooks - or build right through the platform UI. In-platform use enables more efficient compute and memory resourcing
- Notebooks leverage the same documentation and Github controls

The screenshot displays the Civis Platform interface for an 'Example Modeling Notebook - Modeling Demo'. The notebook is titled 'Example Modeling Notebook' and is authored by 'Jed Bartlett' (March 9, 2023). It provides an overview of the notebook's purpose: to highlight CivisML and provide example code and commentary with sample data from an imaginary nonprofit called 'Dewguad'. The notebook starts by loading a training table, training a Logistic Regression model, and finally evaluating its performance. It also mentions that the notebook uses Civis's Python client, which has a similar interface to R as well.

Resources
Python Client: <https://civis-orchon.readthedocs.io/en/latest/ml.html>

In [1]: # Prep
import civis
import pandas as pd
from civis import APIClient
client = APIClient()
db_name = 'redshift-general'

Load and Preview Training Table
We will first load in a prepared dataset with member id, their zip code, whether they are currently a donor, joined to features about their zip code.

In [2]: # load the dataset
df = civis.io.read_civis(table='public.dewguad_training',
database=db_name,
use_pandas=True)

In [3]: # preview the dataset
print('Data has dimensions: {}'.format(df.shape))
df.head()

Out [3]:

	is_donor	num_donations	total_amount	dewguad_user_id	residential_zip	communit50_community_h_in_msa	communit50_h_in_place	communit50_place_h_in_principal_city	communit50_pct_under18	communit50_pct_18plus	acs14_m
0	1	7	24.4	002140191812347	43805	1	0	0	0.192118	0.807882	...
1	1	8	25.0	021071636015407	44224	1	1	0	0.116667	0.883333	...
2	0	3	22.9	024075020946404	45601	1	0	0	0.288136	0.711864	...
3	1	4	22.8	04e30e1a100848	43227	1	1	1	0.197531	0.802469	...
4	0	3	24.6	063302ec16e6	44133	1	1	0	0.246825	0.753175	...

5 rows x 12 columns

We have data for 1000 members, and about 80 features for those members. Next, let's check if our training set is balanced.

In [4]: # display counts by donor status
df.groupby('is_donor').count()[['dewguad_user_id']]

Out [4]:

is_donor	dewguad_user_id
0	727
1	273



Hosted Applications | Build, manage, and deploy custom apps at scale

Capabilities:

- Civis Platform Services make it easy for you to host your web applications and introduce interactivity into your data science workflow through useful front-end tools. These can be R-Shiny, various Python tools, and even highly custom front-end Java applications.
- Compute and memory resources are handled natively, so it's easy for you to increase or decrease the resources your application uses on a case by case basis
- These applications use the same credentialing and Github version support, enabling easy team collaboration

