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**New Perspectives** Access 2013

Tutorial 1: SAM Project 1a

PHYSICAL THERAPY SPECIALISTS, P.C.

CREATING A TABLE, QUERY, FORM, AND REPORT TO MANAGE THERAPIST DATA

# PROJECT DESCRIPTION

# Jennifer Christie, a licensed physical therapist, opened the Physical Therapy Specialists clinic in 2009. Over time, Jennifer has expanded her business to include a staff of therapists with different specialties to treat patients who are referred to her clinic for physical therapy from a nearby medical center. The recent expansion of Jennifer’s business to include a second location and several new employees has necessitated a change in how she manages the clinic’s operations. She has selected Access 2013 to manage her business data. You’ll help Jennifer create and maintain an Access database to store data about therapists, patients, and billing.

# GETTING STARTED

* Download the following file from the SAM website:
  + **NP\_Access2013\_T1\_P1a*\_FirstLastName\_*1.accdb**
* Open the file you just downloaded and save it with the name:
  + **NP\_Access2013\_T1\_P1a\_*FirstLastName*\_2.accdb**
  + *Hint:* If you do not see the **.accdb** file extension in the Save file dialog box, do not type it. Access will add the file extension for you automatically.
* To complete this Project, you will also need to download and save the following support file from the SAM website:
  + **support\_NP\_A13\_T1\_P1a\_staff.accdb**
* Open the **\_GradingInfoTable**table and ensure that your first and last name is displayed as the first record in the table. If the table does not contain your name, delete the file and download a new copy from the SAM website.

# PROJECT STEPS

1. Create a new table in Datasheet view. Save the table as **Patient**.
2. Change the name of the ID field in the *Patient* table to **PatientID**.
3. Change the data type of the PatientID field to **Short Text**.
4. Create the following fields in the Patient table, using the Short Text data type: **FirstName**, **LastName**, **Address**, **City**, **State**, and **Zip**.
5. Enter the records shown in Table 1 below in the *Patient* table.

# Table 1: Patient Table

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|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| PatientID | FirstName | LastName | Address | City | State | Zip |
| A10026 | Al | Pandola | 45 South Main St | Akron | OH | 44307 |
| B19356 | Linda | Francis | 235 Hwy 5 | Akron | OH | 44308 |

1. Resize the Address field to best fit the data it contains. Save and close the *Patient* table.
2. Open the *Therapist* table in Datasheet view, and then change the name of the ID field to **TherapistID**.
3. Change the data type of the TherapistID field to **Short Text**.
4. Change the data type of the HireDate field to **Date/Time**, and then save the table.
5. Enter the records shown in Table 2 into the *Therapist* table.

# Table 2: Therapist Table

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|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| TherapistID | FirstName | LastName | Specialty | Certification | HireDate |
| 501 | Jacob | Steinley | Post-surgical rehab | DPT | 5/2/2016 |
| 508 | Belinda | Roberts | Running-related | DPT | 1/5/2015 |

1. Jennifer created a database named *support\_NP\_A13\_T1\_P1a\_staff* that contains a table with additional therapist data. The *Therapist* table you just edited has the same design as the *Employee* table in the *support\_NP\_A13\_T1\_P1a\_staff* database. Copy all the records from the *Employee* table in the *support\_NP\_A13\_T1\_P1a\_staff* database and paste them at the end of the *Therapist* table in the current database. (The file **support\_NP\_A13\_T1\_P1a\_staff.accdb** is available from the SAM Web site.)
2. Resize the Specialty column in the *Therapist* datasheet to best fit the data it contains. Save the table, and then close it.
3. Use the Simple Query Wizard to create a query based on the *Therapist* table. Include the **FirstName**, **LastName**, and **Specialty** fields from the *Therapist* table in the query, in that order. Name the query **Specialties**, and then close the query.
4. Use the Form tool to create a form based on the *Therapist* table. Save the form as **TherapistInfo**.
5. In Form view, use the navigation buttons for the *TherapistInfo* form to navigate to the third record (for TherapistID 409), and then change the Certification field value to **DPT**.
6. Navigate to the last record (for TherapistID 702) in the *TherapistInfo* form, and then change the Specialty field value to **Running-related**. Navigate back to the first record in the *Therapist* table, and then close the form.
7. Use the Report tool to create a report based on the *Therapist* table. Save the report as **TherapistList**.
8. In Layout view for the *TherapistList* report, use the mouse to reduce the width of the TherapistID column so it is approximately as wide as the text “TherapistID” in the column heading.
9. Select the text box that appears below the TherapistID column (and contains the number 11) in the *TherapistList* report. Then use the mouse to resize the height of the text box slightly (by approximately 1/16-inch) so that it is tall enough to completely display the value it contains, as shown in Figure 1 on the next page. Save the report.

# Figure 1: Therapist Report

report heading tile Therapist report date Thursday, February 11, 2016
next line 3:45:58 PM
report body first line TherapistID FirstName LastName Specialty
first record 501 Jacob Steinley Post-surgical rehab
next line 508 Belinda Roberts Running-related
next line 122 Richard Martinez Spinal disorders
next line 302 Shelley Lachare Low-back pain
next line 409 David Reese Spinal deformities
next line 542 Laura McHarg Headaches
next line 605 Missy Schmidt Low-back pain
next line 699 Michael Lazari Sports injuries
next line 700 Fred Zachry Sports injuries
next line 701 Jennifer Christie Strength and conditioning
next line 702 James Gratin Running-related
next line 11

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1. Close the Navigation pane. Select the text box that appears below the Specialty and Certification columns and that contains the text “Page 1 of 1.” Use an arrow key to move the text box to the left so that its left edge vertically aligns with the left edge of the Specialty column above it. View the first page of the report in Print Preview to view the changes you made, and then view the next page of the report in Print Preview. Save and close the report, and then open the Navigation pane.

Close and save any open database objects. Compact and repair your database, then exit Access. Follow the directions on the SAM website to submit your completed project.