Vertica Knowledge Base Article

Vertica Partner QuickStart for Tableau: Ticket Tracking

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Vertica Partner QuickStart for Tableau: Ticket Tracking

The Vertica Partner QuickStart for Tableau is a sample business intelligence application implemented as a set of Tableau dashboards powered by the Vertica Analytic Database. The dashboards present sample support ticket tracking status for analysis. The QuickStart shows how you can use Vertica and Tableau to quickly explore, visualize, and gain insight into your data stored in Vertica.

The Ticket Tracking QuickStart was developed by Tableau and adapted by the Vertica Partner Engineering team to use Vertica.

About the Vertica QuickStarts

The Vertica QuickStarts are free, sample applications created using front-end products from Vertica technology partners.

The Vertica QuickStarts are posted for download on my.vertica.com/quickstart.

For an overview, watch this short video.

> Note The Vertica QuickStarts are freely available for demonstration and educational purposes. They are not governed by any license or support agreements and are not suitable for deployment in production environments.

About Tableau

Tableau Software provides visualization and business intelligence products, including Tableau Desktop, Tableau Server, Tableau Online, and Tableau Mobile. For details, see the Tableau website.

Requirements

The Partner QuickStart for Tableau requires a Vertica database server with the Support schema, the Vertica ODBC client driver, and Tableau Desktop 10.0 or later.

The QuickStart was tested with Tableau 10.0 and Vertica 8.0.

Installation and Setup

To install the software that is required for running the QuickStart, follow these steps:

- Install Tableau
- Install the Vertica Database Server
- Install the Client Driver

Install Tableau

Tableau runs on Windows or Mac OS. If you do not have Tableau Desktop 10.0, follow these steps to install a free trial:

1. Go to the Tableau website.
2. Click **Try Now**.
3. Enter your email.
4. Click **Download Free Trial**.
5. Launch the executable.
6. Follow the prompts to install Tableau.

Install the Vertica Database Server

Vertica runs on Linux platforms. If you do not already have Vertica, you can download the Community Edition free of charge:

1. Navigate to my.vertica.com.
2. Log in or click **Register Now** to create an account
3. On the Downloads menu, click **Community Edition.**
4. Follow the on-screen instructions to download and install the Vertica Community Edition.

Install the Client Driver

Tableau uses ODBC to connect to Vertica. Before you can connect Tableau to Vertica, you must download and install the Vertica client package that includes the ODBC driver.

To download and install the Vertica client package:

1. Go to the Vertica Client Drivers page.
2. Download the Vertica client package that matches your operating system and the version of Vertica that you are using.
3. Follow the steps for installing the Vertica client as described in the Vertica documentation.

> Note Vertica drivers are forward compatible. You can connect to the Vertica server using previous versions of the client. For more information, see Client Drivers and Server Version Compatibility in the Vertica documentation.

Download the QuickStart

1. Navigate to my.vertica.com/quickstart
2. Select **Vertica Partner QuickStart for Tableau.**
3. Log in or create an account.
4. Click **Download**.

Create the Support Schema

The data used by the Vertica Partner QuickStart for Tableau is stored in the TicketTracking table in the Support schema. Before you can use the QuickStart, you must create the schema.

To create the schema, follow these steps:

1. Place the SupportTicketTrackingScript.sql file in the /tmp/ directory on the Linux system where the Vertica database is installed.

2. Open a vsql session.

3. Run the following command from vsql to execute the script:

```
=> \i /tmp/SupportTicketTrackingScript.sql
```

You can confirm that the schema and table were created by typing \d in vsql.

Load the Data

After you create the schema, you must load the data from the CSV file by following these steps:

1. Move the Support.TicketTracking.csv file to the /tmp path on the Linux system where the Vertica database is installed.

2. Connect using vsql to the database where you created the Support schema.

3. Run the following command:

```
=> COPY Support.TicketTracking FROM
'/tmp/SupportTicketTracking.csv' ENCLOSED BY "" DELIMITER ','
SKIP 1 ABORT ON ERROR DIRECT;
```

You can confirm that the data was loaded by executing the following statement:

```
=> SELECT count(*) FROM support.TicketTracking;
```

Connect the Tableau Workbook to Vertica

To open the QuickStart and connect to Vertica, follow these steps:

1. Start Tableau and open the Support Ticket Tracking.twb Tableau workbook file.

2. From the **Sign In** dialog box, click **Edit Connection**.

3. In the Server Connection dialog box, enter the following:
   - **Server name or IP address**
   - **Database name**
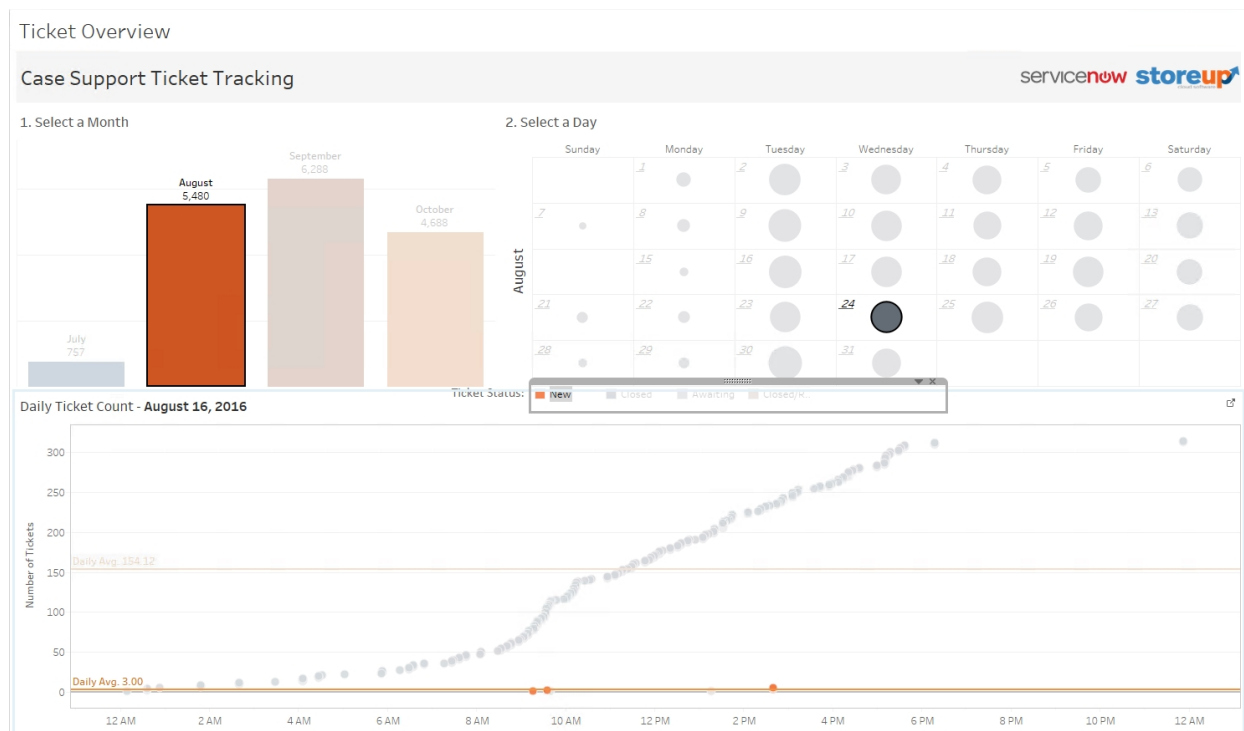   - **Username**
   - **Password**

4. Click **Sign In** to connect to Vertica.

QuickStart Example Dashboards

The QuickStart dashboards present sample support ticket data that a Support organization might use to track support cases and customer issues. The company could use this information to understand which months are busier than others to better serve their customers.
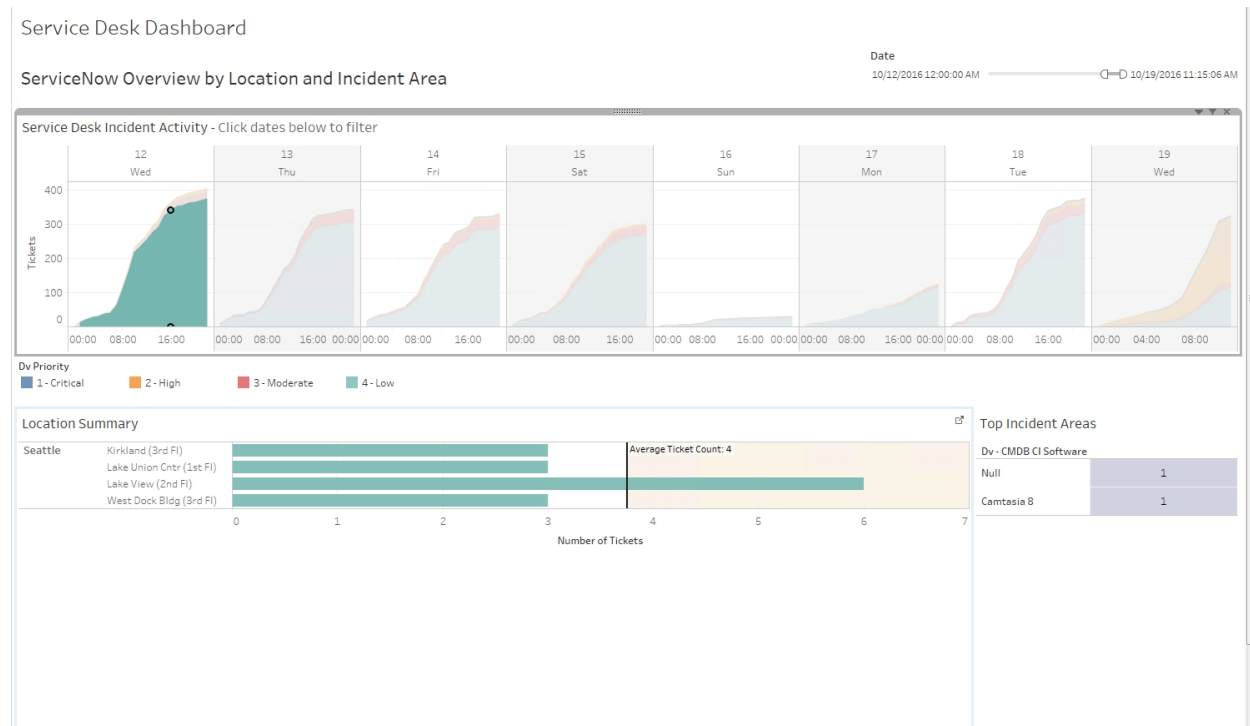
Ticket Overview Dashboard

The Case Support Ticket Tracking dashboard shows an overview status of the support ticket, along with the corresponding month that you select. You can drill down further into a particular month to check the status of the tickets:

Service Desk Dashboard

The Service Desk dashboard shows an overview of the priority of tickets based on location. In the following instance, you can see the status of tickets from a few days in October. You can distinguish between ticket priority based on the color. As we can see, most tickets were low priority, with a few falling in the moderate range:

For More Information

- Tableau
- Vertica Integration With Tableau: Connection Guide
- Vertica Integration With Tableau: Tips and Techniques
- Vertica QuickStart for Tableau (VMart)
- Vertica Community Edition
- Vertica User Community
- Vertica Documentation