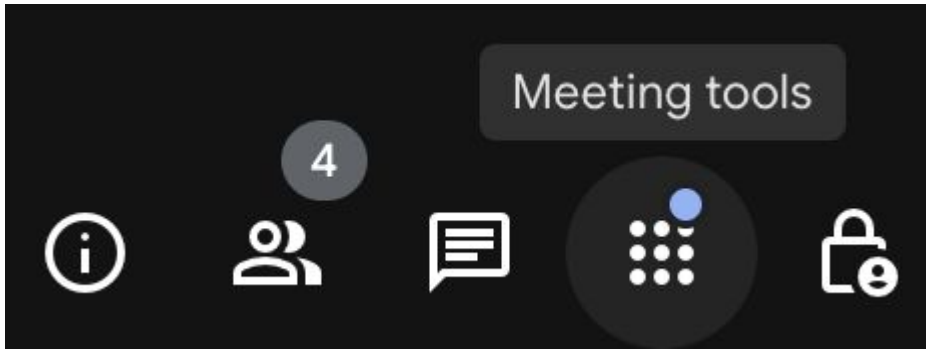
Reporting on Civis Platform

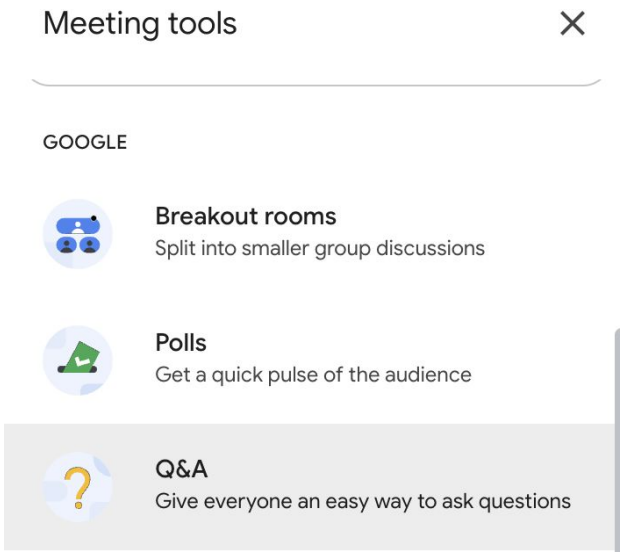
May 2026

Civis Analytics • Webinar

Have a question?

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





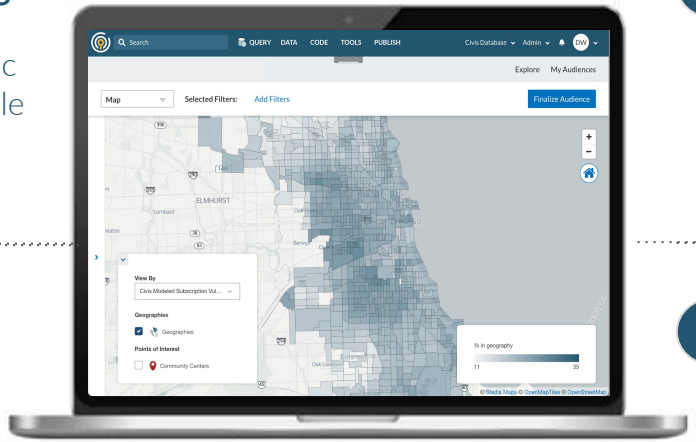
Civis Platform | All-in-one data, analytics, and AI infrastructure

1 Data Ingestion & Warehousing

Hosted on AWS Redshift, our out-of-the-box nonprofit and public sector CRM integrations bring scale and ease of use.

2 Security & Governance

Civis Platform is SOC 2 Type-II certified, FedRAMP Authorized & comes with Role-Based Access Controls to ensure data is secure & well-governed.



3 Analytics & AI Workbench

A simple, unified interface for in-house data teams to write and automate their analytics and AI LLM workflows right in the UI.

4 Visualization toolkit

Out-of-the-box integrations with Tableau and other visualization tools to build and distribute custom reports.

AICPA SOC 2

aws PARTNER
- Nonprofit Software Competency
- Data & Analytics Software Competency

ISV Accelerate Marketplace Vendor

FR In Process

AGENDA

What we'll cover today

01

Types of Reports on Civis Platform

Tableau, SQL, HTML, and Service reports — and how to access them

02

Setting Up the Civis MCP Server

Using Claude Desktop or Copilot to interact with Platform via AI

03

Building Reports with AI

Live demos: HTML report and R Shiny report via MCP Server

04

Publishing Service Deployments & SQL Reports using Civis Platform's UI

Deployment templates, SQL reports, scheduling, sharing, and launching reports

05

Tableau & Public Links

Tableau server access, sharing with external stakeholders

06

Q&A

You ask the questions and we have the answers

Reporting options with Civis Platform

Tableau

Build dashboards in Tableau Desktop, connected to your Redshift database. Publish to the Civis Tableau Server via VPN.

SQL

Create visual reports directly from SQL queries. Choose Bar, Line, or Scatter charts, customize colors and labels.

HTML

Upload a single HTML file as a standalone report. Connect to a Git repo or edit directly in the Platform editor.

Services

Deploy interactive apps (R Shiny, Streamlit, Flask) as reports. Code lives in Git, runs in Docker, scales with compute resources.

These are the reporting options Civis directly supports.
Users can also connect data from Platform to external BI tools like Looker Studio or Power BI.

GETTING STARTED

Ways to build and share reports

Platform UI

SQL reports

Write a query and generate a bar or scatter chart directly in the Publish menu.

Custom HTML

Upload an HTML file or connect a GitHub repo in the Platform editor.

Service templates

Launch Shiny, Streamlit, or Flask apps using the built-in templates under Publish > Services.

AI + MCP Server

Claude Desktop

Connect Claude to your Platform instance via the Civis MCP Server Docker image.

Claude Code/Copilot in VSCode

Use GitHub Copilot or Claude Code with the same MCP Server for natural-language Platform interaction.

Civis Studio

The MCP Server comes pre-installed — no additional setup required.

Tableau

Connect to Redshift

Build dashboards in Tableau Desktop connected to your Civis Redshift database.

Publish to Platform

Publish to the Civis Tableau Server via VPN — reports automatically appear in Platform.

Share broadly

Share with Platform users or generate public links for stakeholders without a login.

PART ONE

The Civis MCP Server

Setting up AI-powered Platform access locally

THE CIVIS MCP SERVER

What is the Civis 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

Demo: Setting up the MCP Server

► SCREEN SHARE

“Set up Civis MCP Server”

Claude conversation — configuring Docker + API key + Claude Desktop

Demo: Building an HTML Report with Claude

► SCREEN SHARE

“Build HTML Report for Civis Platform”

Claude conversation — generating and publishing an HTML report via MCP

PART FOUR

Publishing & Sharing in Platform

The full report lifecycle in the Platform UI

PUBLISHING IN PLATFORM

Launching and sharing a report

01

Navigate to Publish

From the top nav bar, click Publish > Reports (View All) or Publish > Services for new deployments.

02

Create the Report

Choose SQL, Custom HTML, or a Service template (Shiny, Streamlit, Flask). Fill in the Git repo, Docker image, and resource settings.

03

Start Deployment

Click Start Deployment. A preview loads on the service page. Click View Report to access the live URL.

04

Share with Your Team

Use the Sharing icon to share with users or groups. Reports can be shared independently from the underlying Service or data. Public links are also available.

Tip: Add ?fullscreen=true to any report URL to share a full-screen view. All reports can also be added to Projects for easy organization.

PART TWO

Service Deployments on Civis Platform

Configuring, Docker, and deploying apps — then a live R Shiny demo

SERVICE DEPLOYMENTS

Deploying interactive apps on Civis Platform

What Service deployments are

Services let you host web applications directly on Civis Platform. Your app can access your Redshift database, run custom code, and respond to users in real time. Platform handles compute, scaling, and infrastructure.

Supported frameworks

R Shiny

Interactive dashboards built in R

Python Streamlit

Data apps and dashboards built in Python

Flask

Python-based REST APIs and lightweight web apps

How it works

Code lives in Git

Point Platform at your GitHub repo, branch, and file path. Code is pulled at deployment time.

Environment defined by Docker

A Docker image provides the runtime — use a Civis public image or bring your own.

Resources are configurable

Set memory, CPU, and replica count. Scale up for high-traffic apps with a few clicks.

Scheduling controls uptime

On Demand, Specific Times, or Always On — only pay for compute when running.

SERVICE DEPLOYMENTS

Sharing services with public links

How to generate a public link

On your service page, open **Security & Access** and find the **Service Tokens** section. Give the token a name, set an expiration, then click **Generate Public URL And Copy To Clipboard**. The link is immediately shareable and works for anyone — no Platform login required.

Deep linking

As you navigate within a service report, the browser URL updates automatically. Copy and share that URL to send colleagues directly to a specific view or page within your app.

Things to know

Service must be running

On Demand scheduling won't work with public links — the service needs to be up when someone clicks the URL. Use Always On or Specific Times instead.

Link expires with the token

Default expiration is 1 day. Set a longer expiration when generating the token if the link needs to last. Rotate tokens regularly to limit exposure.

No Platform login needed

Anyone with the link can view the app. Note that Platform user info (username, org) is not passed to the app when accessed this way.

SERVICE DEPLOYMENT

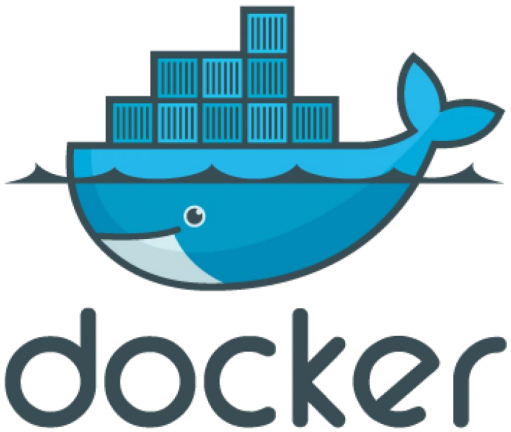
Docker images: environments for your Service

What is a Docker image?

A Docker image is a packaged snapshot of an environment.

What are they used for on Civis Platform?

Every Service deployment requires a Docker image.



Public Civis images (use as-is)

civis-services-shiny
R Shiny app deployments

civis-services-streamlit
Python Streamlit app deployments

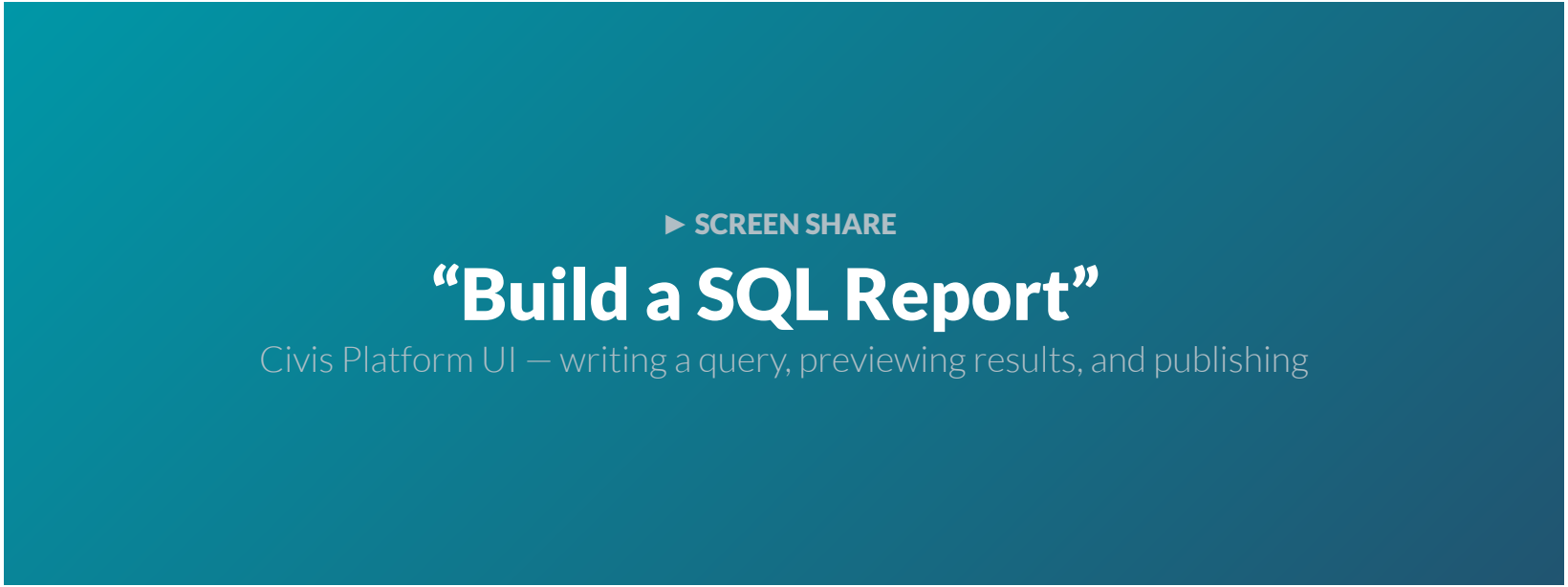
civis-services-flask
Flask API deployments

How to build a custom image

1. Write a Dockerfile that extends a Civis base image (e.g. FROM civisanalytics/civis-services-shiny)
2. Add custom packages or system dependencies
3. Build and push to a registry (DockerHub, ECR, GitHub Container Registry)
4. Reference the image name + tag in your Service Deployment config

Demo: Launching R Shiny via Platform UI

Demo: Building a SQL Report in Civis Platform



Demo: Launching R Shiny with Claude

► SCREEN SHARE

“Set Up R Shiny Service Using Code”

Claude conversation — configuring Git, Docker image, resources, and scheduling

PART FIVE

Tableau Reports on Civis Platform

Connecting to your Redshift database and publishing dashboards

TABLEAU REPORTS

Building and publishing Tableau dashboards

How it works

Connect Tableau Desktop to your Redshift database, build your dashboard, then publish it to the Civis Tableau Server. Reports automatically appear in Platform under Publish > Reports.

Tableau Server access

Clients get Tableau Server access through Civis. You will need a Tableau Creator or Cloud license, plus VPN access to publish (only publishers need VPN; viewers do not).

Supported versions

Civis supports Tableau Desktop up to version 2025.1.8.X. Use an extract (not live connection) for best performance; extracts can refresh on a schedule.

Publishing steps

1. Sign into Civis VPN

Ensure you are signed into Civis Platform and connect via the AWS VPN Client.

2. Sign in to Tableau Server

Server > Sign In using https://tableau.internal.civisanalytics.com

3. Publish your workbook

Server > Publish Workbook. Enable “Show Sheets as Tabs.”

User Filters

Permission views by user — one workbook shows the right data for each person. Ask Civis for setup help.

SHARING & ACCESS

Public links for external stakeholders

What are public links?

Public links allow sharing Tableau reports with stakeholders who do not have a Civis Platform login. Anyone with the link can view the specific report — they cannot navigate to any other Platform page.

How to request one

Contact us via the Help menu in the bottom-right of the Civis Platform interface. We will configure the public link and provide you with the URL.

Security note

Anyone with the link can access the report — no login required.

Best practices:

Always set an expiration date to limit access duration

Only share with intended recipients — treat the URL like a password

Review active public links periodically and revoke any that are no longer needed

Q&A

Any questions?

SQL REPORTS

Building SQL-based reports directly in Platform

01

Create the Report

Go to Publish > SQL. Write your query in the editor and click Run to preview the result set.

02

Choose a Visualization

Pick Bar or Scatter chart. Select columns for your X-axis and one or more columns for the Y-axis.

03

Customize & Save

Add a title, description, axis labels, and custom colors. Click Save Report in the lower right when you're done.

04

Keep It Fresh

Whenever your data updates, open the report and click Refresh Report to re-run the query and update the chart.

Available chart types: Bar chart and Scatter chart. Crosstab and other templates also available via More Report Templates in the Publish menu.