$Module_3_duckdb\text{-}key$

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Learning Objectives (Module 3)

By the end of this module, you will be able to:

- Understand when to choose DuckDB over Arrow for analytical workloads
- Connect R to DuckDB databases for high-performance analytics
- Execute complex joins and window functions on large datasets
- Leverage SQL and dplyr interchangeably for data analysis
- Optimize analytical queries for multi-gigabyte datasets
- Build persistent analytical databases for reproducible research

The Mindset Shift: From Files to Database

Arrow vs. DuckDB: When to Use What?

```
Arrow thinking (Module 2):
```

```
# Great for: Reading, filtering, format conversion
open_dataset("file.parquet") |>
  filter(year == 2023) |>
  collect()
```

DuckDB thinking (Module 3):

```
# Great for: Complex analytics, joins, aggregations
#con <- dbConnect(duckdb())
#seattle_tbl <- tbl(con, "seattle_checkouts")

seattle_tbl |>
  window_rank(CheckoutYear, Checkouts) |>
  complex_join(other_table) |>
  collect()
```

Key Concept: In-Process Analytics Database

DuckDB is like having a **miniature data warehouse** running inside R:

- In-process: Runs directly in your R session (no separate server needed)
- Columnar: Optimized for analytical queries (fast aggregations)
- SQL + dplyr: Speaks both languages fluently
- Persistent: Can save your work and reuse it later

Think of it like:

- Arrow: "A really smart file reader"
- DuckDB: "A personal analytics database"

Rule of thumb:

- Simple filtering/reading: Use Arrow
- Complex analytics/joins: Use DuckDB
- Multiple related tables: Definitely DuckDB
- Window functions/advanced SQL: DuckDB shines

DuckDB Setup

Load Your Enhanced Toolkit

```
# Enhanced package loading for database analytics
required_packages <- c("tidyverse", "arrow", "duckdb", "DBI", "dbplyr", "glue")

# Install missing packages
for (pkg in required_packages) {
   if (!requireNamespace(pkg, quietly = TRUE)) {
      install.packages(pkg)
   }
}

# Load all packages
for (pkg in required_packages) {</pre>
```

```
Warning: package 'tidyverse' was built under R version 4.3.3
Warning: package 'tibble' was built under R version 4.3.3
Warning: package 'tidyr' was built under R version 4.3.3
Warning: package 'readr' was built under R version 4.3.3
Warning: package 'purrr' was built under R version 4.3.3
Warning: package 'dplyr' was built under R version 4.3.3
Warning: package 'stringr' was built under R version 4.3.3
Warning: package 'forcats' was built under R version 4.3.3
Warning: package 'lubridate' was built under R version 4.3.3
-- Attaching core tidyverse packages ----- tidyverse 2.0.0 --
v dplyr
          1.1.4
                   v readr
                                2.1.5
v forcats 1.0.0
                   v stringr 1.5.1
v ggplot2 3.5.2 v tibble 3.2.1
v lubridate 1.9.3 v tidyr 1.3.1
          1.0.2
v purrr
-- Conflicts ----- tidyverse_conflicts() --
x dplyr::filter() masks stats::filter()
x dplyr::lag() masks stats::lag()
i Use the conflicted package (<a href="http://conflicted.r-lib.org/">http://conflicted.r-lib.org/</a>) to force all conflicts to become
Warning: package 'arrow' was built under R version 4.3.3
```

library(pkg, character.only = TRUE)

```
Attaching package: 'arrow'

The following object is masked from 'package:lubridate':
   duration

The following object is masked from 'package:utils':
   timestamp

Warning: package 'duckdb' was built under R version 4.3.3

Loading required package: DBI

Warning: package 'DBI' was built under R version 4.3.3

Warning: package 'dbplyr' was built under R version 4.3.3

Attaching package: 'dbplyr'

The following objects are masked from 'package:dplyr':
   ident, sql

Warning: package 'glue' was built under R version 4.3.3
```

Create Dataset Reference

Make sure to get your referenced .csv with open_dataset(). Similar to how you would use read_csv() but we are not reading in a file:

```
seattle_csv <- open_dataset(
  sources = "data/seattle-library-checkouts.csv",
  col_types = schema(ISBN = string()),
  format = "csv"
)</pre>
```

Check Our Data Setup

Let's verify we have our data files from Module 2:

```
# Check if we have our CSV file
csv_exists <- file.exists("data/seattle-library-checkouts.csv")
parquet_exists <- dir.exists("data/parquet/seattle")

glue("CSV file exists: {csv_exists}")

CSV file exists: TRUE

glue("Parquet files exist: {parquet_exists}")

Parquet files exist: TRUE

if (csv_exists) {
   file_size_gb <- file.size("data/seattle-library-checkouts.csv") / (1024~3)
   glue("CSV file size: {round(file_size_gb, 2)} GB")
}</pre>
```

CSV file size: 8.58 GB

Note: We already created Parquet files in Module 2, but let's review the two approaches you can use:

Method 1: Simple Parquet - This is what we created in Module 2:

```
# Method 1: Simple Parquet (single folder, multiple files)
# Good for: Smaller datasets, simple analytics

# Save as regular Parquet files
#write_dataset(
# seattle_csv,
# path = "data/parquet/seattle_parquet",
# format = "parquet"
#)
```

Method 2: Partitioned Parquet - An alternative approach for time-series data:

```
# Method 2: Partitioned Parquet (organized by year)
# Good for: Large datasets, year-based filtering
write_dataset(
    seattle_csv,
    path = "data/parquet/seattle_by_year",
    format = "parquet",
    partitioning = "CheckoutYear" # Creates a folder for each year
)
```

Just for fun lets see compare the file sizes...

```
# Compare file sizes across all three methods

# Original CSV

csv_size_bytes <- file.size("data/seattle-library-checkouts.csv")

csv_size_gb <- csv_size_bytes / (1024^3)
glue("Original CSV size: {round(csv_size_gb, 2)} GB")</pre>
```

Original CSV size: 8.58 GB

Simple parquet size: 4.11 GB

Partitioned parquet size: 4.11 GB

Approach	Best For	Key Benefits	Trade-offs	
Simple General analytics, Parquet exploratory work, datasets < 5GB		 → Simpler file structure - easier to understand and manage → Faster initial setup - no need to think about partitioning → Universal compatibility - works with 	→ Slower filtering by year/date → Must scan entire dataset for time-based queries	
Partitione Parquet	ed Time-series analysis, production pipelines, datasets > 5GB	any analysis tool → Lightning-fast date filtering - only reads relevant year folders → Organized structure - easy to find specific time periods → Scalable - excellent performance even with massive datasets	 → More complex folder structure → Requires planning partitioning strategy → Can create many small files if over-partitioned 	

Connect to DuckDB: Your Personal Data Warehouse

```
# Create a persistent DuckDB database
# (This is like opening a new Excel workbook, but for big data)
con <- dbConnect(duckdb::duckdb(), dbdir = "data/seattle.duckdb")

# Let's see what we're working with
glue(" Connected to DuckDB database at: data/seattle.duckdb")</pre>
```

Connected to DuckDB database at: data/seattle.duckdb

What just happened?

- Created a **persistent** DuckDB database file
- Established a connection we can use throughout our session
- The database will save our work even after R shuts down

Load Our Parquet Data into DuckDB

Now we'll create a table in our database using the Parquet files we created in Module 2:

```
# This reads from the Parquet files and creates a database table
# Instead of loading all the data, we'll create a "window" to look through
# This is called a VIEW - it lets us see the data without loading it all
dbExecute(con, "
    DROP TABLE IF EXISTS seattle_checkouts;
    CREATE TABLE seattle_checkouts AS
    SELECT *
    FROM read_parquet('data/parquet/seattle_parquet/*.parquet')
")
```

[1] 41389465

```
# Verify our data loaded correctly
record_count <- dbGetQuery(con, "SELECT COUNT(*) as total FROM seattle_checkouts")
glue(" Loaded {format(record_count$total, big.mark = ',')} records into DuckDB")</pre>
```

Loaded 41,389,465 records into DuckDB

```
# Create our dplyr reference to the table
seattle_tbl <- tbl(con, "seattle_checkouts")</pre>
```

Quick Data Exploration

```
# Basic exploration using dplyr syntax
seattle_tbl |>
summarise(
   total_records = n(),
   earliest_year = min(CheckoutYear, na.rm = TRUE),
   latest_year = max(CheckoutYear, na.rm = TRUE),
   total_checkouts = sum(Checkouts, na.rm = TRUE)
) |>
collect()
```

```
# Peek at the structure
seattle_tbl |>
  head(5) |>
  collect()
```

A tibble: 5 x 12

	${\tt UsageClass}$	${\tt CheckoutType}$	${\tt MaterialType}$	${\tt CheckoutYear}$	${\tt CheckoutMonth}$	Checkouts
	<chr></chr>	<chr></chr>	<chr></chr>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>
1	Physical	Horizon	BOOK	2016	6	1
2	Physical	Horizon	BOOK	2016	6	1
3	Digital	OverDrive	EB00K	2016	6	1
4	Physical	Horizon	BOOK	2016	6	1
5	Physical	Horizon	SOUNDDISC	2016	6	1

- # i 6 more variables: Title <chr>, ISBN <chr>, Creator <chr>, Subjects <chr>,
- # Publisher <chr>, PublicationYear <chr>

What's the difference from Arrow?

With Arrow, we were always "viewing" files. With DuckDB, we've **loaded** the data into a database structure optimized for fast analytics!

Understanding SQL vs. dplyr: Two Languages, Same Ideas (10 minutes)

The Great News: You Already Know the Concepts!

This workshop is about using the dplyr that we know and love - but understanding some SQL can help you see what's happening behind the scenes. DuckDB speaks both languages fluently!

Your challenge: Create a new table called seattle_by_year using the partitioned files.

Do We Have to Use SQL?

Short answer: No! This workshop focuses on dplyr because:

- You already know dplyr syntax
- It's more intuitive and readable
- **dbplyr** automatically translates dplyr to SQL for you
- You can be productive immediately

But knowing some SQL helps because:

- You can see what dplyr is doing behind the scenes
- Some complex operations are cleaner in SQL
- You can mix both approaches when needed

Basic SQL Operations (Just for Understanding)

1. Selecting Rows (WHERE = filter())

```
# dplyr approach (what we'll use most)
seattle_tbl |>
filter(CheckoutYear == 2020) |>
head() |>
collect()
```

```
# A tibble: 6 x 12
```

```
UsageClass CheckoutType MaterialType CheckoutYear CheckoutMonth Checkouts
             <chr>
                          <chr>
                                               <dbl>
                                                             <dbl>
1 Physical
             Horizon
                          BOOK
                                                2020
                                                                 1
                                                                            2
2 Digital
             OverDrive
                          EB00K
                                                2020
                                                                 1
                                                                           12
3 Digital
             OverDrive
                          AUDIOBOOK
                                                2020
                                                                 5
                                                                            1
                                                                 5
4 Digital
             OverDrive
                          EBOOK
                                                2020
                                                                            1
                                                                 2
5 Digital
                                                                            4
             OverDrive
                          AUDIOBOOK
                                                2020
                                                                 2
             OverDrive
                          EB00K
                                                2020
6 Digital
```

- # i 6 more variables: Title <chr>, ISBN <chr>, Creator <chr>, Subjects <chr>,
- # Publisher <chr>, PublicationYear <chr>

```
# SQL equivalent (just for comparison)
dbGetQuery(con, "
    SELECT *
    FROM seattle_checkouts
    WHERE CheckoutYear = 2020
    LIMIT 6
")
```

```
UsageClass CheckoutType MaterialType CheckoutYear CheckoutMonth Checkouts
   Physical
                  Horizon
                                   BOOK
                                                2020
1
2
    Digital
                OverDrive
                                  EB00K
                                                2020
                                                                  1
                                                                           12
3
    Digital
                OverDrive
                             AUDIOBOOK
                                                2020
                                                                  5
                                                                            1
```

```
4
     Digital
                OverDrive
                                  EB00K
                                                 2020
                                                                   5
                                                                             1
                                                 2020
                                                                   2
                                                                             4
5
     Digital
                OverDrive
                              AUDIOBOOK
6
     Digital
                OverDrive
                                  EBOOK
                                                 2020
                                                                   2
                                                                             1
                                                                                  Title
1 The dolphin: two versions, 1972-1973 / Robert Lowell; edited by Saskia Hamilton.
                                              Dreaming of You: Gamblers Series, Book 2
3
                                                     The New York Stories (Unabridged)
4
                                                                              Moving On
5
                                                             The Talisman (Unabridged)
6
                                                                         Native Speaker
  ISBN
                           Creator
                                                         Subjects
                                                           Poetry
1
       Lowell, Robert, 1917-1977,
2
                     Lisa Kleypas
                                                 Fiction, Romance
3
                       John O'Hara
                                             Fiction, Literature
4
                       Anna Jacobs
                                             Fiction, Literature
5
                                                  Fiction, Horror
                     Stephen King
6
                     Chang-Rae Lee Fiction, Literature, Thriller
                       Publisher PublicationYear
                                            2019.
1
     Farrar, Straus and Giroux,
2 HarperCollins Publishers Inc.
                                             2005
3
                  Books on Tape
                                             2014
4
    Severn House Publishers Ltd
                                             2012
5 Simon & Schuster - Audiobooks
                                             2014
      Penguin Group (USA), Inc.
                                             2013
```

2. Selecting Columns (SELECT = select())

```
# dplyr approach
seattle_tbl |>
    select(Title, Creator, CheckoutYear) |>
    head() |>
    collect()
```

```
# A tibble: 6 x 3
 Title
                                                             Creator CheckoutYear
  <chr>
                                                              <chr>
                                                                             <dbl>
1 Super rich : a guide to having it all / Russell Simmons ~
                                                             Simmon~
                                                                              2016
2 Shadowheart / James Barclay.
                                                             Barcla~
                                                                              2016
3 Where I'm Reading From: The Changing World of Books
                                                             Tim Pa~
                                                                              2016
4 Little spotted cat / by Alyssa Satin Capucilli ; illustr~ Capuci~
                                                                              2016
5 Dog & butterfly [sound recording] / Heart.
                                                             Heart ~
                                                                              2016
6 Precalculus the easy way / Larry S. Leff.
                                                             Leff, ~
                                                                              2016
```

```
# SQL equivalent
dbGetQuery(con, "
    SELECT Title, Creator, CheckoutYear
    FROM seattle_checkouts
    LIMIT 6
")
```

Title

```
Super rich : a guide to having it all / Russell Simmons with Chris Morrow.
1
2
                                                       Shadowheart / James Barclay.
                               Where I'm Reading From: The Changing World of Books
4 Little spotted cat / by Alyssa Satin Capucilli ; illustrations by Dan Andreason.
                                         Dog & butterfly [sound recording] / Heart.
5
                                          Precalculus the easy way / Larry S. Leff.
6
                         Creator CheckoutYear
                Simmons, Russell
                                          2016
1
2
           Barclay, James, 1965-
                                          2016
                       Tim Parks
                                          2016
4 Capucilli, Alyssa Satin, 1957-
                                          2016
           Heart (Musical group)
                                          2016
               Leff, Lawrence S.
                                          2016
6
```

3. Grouping and Summarizing (GROUP BY = group_by())

```
# dplyr approach (our preferred method)
seattle_tbl |>
  group_by(MaterialType) |>
  summarise(total_checkouts = sum(Checkouts)) |>
  arrange(desc(total_checkouts)) |>
  head() |>
  collect()
```

Warning: Missing values are always removed in SQL aggregation functions. Use `na.rm = TRUE` to silence this warning
This warning is displayed once every 8 hours.

```
3 EBOOK 18918056
4 SOUNDDISC 14579739
5 AUDIOBOOK 9936233
6 VIDEOCASS 1501066
```

```
# SQL equivalent
dbGetQuery(con, "
    SELECT MaterialType, SUM(Checkouts) as total_checkouts
    FROM seattle_checkouts
    GROUP BY MaterialType
    ORDER BY total_checkouts DESC
    LIMIT 6
")
```

```
MaterialType total_checkouts
          BOOK
                      64231952
1
2
    VIDEODISC
                      31389390
3
        EB00K
                      18918056
4
    SOUNDDISC
                      14579739
5
    AUDIOBOOK
                       9936233
6
    VIDEOCASS
                       1501066
```

The Magic: show_query() - See What dplyr Creates

The best part about **dbplyr** is you can see the SQL translation:

```
# Write dplyr code and see the SQL it generates
seattle_tbl |>
  filter(CheckoutYear >= 2020) |>
  group_by(MaterialType) |>
  summarise(
    total_checkouts = sum(Checkouts),
    avg_checkouts = mean(Checkouts)
) |>
  arrange(desc(total_checkouts)) |>
  show_query() # This shows you the SQL!
```

```
<SQL>
SELECT
  MaterialType,
  SUM(Checkouts) AS total_checkouts,
```

```
AVG(Checkouts) AS avg_checkouts
FROM (
    SELECT seattle_checkouts.*
    FROM seattle_checkouts
    WHERE (CheckoutYear >= 2020.0)
) q01
GROUP BY MaterialType
ORDER BY total_checkouts DESC
```

Key Takeaway:

4 VIDEODISC

5 SOUNDDISC

1327399

446323

- Use dplyr for your analysis (it's what this workshop teaches!)
- Use show_query() when you're curious about the SQL
- Use direct SQL only when you need something dplyr can't do easily

Why This Matters for Big Data

Both dplyr and SQL are **pushed down** to the database:

```
6 REGPRINT 51087
7 MIXED 44497
8 MUSIC 9043
9 LARGEPRINT 5267
10 VIDEO 4449
# i more rows
```

```
# Bring it to R memory
final_result <- result |> collect()
```

The Big Idea: Whether you write dplyr or SQL, the database does the heavy lifting, not R!

Strategic mutate() Placement in Database Workflows (5 minutes)

When working with databases like DuckDB, where you place your mutate() operations can dramatically affect performance and functionality.

The Golden Rules for mutate() with Databases

BEFORE collect() (Pushed to Database)

```
# These mutate operations happen IN the database (fast!)
seattle_tbl |>
  mutate(
    # Simple transformations - database can handle these
    checkout_decade = floor(CheckoutYear/10) * 10,
    is_recent = CheckoutYear >= 2020,
    title_length = LENGTH(Title) # SQL function
) |>
  filter(is_recent == TRUE) |> # Can filter on the new column!
collect()
```

A tibble: 6,076,919 x 15

	UsageClass	CheckoutType	MaterialType	CheckoutYear	CheckoutMonth	Checkouts
	<chr></chr>	<chr></chr>	<chr></chr>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>
1	Digital	OverDrive	AUDIOBOOK	2022	9	1
2	Digital	OverDrive	EB00K	2022	9	2
3	Digital	OverDrive	EB00K	2022	9	3
4	Digital	OverDrive	EB00K	2022	9	1
5	Digital	OverDrive	EB00K	2022	9	1

```
6 Digital
             OverDrive
                          AUDIOBOOK
                                                2022
                                                                 9
                                                                           1
7 Physical
                                                                 9
                                                                           2
             Horizon
                         BOOK
                                                2022
8 Digital
             OverDrive
                          AUDIOBOOK
                                                2022
                                                                 9
                                                                           1
9 Physical
                          VIDEODISC
                                                2022
                                                                 9
                                                                           2
             Horizon
10 Digital
                                                                 9
                                                                           2
             OverDrive
                          AUDIOBOOK
                                                2022
# i 6,076,909 more rows
# i 9 more variables: Title <chr>, ISBN <chr>, Creator <chr>, Subjects <chr>,
   Publisher <chr>, PublicationYear <chr>, checkout_decade <dbl>,
   is_recent <lgl>, title_length <dbl>
```

AFTER collect() (In R Memory)

```
# These mutate operations happen in R (slower, but more flexible)
seattle_tbl |>
collect() |> # Brings ALL data to R first!
mutate(
    # Complex R-specific operations
    title_words = str_count(Title, "\\w+"),
    checkout_season = case_when(
        CheckoutMonth %in% c(12,1,2) ~ "Winter",
        CheckoutMonth %in% c(3,4,5) ~ "Spring",
        # ... more complex logic
    )
)
```

```
# SLOW: Bring all data to R, then transform
system.time({
    slow_result <- seattle_tbl |>
        collect() |> # Loads millions of rows into R!
    mutate(checkout_decade = floor(CheckoutYear/10) * 10) |>
    filter(checkout_decade == 2020)
})

# FAST: Transform in database, then collect filtered results
system.time({
    fast_result <- seattle_tbl |>
        mutate(checkout_decade = floor(CheckoutYear/10) * 10) |>
        filter(checkout_decade == 2020) |>
        collect() # Only brings filtered results to R
})
```

When to Use Each Approach

Use mutate() BEFORE collect()	
when:	Use mutate() AFTER collect() when:
Simple math operations	Complex string manipulation with R functions
Date/time extraction	Custom R functions
Basic case_when logic	Advanced statistical calculations
You need to filter on the new column	Complex joins with R objects

Quick Decision Framework

Ask yourself: "Can SQL do this operation?"

- Yes → mutate() before collect()
- $No \rightarrow \text{mutate()} \ \text{after collect()}$
- Not sure \rightarrow Try before first, move after if it fails!

This strategic placement is one of the key skills that separates good big data analysts from great ones!

Superpower 1: Lightning-Fast Aggregations

Let's compare the same analysis using DuckDB vs. what we might do with regular R

Why this is impressive:

- Processed millions of rows in seconds
- Calculated multiple statistics simultaneously
- All done in the database before bringing results to R

Superpower 2: Window Functions Made Easy

Window functions let you do advanced analytics like rankings, running totals, and comparisons within groups:

```
# Find the top 3 most popular titles each year
top_titles_by_year <- seattle_tbl |>
    group_by(CheckoutYear, Title) |>
    summarise(total_checkouts = sum(Checkouts), .groups = "drop") |>
    group_by(CheckoutYear) |>
    window_order(desc(total_checkouts)) |>
```

```
mutate(rank = row_number()) |>
filter(rank <= 3) |>
arrange(CheckoutYear, rank) |>
collect()

# Display results
top_titles_by_year |>
head(15) # Show top 3 for first 5 years
```

```
# A tibble: 15 x 4
# Groups:
          CheckoutYear [5]
  CheckoutYear Title
                                                             total_checkouts rank
          <dbl> <chr>
                                                                       <dbl> <dbl>
           2005 <Unknown Title>
1
                                                                       34189
                                                                                  1
2
           2005 Greatest hits
                                                                        1947
                                                                                  2
3
           2005 Uncataloged Folder or Bag--DWN
                                                                        1905
                                                                                  3
4
           2006 < Unknown Title>
                                                                       52396
                                                                                  1
5
           2006 Greatest hits
                                                                        3268
                                                                                  2
           2006 Flightplan [videorecording] / Touchstone ~
                                                                        2564
6
                                                                                  3
7
           2007 < Unknown Title>
                                                                       47460
                                                                                  1
8
           2007 Greatest hits
                                                                                  2
                                                                        3170
9
           2007 Little Miss Sunshine [videorecording] / B~
                                                                        2335
                                                                                  3
           2008 <Unknown Title>
10
                                                                       45007
                                                                                  1
           2008 Michael Clayton [videorecording] / Warner~
                                                                                  2
                                                                        4957
11
12
           2008 No country for old men [videorecording] /~
                                                                        4693
                                                                                  3
13
           2009 <Unknown Title>
                                                                       41854
                                                                                  1
           2009 Burn after reading [videorecording] / Foc~
14
                                                                        6152
                                                                                  2
15
           2009 Juno [videorecording] / Fox Searchlight P~
                                                                        5501
                                                                                  3
```

Advanced Window Functions:

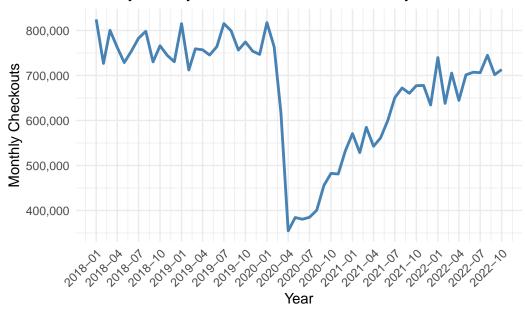
```
# Percentage change from previous month
  pct_change = (monthly_checkouts - prev_month) / prev_month * 100
) |>
collect()
```

Warning: ORDER BY is ignored in subqueries without LIMIT i Do you need to move arrange() later in the pipeline or use window_order() instead?

```
# Visualize the trends
monthly_trends |>
  filter(CheckoutYear >= 2018) |>
  mutate(date = as.Date(paste(CheckoutYear, CheckoutMonth, "01", sep = "-"))) |>
  ggplot(aes(x = date, y = monthly_checkouts)) +
  geom_line(color = "steelblue", size = 1) +
  scale_x_date(date_breaks = "3 months", date_labels = "%Y-%m") +
  scale_y_continuous(labels = scales::comma_format()) +
  theme_minimal() +
  labs(
    title = "Monthly Library Checkouts with Trend Analysis",
    x = "Year",
    y = "Monthly Checkouts"
  ) +
  theme(axis.text.x = element_text(angle = 45, hjust = 1))
```

Warning: Using `size` aesthetic for lines was deprecated in ggplot2 3.4.0. i Please use `linewidth` instead.





Superpower 3: SQL and dplyr Interchangeability

One of DuckDB's greatest strengths is that you can use SQL and dplyr **interchangeably**:

```
# Method 1: Pure dplyr
dplyr_result <- seattle_tbl |>
  filter(CheckoutYear == 2020) |>
  group_by(MaterialType) |>
  summarise(total = sum(Checkouts)) |>
  arrange(desc(total)) |>
  collect()

#inspect
dplyr_result
```

```
# A tibble: 43 x 2

MaterialType total
<chr> <chr> 1 EB00K 2793961
2 AUDIOBOOK 1513625
3 B00K 1241999
4 VIDEODISC 361587
```

```
5 SOUNDDISC
                         116221
 6 MIXED
                           9118
 7 REGPRINT
                           7573
 8 VIDEO
                           2430
9 MUSIC
                           2404
10 SOUNDDISC, VIDEODISC
                           1049
# i 33 more rows
# Method 2: Pure SQL
sql_result <- dbGetQuery(con, "</pre>
  SELECT MaterialType, SUM(Checkouts) as total
 FROM seattle_checkouts
  WHERE CheckoutYear = 2020
  GROUP BY MaterialType
  ORDER BY total DESC
```

MaterialType total EBOOK 2793961 1 2 AUDIOBOOK 1513625 BOOK 1241999 3 4 VIDEODISC 361587 5 SOUNDDISC 116221 6 MIXED 9118 7 REGPRINT 7573 8 VIDEO 2430 9 MUSIC 2404 10 SOUNDDISC, VIDEODISC 1049 789 11 CR 12 LARGEPRINT 697 13 624 ER 499 14 SOUNDREC 15 ER, VIDEODISC 244 16 202 MAP 17 ER, SOUNDDISC 197 18 ATLAS 148 19 VISUAL 111 20 UNSPECIFIED 62 REGPRINT, SOUNDDISC 21 30

")

#inspect
sql_result

```
22
                                       VIDEOREC
                                                      19
23
                                      VIDEOCASS
                                                      17
24
                                                      17
                                    MUSICSNDREC
25
                              ER, NONPROJGRAPH
                                                      14
26
                                                      12
                                      VIDEOCART
                            REGPRINT, VIDEOREC
27
                                                      10
28
                                                       9
                                      SOUNDCASS
                                                       9
29
30
                                   NOTATEDMUSIC
                                                       8
31
                           SOUNDDISC, SOUNDREC
                                                       7
                          FLASHCARD, SOUNDDISC
32
                                                       6
33
                                      MICROFORM
                                                       5
                                                       3
34
                                      ER, PRINT
                                                       2
35
                          SOUNDDISC, VIDEOCASS
36
                          SOUNDCASS, SOUNDDISC
                                                       2
37
                                        PICTURE
                                                       1
38 SOUNDCASS, SOUNDDISC, VIDEOCASS, VIDEODISC
                                                       1
39
                                      FLASHCARD
                                                       1
40
               SOUNDCASS, SOUNDDISC, SOUNDREC
                                                       1
                                   ER, VIDEOREC
41
                                                       1
42
                                          PHOTO
                                                       1
43
                                          GLOBE
                                                       1
```

```
# Method 3: Mixed approach - see the SQL that dplyr generates
seattle_tbl |>
  filter(CheckoutYear == 2020) |>
  group_by(MaterialType) |>
  summarise(total = sum(Checkouts)) |>
  show_query()
```

```
<SQL>
SELECT MaterialType, SUM(Checkouts) AS total
FROM (
   SELECT seattle_checkouts.*
   FROM seattle_checkouts
   WHERE (CheckoutYear = 2020.0)
) q01
GROUP BY MaterialType
```

Real-World Analytics Pipeline (25 minutes)

Exercise 1: Multi-Table Analysis (10 minutes)

Research Question: "How have different categories of library materials (Books, Digital, Video, Audio) performed over time? Are digital formats really growing faster than physical ones?"

This is a perfect question for demonstrating **joins** - one of DuckDB's superpowers! We want to:

- Create a lookup table to categorize our materials
- Join our main data with this categorization
- Analyze trends across categories and formats
- Compare digital vs. physical growth patterns

Step 1: Create a Material Categories Lookup Table

```
# Create a material categories lookup table using dplyr
material_categories <- seattle_tbl |>
  select(MaterialType) |>
  distinct() |>
  mutate(
    category = case when(
      MaterialType %in% c('EBOOK', 'AUDIOBOOK') ~ 'Digital',
      MaterialType %in% c('BOOK', 'LARGEPRINT', 'REGPRINT') ~ 'Books',
      str_detect(MaterialType, 'VIDEO|DVD') ~ 'Video',
      str_detect(MaterialType, 'SOUND|CD') ~ 'Audio',
      TRUE ~ 'Other'
    ),
    format_type = case_when(
      MaterialType %in% c('EBOOK', 'AUDIOBOOK') ~ 'Digital',
      TRUE ~ 'Physical'
    )
  ) |>
  compute(name = "material_categories")
# Create our reference to the new table (it's already created above)
material cat <- material categories
# Look at our categories
```

```
collect()
# A tibble: 71 x 3
   MaterialType
                                   category format_type
   <chr>
                                   <chr>
                                             <chr>>
 1 MOVIE
                                   Other
                                             Physical
 2 ATLAS
                                   Other
                                            Physical
 3 ER
                                   Other
                                            Physical
 4 VISUAL
                                   Other
                                            Physical
 5 COMPFILE
                                            Physical
                                   Other
 6 SOUNDCASS, SOUNDDISC, SOUNDREC Audio
                                            Physical
 7 VIDEODISC
                                   Video
                                             Physical
 8 BOOK
                                   Books
                                             Physical
 9 SONG
                                   Other
                                             Physical
10 COMIC
                                   Other
                                             Physical
# i 61 more rows
# Create our reference to the new table (it's already created above)
material_cat <- material_categories</pre>
# Look at our categories
material_cat |>
  collect()
# A tibble: 71 \times 3
   MaterialType
                                   category format_type
```

```
<chr>
                                  <chr>
                                           <chr>
1 MOVIE
                                  Other
                                           Physical
2 ATLAS
                                  Other
                                           Physical
3 ER
                                  Other
                                           Physical
4 VISUAL
                                           Physical
                                  Other
5 COMPFILE
                                  Other
                                           Physical
6 SOUNDCASS, SOUNDDISC, SOUNDREC Audio
                                           Physical
7 VIDEODISC
                                  Video
                                            Physical
8 BOOK
                                            Physical
                                  Books
9 SONG
                                            Physical
                                  Other
10 COMIC
                                  Other
                                            Physical
# i 61 more rows
```

material_cat |>

Step 2: Try a Complex Join (Let's See What Happens!)

Now let's join our main data with our lookup table:

```
# Complex analysis combining our main data with categories
category_analysis <- seattle_tbl |>
  left_join(material_cat, by = "MaterialType") |>
  filter(CheckoutYear >= 2018) |>
  group_by(CheckoutYear, category, format_type) |>
  summarise(
   total_checkouts = sum(Checkouts),
   unique_titles = n_distinct(Title),
   avg_checkouts_per_title = total_checkouts / unique_titles,
    .groups = "drop"
  ) |>
  collect()
#Inspect
category_analysis
# Visualize the category trends
category_analysis |>
  ggplot(aes(x = CheckoutYear, y = total_checkouts,
             color = category, linetype = format_type)) +
  geom_line(size = 1.2) +
  geom_point(size = 2) +
  theme_minimal() +
  labs(
   title = "Library Checkouts by Category and Format",
    x = "Year",
   y = "Total Checkouts",
    color = "Category",
    linetype = "Format"
  ) +
  scale_y_continuous(labels = scales::comma)
```

OHHHH NOOO!!!! You got an error. DO you know why? Read on young pawan!

Why This Happens:

- dbplyr translates your code to SQL
- SQL doesn't allow you to reference a column you're creating in the same SELECT statement

• The error message is actually quite helpful - it tells you exactly what to do!

The Fix: You need to split this into two steps or use a different approach because SQL can't reference MaterialType after you've already transformed it in the same query. You either need to:

- 1. Use the original column name throughout
- 2. Split into multiple steps
- 3. Use a subquery approach with compute() between steps

The SQL engine gets confused when you try to reference a column that's being created in the same statement - it's like trying to use a variable before you've finished declaring it!

Step 3: Fix the Code (Your Turn!)

Update the code above so it will run. **Hint:** Move the calculation to a separate mutate() step.

```
# Complex analysis combining our main data with categories
category_analysis <- seattle_tbl |>
  left_join(material_cat, by = "MaterialType") |>
  filter(CheckoutYear >= 2018) |>
  group_by(CheckoutYear, category, format_type) |>
  summarise(
   total_checkouts = sum(Checkouts),
   unique_titles = n_distinct(Title),
   .groups = "drop"
) |>
  # Add the calculated column in a separate mutate step
  mutate(avg_checkouts_per_title = total_checkouts / unique_titles) |>
  collect()
```

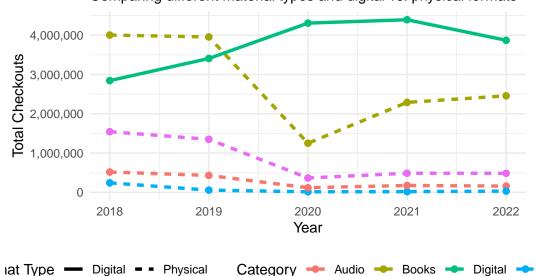
The key differences are:

- 1. In the summarise() function:
- **REMOVED:** `avg_checkouts_per_title = total_checkouts / unique_titles,` This li
 - 2. ADDED a separate mutate() step:
- `mutate(avg_checkouts_per_title = total_checkouts / unique_titles) |> - This calcu

Step 4: Visualize the Results

```
# Visualize the category trends
category_analysis |>
  ggplot(aes(x = CheckoutYear, y = total_checkouts,
             color = category, linetype = format_type)) +
  geom_line(size = 1.2) +
  geom_point(size = 2) +
  theme_minimal() +
  labs(
    title = "Library Checkouts by Category and Format (2018-2023)",
    subtitle = "Comparing different material types and digital vs. physical formats",
   x = "Year",
   y = "Total Checkouts",
    color = "Category",
   linetype = "Format Type"
  scale_y_continuous(labels = scales::comma) +
  theme(legend.position = "bottom")
```

Library Checkouts by Category and Format (2018–2023) Comparing different material types and digital vs. physical formats



Step 5: Answer Our Research Question

Turn and Talk (3 minutes):

- What trends do you see in digital vs. physical checkouts?
- Which categories seem most affected by recent changes?
- How might the library use this information for collection development?

Key Learning Points:

- LEFT JOIN kept all our checkout records and added category information
- Two-step calculations avoid SQL reference errors
- Complex analysis becomes manageable when broken into clear steps
- Real insights emerge from combining multiple data perspectives

What is a JOIN? (Think of it like dating apps!)

Imagine you have two lists:

- List A: People's names and their favorite books
- List B: Book titles and their authors

A **JOIN** is like playing matchmaker - you connect the two lists based on something they have in common (the book title)!

Exercise 2: Understanding Joins with our data and duckdb (10 minutes)

Research Question: "Do books with complete author information get checked out more often than books with missing author details? And how does this vary by publication year?"

This is a great question for learning joins! We want to:

- Compare checkout patterns for books with vs. without author information
- Look at how this changes over different publication years
- Combine information from multiple "tables" (views of our data)

Step 1: Create Our "Tables" (Different Views of the Data)

```
# Create books_info with cleaned data
books_info <- seattle_tbl |>
  select(Title, Creator, PublicationYear, MaterialType) |>
  filter(MaterialType == "BOOK") |>
  distinct() |>
  mutate(
   has_author = case_when(
     is.na(Creator) | Creator == "" ~ "Missing Author",
     TRUE ~ "Has Author"
    clean_year = as.numeric(sql("regexp_extract(PublicationYear, '\\d{4}')")),
    decade = case_when(
      clean_year >= 2010 ~ "2010s+",
      clean_year >= 2000 ~ "2000s",
      clean_year >= 1990 ~ "1990s",
     TRUE ~ "Pre-1990s"
    )
  )
# Create checkout_stats
checkout_stats <- seattle_tbl |>
  filter(MaterialType == "BOOK") |>
  group_by(Title) |>
  summarise(
   total checkouts = sum(Checkouts),
   checkout_sessions = n(),
    .groups = "drop"
  ) |>
  mutate(avg_per_session = total_checkouts / checkout_sessions)
# Quick check both work
books_info |>
 head() |>
 collect()
# A tibble: 6 x 7
  Title
```

```
Creator PublicationYear MaterialType has_author clean_year decade
               <chr>
                       <chr>
                                        <chr>>
                                                     <chr>
                                                                     <dbl> <chr>
1 La tortuga ~ "Aliag~ 2008.
                                       BOOK
                                                     Has Author
                                                                      2008 2000s
2 The Realist~ ""
                       2016.
                                       BOOK
                                                     Missing A~
                                                                      2016 2010s+
3 Smooth talk~ "Kleyp~ 2009.
                                       BOOK
                                                     Has Author
                                                                      2009 2000s
4 Playing Jul~ "Wetze~ [2015]
                                       BOOK
                                                     Has Author
                                                                      2015 2010s+
```

```
5 Light, colo~ "Birre~ [1969] BOOK Has Author 1969 Pre-1~ 6 Seconds to ~ "Donla~ [2017] BOOK Has Author 2017 2010s+
```

```
checkout_stats |>
  head() |>
  collect()
```

```
# A tibble: 6 x 4
  Title
                               total_checkouts checkout_sessions avg_per_session
  <chr>
                                         <dbl>
                                                            <dbl>
                                                                            <dbl>
1 Dakota born / Debbie Macomb~
                                           141
                                                               84
                                                                             1.68
2 Batman : the long Halloween~
                                           571
                                                              124
                                                                            4.60
3 Cravings / Chrissy Teigen ;~
                                          1138
                                                               75
                                                                            15.2
4 Rude cakes / cooked up by R~
                                           869
                                                               83
                                                                            10.5
5 The man who folded himself ~
                                           133
                                                               72
                                                                            1.85
6 Honda Civic & CR-V automoti~
                                            33
                                                               32
                                                                             1.03
```

Step 2: JOIN the Tables Together!

```
# Step 1: Create two simple "tables" - no complex cleaning needed!
books_summary <- seattle_tbl |>
  filter(MaterialType == "BOOK") |>
  group_by(Title) |>
  summarise(book_checkouts = sum(Checkouts), .groups = "drop")
digital_summary <- seattle_tbl |>
  filter(MaterialType %in% c("EBOOK", "AUDIOBOOK")) |>
  group_by(Title) |>
  summarise(digital_checkouts = sum(Checkouts), .groups = "drop")
# Step 2: Do different types of joins
# INNER JOIN - titles that exist in BOTH formats
both_formats <- books_summary |>
  inner_join(digital_summary, by = "Title") |>
  collect()
# LEFT JOIN - all books, with digital info if it exists
books_with_digital <- books_summary |>
  left_join(digital_summary, by = "Title") |>
  collect()
```

```
# Check results
glue("Books only: {nrow(books_summary |> collect())}")

Books only: 790313

glue("Digital only: {nrow(digital_summary |> collect())}")

Digital only: 317474

glue("Titles in BOTH formats: {nrow(both_formats)}")

Titles in BOTH formats: 3052

glue("Books with optional digital: {nrow(books_with_digital)}")
```

Books with optional digital: 790313

Choose Your DuckDB Adventure (15 minutes)

Work in pairs to tackle one of these real-world analytical challenges:

Beginner Challenge: Popular Authors Analysis

Goal: Analyze the trend from physical to digital library materials over time.

Your mission:

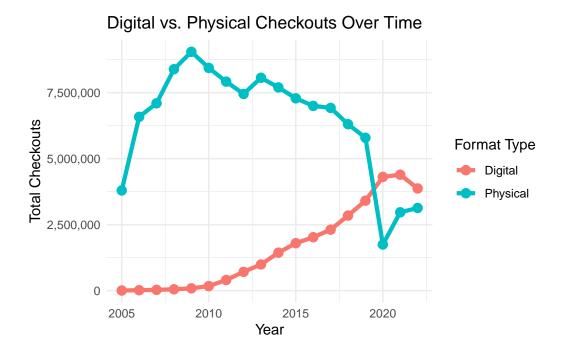
- 1. Create a list of digital material types
- 2. Use case_when() to classify materials as "Digital" or "Physical"
- 3. Group by Checkout Year and format type
- 4. Calculate total checkouts per year for each format
- 5. Create two visualizations: trend lines and percentage breakdown

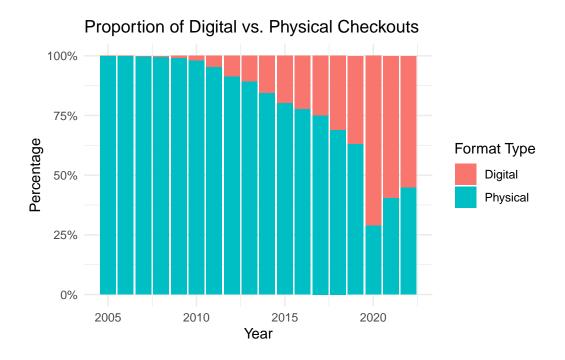
Helpful hints for beginners:

- Use %in% to check if MaterialType is in your digital materials list
- Use case_when() with TRUE ~ "Physical" as the default case

- Remember to use .groups = "drop" in your summarise
- Don't forget to collect() before creating visualizations!
- Use geom_line() for trends and geom_col() for percentages

```
# Classify materials as digital or physical
digital_materials <- c("EBOOK", "AUDIOBOOK", "DOWNLOAD", "ELECTRONIC RESOURCE")</pre>
material_trends <- seattle_tbl |>
  mutate(
    format_type = case_when(
      MaterialType %in% digital_materials ~ "Digital",
      TRUE ~ "Physical"
    )
  ) |>
  group_by(CheckoutYear, format_type) |>
  summarise(total_checkouts = sum(Checkouts, na.rm = TRUE), .groups = "drop") |>
  collect()
# Visualize the trends
ggplot(material_trends, aes(x = CheckoutYear, y = total_checkouts,
                           color = format_type, group = format_type)) +
  geom_line(linewidth = 1.5) +
  geom_point(size = 3) +
  theme minimal() +
  labs(title = "Digital vs. Physical Checkouts Over Time",
       x = "Year", y = "Total Checkouts", color = "Format Type") +
  scale_y_continuous(labels = scales::comma)
```





Intermediate Challenge: Popular Authors Analysis

Goal: Find the most popular authors by checkout volume and diversity.

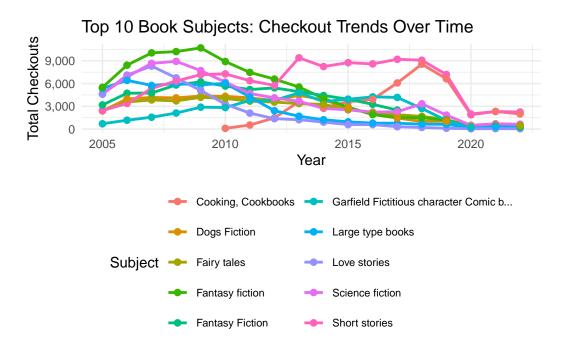
Your mission:

- 1. Filter to books only and remove missing author information
- 2. Group by Creator (author)
- 3. Calculate total checkouts, unique titles, and average checkouts per title
- 4. Filter to authors with at least 5 different titles
- 5. Rank by total checkouts and create a horizontal bar chart

Helpful hints for intermediate:

- Use filter(!is.na(Creator) & Creator != "") to remove missing authors
- Remember the mutate-after-summarise pattern for calculated columns
- Use n_distinct(Title) to count unique titles per author
- Use coord_flip() to make horizontal bars
- Use reorder(Creator, total_checkouts) to sort bars by value

```
# Step 1: Filter to books only
books_only <- seattle_tbl |>
 filter(MaterialType == "BOOK")
# Step 2: Group by Subjects column and CheckoutYear
# Step 3: Calculate total checkouts per subject per year
subject_analysis <- books_only |>
 filter(!is.na(Subjects) & Subjects != "") |> # Remove missing subjects
 group_by(Subjects, CheckoutYear) |>
 summarise(total_checkouts = sum(Checkouts), .groups = "drop") |>
 collect()
# Step 4: Find the top 10 subjects by total checkouts
top_subjects <- subject_analysis |>
 group_by(Subjects) |>
 summarise(total_all_years = sum(total_checkouts)) |>
 arrange(desc(total_all_years)) |>
 head(10) |>
 pull(Subjects)
# Filter to just the top 10 subjects for cleaner visualization
top_subject_trends <- subject_analysis |>
 filter(Subjects %in% top_subjects) |>
 mutate(Subjects = str_trunc(Subjects, 40)) # Shorten long subject names
# Step 5: Create a visualization showing trends over time
top_subject_trends |>
 ggplot(aes(x = CheckoutYear, y = total_checkouts, color = Subjects)) +
 geom_line(linewidth = 1) +
 geom_point(size = 2) +
 theme_minimal() +
 labs(
   title = "Top 10 Book Subjects: Checkout Trends Over Time",
   x = "Year",
   y = "Total Checkouts",
   color = "Subject"
  ) +
  scale y continuous(labels = scales::comma) +
  theme(legend.position = "bottom", legend.text = element_text(size = 8)) +
  guides(color = guide_legend(ncol = 2))
```



```
# Bonus: Summary table of top subjects
top_subjects_summary <- subject_analysis |>
  filter(Subjects %in% top_subjects) |>
  group_by(Subjects) |>
  summarise(
    total_checkouts = sum(total_checkouts),
    years_active = n_distinct(CheckoutYear),
    avg_yearly = round(mean(total_checkouts)),
    peak_year = CheckoutYear[which.max(total_checkouts)],
    peak_checkouts = max(total_checkouts)
) |>
  arrange(desc(total_checkouts))
```

A tibble: 10 x 6

	Subjects	total_checkouts	years_active	avg_yearly	<pre>peak_year</pre>	<pre>peak_checkouts</pre>
	<chr></chr>	<dbl></dbl>	<int></int>	<dbl></dbl>	<dbl></dbl>	<dbl></dbl>
1	Short stori~	111096	18	111096	2021	111096
2	? Fantasy fic~	87516	18	87516	2017	87516
3	Science fic~	72277	18	72277	2015	72277
4	Fantasy Fic~	60078	13	60078	2008	60078

5 Large type ~	49486	18	49486	2015	49486
6 Dogs Fiction	48917	18	48917	2007	48917
7 Fairy tales	46545	18	46545	2008	46545
8 Garfield Fi~	44044	18	44044	2017	44044
9 Cooking, Co~	43511	13	43511	2017	43511
10 Love stories	42690	18	42690	2010	42690

Cleanup: Closing Your Database Connection

Always remember to close your database connections when you're done:

```
# Close the DuckDB connection
dbDisconnect(con, shutdown = TRUE)
# Verify it's closed
glue(" DuckDB connection closed successfully")
 Connection Best Practices:
# Method 1: Explicit cleanup (recommended for scripts)
con <- dbConnect(duckdb(), "data/seattle.duckdb")</pre>
# ... do your analysis ...
dbDisconnect(con, shutdown = TRUE)
# Method 2:
Automatic cleanup with on.exit() (good for functions)
analyze_library_data <- function()</pre>
  {con <- dbConnect(duckdb(), "data/seattle.duckdb")</pre>
  on.exit(dbDisconnect(con, shutdown = TRUE)) # Always runs, even if error
# Your analysis code here
result <- tbl(con, "seattle_checkouts") |>
  summarise(total = sum(Checkouts)) |>
    collect()
return(result)
# Connection closes automatically when function exits }
```

Method 3: Check for existing connections

if (exists("con") && !is.null(con)) {dbDisconnect(con, shutdown = TRUE)}

Why close connections?

- Free memory: Releases database resources
- Prevent errors: Avoids "connection already exists" issues
- Good practice: Professional database hygiene
- File locks: Allows other processes to access the database file

The shutdown = TRUE parameter:

- Completely shuts down the DuckDB instance
- Required for persistent databases (those saved to files)
- Ensures the database file is properly closed

Key Takeaways from Module 3

What You've Accomplished Today

Congratulations! You've just:

- Connected R to a high-performance analytical database
- Executed complex joins and aggregations on millions of rows

Used window functions for advanced time-series analysis

- Leveraged both SQL and dplyr syntax interchangeably
- Built persistent databases for reproducible analytics
- Optimized queries for maximum performance

Essential DuckDB Patterns to Remember

1. The Connection Pattern:

```
con <- dbConnect(duckdb(), "database.duckdb") # Create persistent DB seattle_tbl <- tbl(con</pre>
  2. The SQL-dplyr Bridge Pattern:
# See what dplyr generates
query |>
 show_query()
# Use SQL directly when needed
  dbGetQuery(con, "SELECT ...")
# Mix both approaches
 tbl(con, "table") |>
   filter(...) |>
   show_query()
  3. The Window Function Pattern:
data |>
 group_by(category) |>
 window_order(date) |>
 mutate(rank = row_number(),
        cumulative = cumsum(value),
        pct_change = (value - lag(value)) / lag(value))
```

When to Choose Each Tool

Task	Arrow	DuckDB
Reading large files	Best	Good
Simple filtering	Fast	Fast
Complex joins	Limited	Excellent

Task	Arrow	DuckDB
Window functions	No	Excellent
SQL queries	No	Native
Persistent storage	No	Yes
Memory efficiency	Excellent	Good

Coming Up: Advanced Applications

Now you have the complete toolkit:

• dplyr: Intuitive data manipulation grammar

• Arrow: Efficient large file processing

• DuckDB: Database-powered analytics

In real projects, you'll often use all three:

1. **Arrow** to efficiently read your data

2. DuckDB for complex analytics and joins

3. **dplyr** as your consistent interface to both

Quick Self-Assessment

I feel confident that I can:

- Connect R to DuckDB databases
- Choose between Arrow and DuckDB for different tasks
- Use window functions for advanced analytics
- Build reproducible analytical pipelines

I'd like more practice with:

- SQL queries
- Window function syntax
- Performance optimization
- Multi-table joins
- Mixed SQL/dplyr workflows

Ready to apply these tools to your own data? You now have professional-grade capabilities for analyzing datasets of any size!

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