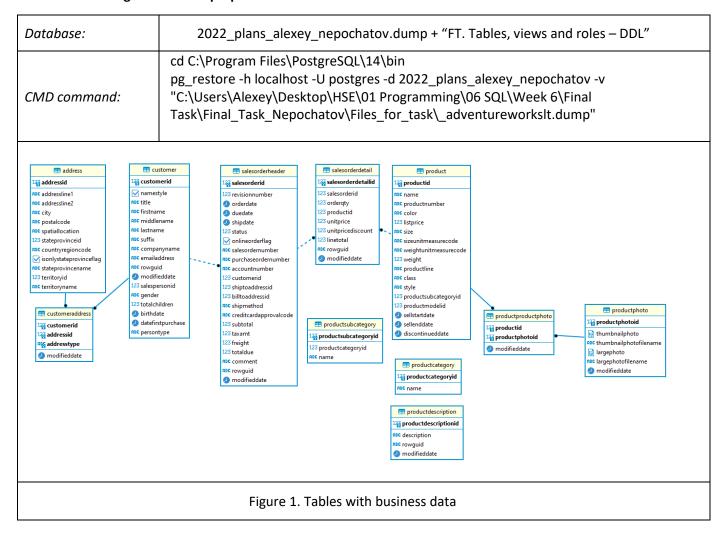
# SQL Course Final Task by Alexey Nepochatov. HSE MDS. 2022.

# Content:

•	Before begin. Database preparation	2
	Task №1. Access settings.	
	Task №2. product2 & country 2 materialized views	
	Task №3. Loading data into the company table	
	Task №4. Company classification.	
	Task №5. Finding quarterly sales amount by company, and product category	
	Task №6. Initial data preparation.	
•	Task №7. Changing plan data	12
•	Task №8. Plan data approval	15
•	Task Nº9, Data preparation for plan-fact analysis in O1 2014	17

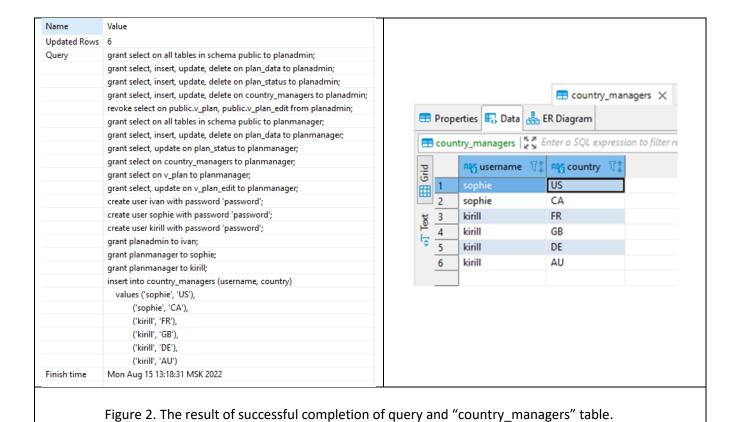


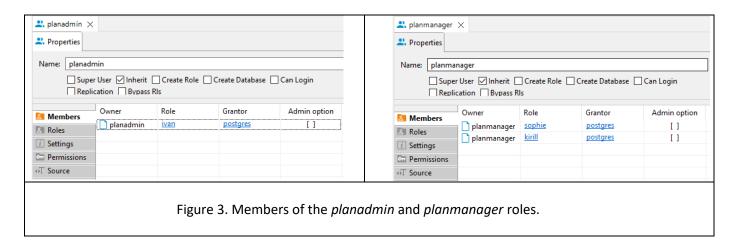
#### Before begin. Database preparation.



#### Task №1. Access settings.

```
grant select on all tables in schema public to planadmin;
grant select, insert, update, delete on plan_data to planadmin;
grant select, insert, update, delete on plan_status to planadmin;
grant select, insert, update, delete on country managers to planadmin;
revoke select on public.v_plan, public.v_plan_edit from planadmin;
grant select on all tables in schema public to planmanager;
grant select, insert, update, delete on plan data to planmanager;
grant select, update on plan status to planmanager;
grant select on country managers to planmanager;
grant select on v plan to planmanager;
grant select, update on v_plan_edit to planmanager;
create user ivan with password 'password';
create user sophie with password 'password';
create user kirill with password 'password';
grant planadmin to ivan;
grant planmanager to sophie;
grant planmanager to kirill;
insert into country_managers (username, country)
      values ('sophie', 'US'),
                    ('sophie', 'CA'),
('kirill', 'FR'),
('kirill', 'GB'),
                    ('kirill', 'DE'),
                    ('kirill', 'AU');
```



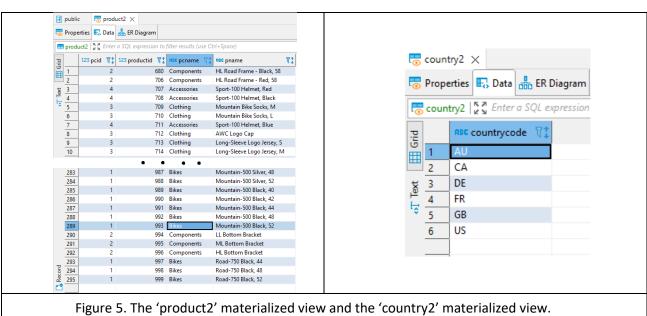


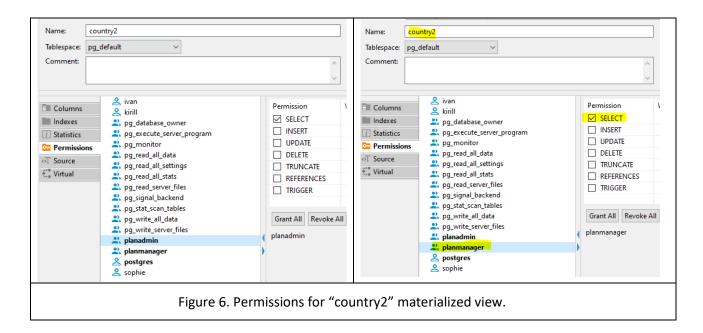


### Task №2. product2 & country 2 materialized views.

```
The 'product2' view query:
```

```
create materialized view product2 as
    select
       pc.productcategoryid
                                  as pcid,
       p.productid
                                  as productid,
       pc."name"
                                  as pcname,
       p."name"
                                  as pname
    from product as p
    join productsubcategory as psc
       on p.productsubcategoryid = psc.productsubcategoryid
    join productcategory as pc
       on psc.productcategoryid = pc.productcategoryid
with no data;
refresh materialized view product2;
The 'country2' view query:
create materialized view country2 as
       select distinct a.countryregioncode as countrycode
       from customer as c
              join customeraddress as ca
                     on c.customerid = ca.customerid
              join address as a
                     on ca.addressid = a.addressid
       where ca.addresstype in ('Main Office')
with no data;
refresh materialized view country2; Query to allow managers and administrators to read from these
views:
grant select on product2 to planadmin;
grant select on product2 to planmanager;
grant select on country2 to planadmin;
grant select on country2 to planmanager;
 public public
      ₹ product2 ×
```





Name: product2 Name: product2 Tablespace: pg\_default Tablespace: pg\_default Comment: Comment: Permission **Columns** Permission Columns 🙎 kirill 🙎 kirill ✓ SELECT ✓ SELECT Indexes pg\_database\_owner Indexes pg\_database\_owner ☐ INSERT ☐ INSERT pg\_execute\_server\_program i Statistics pg\_execute\_server\_program Statistics □ UPDATE UPDATE pg\_monitor pg\_monitor Permissions Permissions pg\_read\_all\_data □ DELETE pg\_read\_all\_data □ DELETE ⇔T Source ⇔T Source pg\_read\_all\_settings ☐ TRUNCATE pg\_read\_all\_settings ☐ TRUNCATE € Virtual € Virtual pg\_read\_all\_stats pg\_read\_all\_stats REFERENCES □ REFERENCES pg\_read\_server\_files pg\_read\_server\_files ☐ TRIGGER ☐ TRIGGER pg\_signal\_backend pg\_signal\_backend pg\_stat\_scan\_tables pg\_stat\_scan\_tables 2 pg\_write\_all\_data Grant All Revoke Al Grant All Revoke Al 2 pg\_write\_all\_data pg\_write\_server\_files

Figure 7. Permissions for "product2" materialized view.

planadmin

2. planadmin

postgres

sophie 2

🙎 planmanager

pg\_write\_server\_files

planadmin

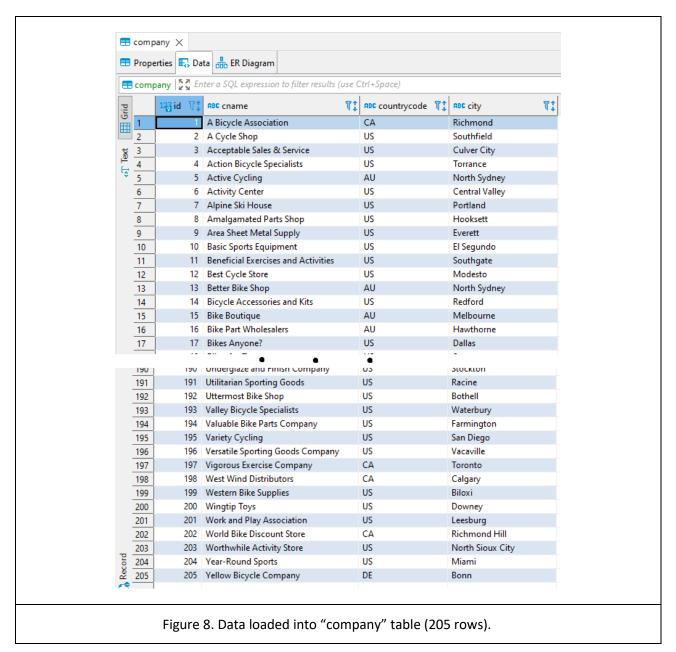
postgres

sophie

🎎 planmanager

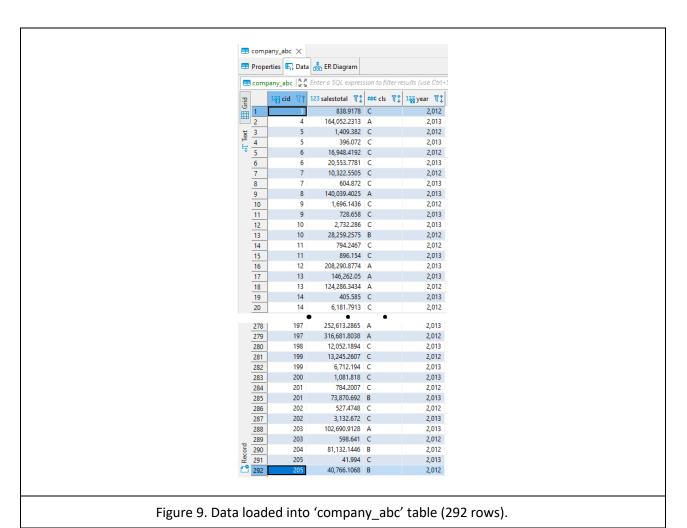
planmanager

#### Task №3. Loading data into the company table.



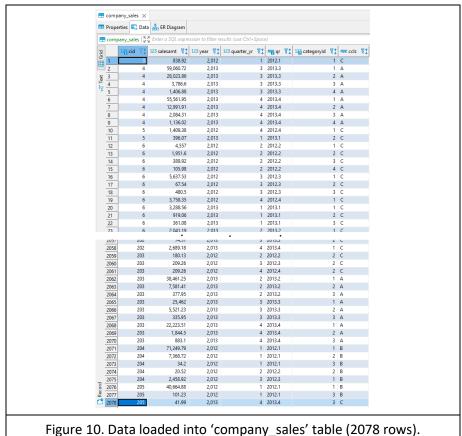
#### Task №4. Company classification.

```
insert into company_abc
select s.cid,
      s.salestotal as salestotal,
             when ((sum(s.salestotal) over(partition by s."year" order by s.salestotal desc))
/ (sum(s.salestotal) over(partition by s."year"))) <= 0.8 then 'A'</pre>
             when ((sum(s.salestotal) over(partition by s."year" order by s.salestotal desc))
/ (sum(s.salestotal) over(partition by s."year"))) <= 0.95 then 'B'</pre>
             else 'C'
             end as cls,
      s.year
from (
      select c.id as cid,
             extract(year from orderdate) as "year",
             sum(so.subtotal) as "salestotal"
      from company as c
             join customer as cs
                    on cs.companyname = c.cname
             join salesorderheader as so
                    on so.customerid = cs.customerid
                           where extract(year from so.orderdate) in (2012, 2013)
      group by c.id,
      extract(year from orderdate)
        ) as s;
```



#### Task №5. Finding quarterly sales amount by company, and product category.

```
insert into company_sales
select
      c.id as cid,
                                                                   -- Company key
      sum(sod.linetotal) as salesamt,
                                                                   -- Total amount sold
      extract('year' from soh.orderdate) as "year",
                                                                   -- Year
      extract('quarter' from soh.orderdate) as quarter_yr,
                                                                   -- Quarter of year
      to_char(soh.orderdate, 'YYYY.Q') as qr,
                                                                   -- Quarter
      p_2.pcid as categoryid,
                                                                   -- Product category's key
      c abc.cls as ccls
                                                                   -- Company's class code
from
      salesorderheader as soh
      join salesorderdetail as sod
             using (salesorderid)
      join customer as cst
             using(customerid)
      join company as c
             on cst.companyname = c.cname
      join product2 as p 2
             using(productid)
      join company_abc as c_abc
             on c_abc.cid = c.id
                   where c_abc."year" = extract('year' from soh.orderdate)
group by extract('year' from soh.orderdate),
             extract('quarter' from soh.orderdate),
             to_char(soh.orderdate, 'YYYY.Q'),
             c.id,
             p_2.pcid,
             c_abc.cls
order by cid;
```

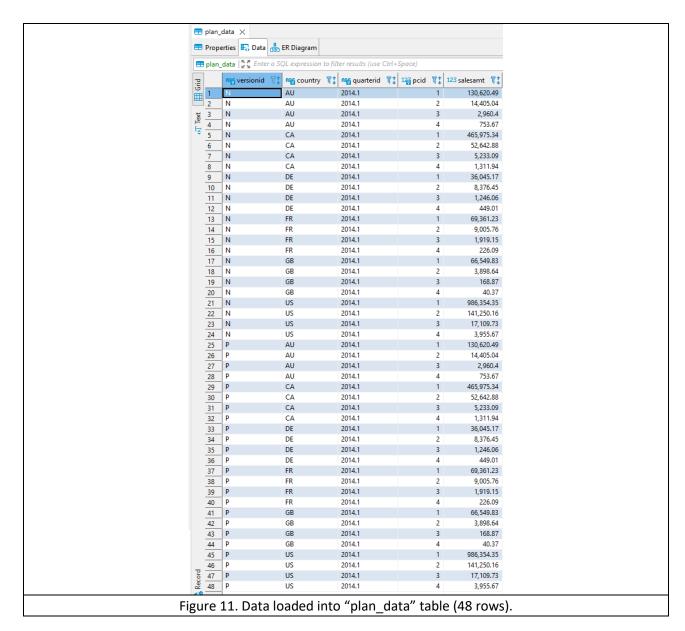


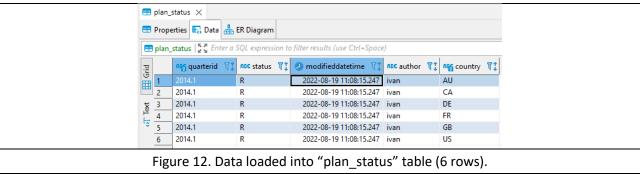
#### Task №6. Initial data preparation.

```
import psycopg2
def start planning (year, quarter, user, pwd):
    con = psycopg2.connect(database='2022_plans_alexey_nepochatov',
                           user=user,
                           password=pwd,
                           host='localhost')
    cur = con.cursor()
    year quarter = str(year) + '.' + str(quarter)
        # Delete plan data from the plan_data table related to the target year and quarter.
        cur.execute(f"""delete from plan data as pd where pd.quarterid in ({year_quarter}::text)""")
        # In the plan status table delete records related to the target quarter
        cur.execute(f"""delete from plan status as ps where ps.quarterid in ({year quarter}::text)""")
        \# Create planning status records (plan_status table) for the selected quarter.
        cur.execute(f"""
        insert into plan_status(quarterid, status, modifieddatetime, author, country)
        select
            {year_quarter}::text as quarterid, -- Key of planning quarter
                     as status,
                                                -- Planning data slice status
                      as modifieddatetime, -- Time when the record was changed-created as author, -- User that changed the record
            now()
            user
                                               -- Country of a shop
           countrycode as country
        from country2;""")
        # Generate version N of planning data in the plan data table
        cur.execute(f"""
        insert into plan data
        select 'N' as versionid,
                                                              -- Version of plan
            country product.country as country,
                                                             -- Country of a shop
                                                             -- Key of planning quarter
            {year quarter}::text as quaterid,
            country product.pcid as pcid,
                                                             -- Product category's key
            coalesce(avg(s.salesamt),0) as salesamt
                                                             -- Sales amount before taxes
        from (
            select c2.countrycode as country,
              p.pcid
            from country2 as c2
            cross join product2 as p
               where p.pcid is not null
            ) as country product
            join (
                select c.countrycode as country,
                cs.qr as quaterid,
                cs.categoryid as pcid,
               sum(cs.salesamt) as salesamt
            from company as c
            join company sales as cs
                on cs.cid =c.id
                    where cs.ccls in('A', 'B')
                        and cs."year" in({year}-2, {year}-1)
                        and cs.quarter yr in({quarter})
            group by c.countrycode ,
                cs.qr,
                cs.categoryid
                ) as s
                   using(country)
                       where s.pcid=country product.pcid
        group by country product.country,
           country_product.pcid
        order by 2, 4
        cur.execute(f"""
        insert into plan data (versionid, country, quarterid, pcid, salesamt)
            select 'P' as versionid,
                pd.country as country,
                pd.quarterid as quarterid,
                pd.pcid as pcid,
                pd.salesamt as salesamt
            from plan data as pd
            where pd.quarterid in({year_quarter}::text)
                and versionid in('N');
                """)
```

```
finally:
    con.commit()
    con.close()

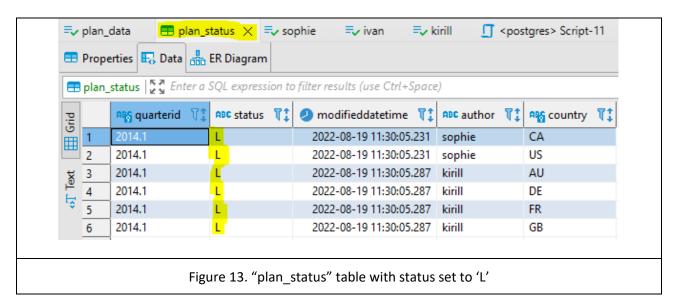
if __name__ == '__main__':
    start_planning(2014, 1, 'ivan', 'password')
```

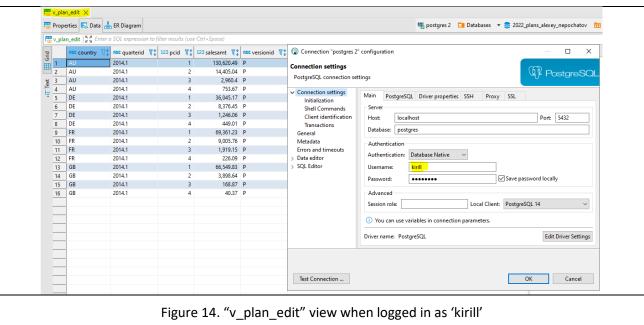


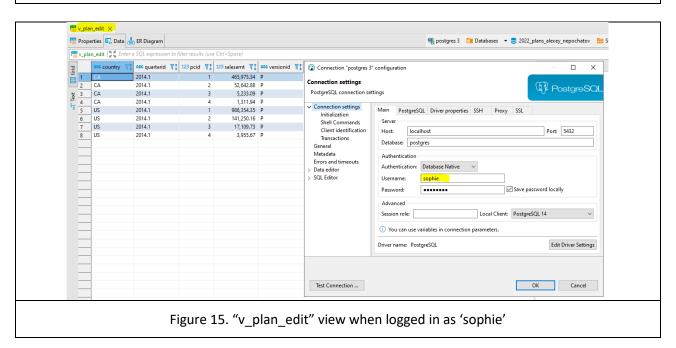


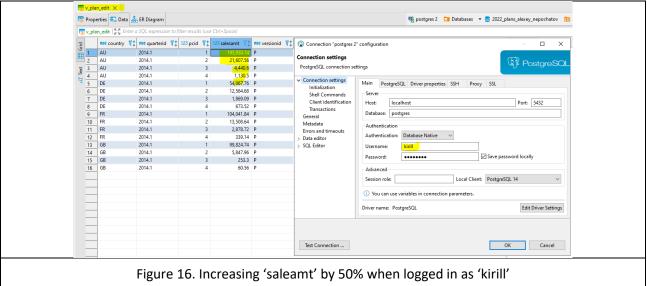
#### Task №7. Changing plan data.

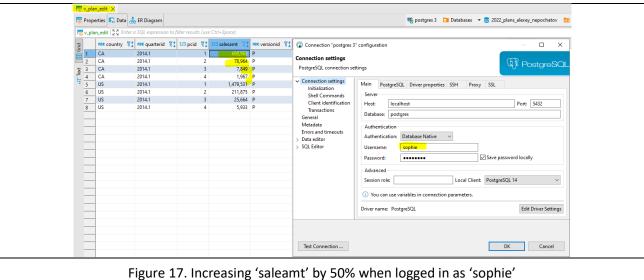
```
def set lock(year, quarter, user, pwd):
    con = psycopg2.connect(database='2022 plans alexey nepochatov',
                           user=user,
                           password=pwd,
                           host='localhost')
    cur = con.cursor()
    year quarter = str(year) + '.' + str(quarter)
    try:
        cur.execute(f"""
        update plan status as ps
        set status = 'L',
            modifieddatetime = now(),
            author = current user
                where ps.quarterid = {year quarter}::text
                    and ps.status = 'R'
                    and country in (
                        select cm.country
                        from country managers as cm
                            where cm.username = current user)
        """)
    finally:
        con.commit()
        con.close()
def remove lock(year, quarter, user, pwd):
    con = psycopg2.connect(database='2022 plans alexey nepochatov',
                           user=user,
                           password=pwd,
                           host='localhost')
    cur = con.cursor()
    year quarter = str(year) + '.' + str(quarter)
    try:
        cur.execute(f"""
        update plan status as ps
        set status = 'R',
            modifieddatetime = now(),
            author = current user
                where ps.quarterid = {year quarter}::text
                    and ps.status = 'L'
                    and country in (
                        select cm.country
                        from country managers as cm
                            where cm.username = current user)
        """)
    finally:
       con.commit()
        con.close()
if name == ' main ':
    set lock(2014, 1, 'sophie', 'password')
    set lock(2014, 1, 'kirill', 'password')
```





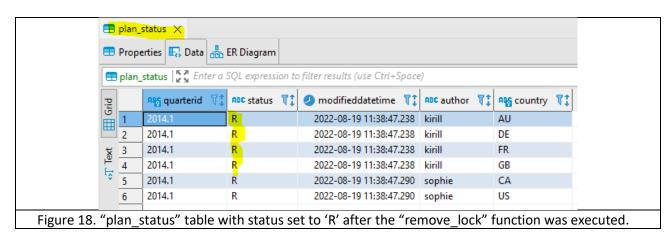






## Executing the "remove\_lock" function

```
_name__ == '__main__':
remove_lock(2014, 1, 'kirill', 'password')
remove lock(2014, 1, 'sophie', 'password')
```



#### Task №8. Plan data approval.

```
def accept plan(year, quarter, user, pwd=''):
    con = psycopg2.connect(database='2022 plans alexey nepochatov',
                            user=user,
                            password=pwd,
                            host='localhost')
    cur = con.cursor()
    year quarter = str(year) + '.' + str(quarter)
    trv:
        # Clear the A version of plan data
        cur.execute(f"""
            delete from plan data as pd
            where pd.quarterid = {year_quarter}::text
                    and pd.versionid = 'A'
                    and pd.country in (
                        select cm.country
                             from country managers as cm
                                 where cm.username = current user)
        # Read data and save its copy into as the version A
        cur.execute(f"""
            insert into plan data
            select 'A' as versionid,
                    pd.country as country,
                    pd.quarterid as quarterid,
                    pd.pcid as pcid,
                    pd.salesamt as salesamt
            from plan data as pd
            where pd.quarterid = {year quarter}::text
                and pd.versionid = 'P'
                and pd.country in (
                     select cm.country
                     from country managers as cm
                        where cm.username=current user)
                and pd.country in (
                    select ps.country
                    from plan status as ps
                    where ps.quarterid = {year quarter}::text
                         and ps.status = 'R')
                     """)
        # Change the status of data being processed from 'R' to 'A'
        cur.execute(f"""
            update plan status as ps
            set status = 'A',
            modifieddatetime = now(),
            author = current user
                where ps.quarterid = {year quarter}::text
                    and ps.status = 'R'
                    and country in (
                         select cm.country
                         from country managers as cm
                             where cm.username = current user)
    finally:
        con.commit()
        con.close()
if __name__ == '__main__':
    accept_plan(2014, 1, 'kirill', 'password')
    accept_plan(2014, 1, 'sophie', 'password')
```

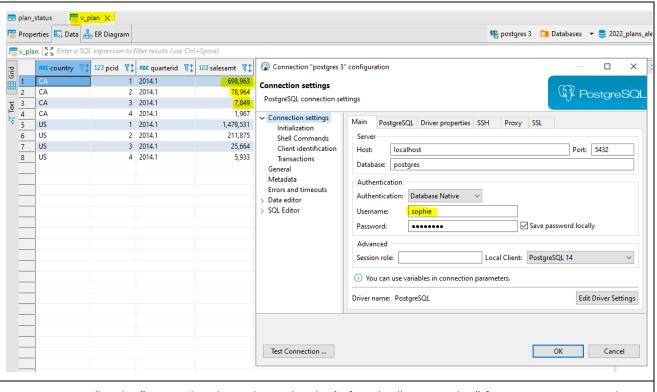
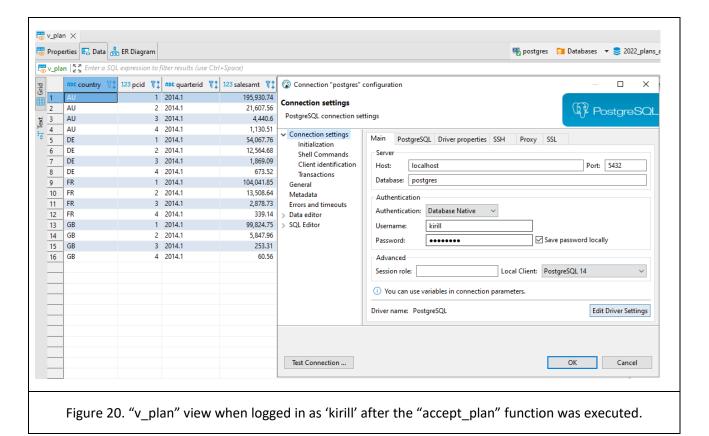
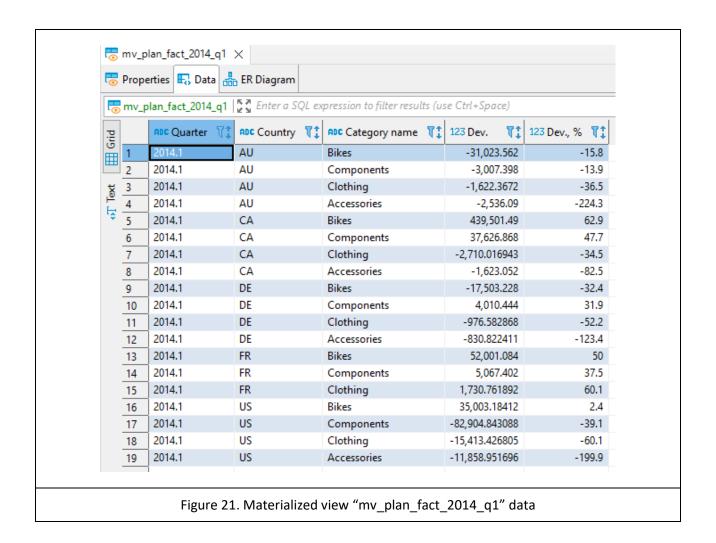


Figure 19. "v\_plan" view when logged in as 'sophie' after the "accept\_plan" function was executed.



#### Task №9. Data preparation for plan-fact analysis in Q1 2014.

```
create materialized view mv_plan_fact_2014_q1 as
select
    quarterid as "Quarter",
    country as "Country",
    category_name as "Category name",
    plan.salesamt - fact.salesamt as "Dev.",
   round((plan.salesamt - fact.salesamt)/plan.salesamt * 100, 1) as "Dev., %"
from
    (select
          c.countrycode as country,
          p2.pcid,
          p2.pcname as category name,
          sum(sod.linetotal) as salesamt
    from
          salesorderheader as soh
          join customer as cst
                 using (customerid)
          join salesorderdetail as sod
                 using(salesorderid)
          join product2 as p2
                 using (productid)
          join company as c
                 on c.cname = cst.companyname
   where extract('year' from soh.orderdate) in('2014')
      and extract('quarter'from soh.orderdate) in('1')
      and c.id in (
          select abc.cid
          from company_abc as abc
                 where abc."year" in('2013')
                   and abc.cls in('A', 'B'))
    group by c.countrycode,
                  p2.pcid,
                  p2.pcname) as fact
join
    (select * from plan_data as pd
          where pd.versionid = 'A') as plan
                 using(country)
                       where plan.pcid = fact.pcid
with no data;
refresh materialized view mv_plan_fact_2014_q1;
```



#### **Dump database:**

