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**New Perspectives** Access 2013

Tutorial 2: SAM Project 1a

PHYSICAL THERAPY SPECIALISTS, P.C.

UPDATING TABLES, ADDING RECORDS, AND CREATING RELATionships

# PROJECT DESCRIPTION

# Jennifer Christie uses a database to store and maintain data about the therapists, patients, billing, and locations for Physical Therapy Specialists. She asks you to help her continue building the database by changing the properties for fields in three tables, creating a fourth table, adding records, and creating the table relationships.

# GETTING STARTED

* Download the following file from the SAM website:
  + **NP\_Access2013\_T2\_P1a*\_FirstLastName\_*1.accdb**
* Open the file you just downloaded and save it with the name:
  + **NP\_Access2013\_T2\_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 files from the SAM website:
  + **support\_NP\_A13\_T2\_P1a\_pts.accdb**
  + **support\_NP\_A13\_T2\_P1a\_patient.txt**
  + **support\_NP\_A13\_T2\_P1a\_billing.xlsx**
* 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. Open the *Therapist* table in Design view, and then set the field properties shown in Table 1 on the following page. The **TherapistID** field should be set as the **primary key** for the table.

# Table 1: Therapist Table – Field Properties

# 

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Field Name | Data Type | Description | Field Size | Other |
| TherapistID | Short Text | Primary key | 3 | Caption: Therapist ID |
| LastName | Short Text |  | 25 | Caption: Last Name |
| FirstName | Short Text |  | 20 | Caption: First Name |
| Specialty | Short Text |  | 25 |  |
| Certification | Short Text |  | 20 |  |
| College | Short Text |  | 255 |  |
| HireDate | Date/Time |  |  | Format: Short Date  Caption: Hire Date |

1. Add a new field to the table, so it appears after the HireDate field. Use the field name **Minors**, the **Yes/No** data type, the **Yes/No** Format property, the default value **No**, and the Caption **Accepts Minors**.
2. Delete the College field from the table. Save the *Therapist* table. (Click the Yes button when asked about potential data loss.)
3. In Datasheet view for the *Therapist* table, indicate that the following therapists will accept patients who are minors: **Reese**, **McHarg**, and **Zachry**.
4. Resize the Accepts Minors column in the *Therapist* datasheet to best fit the data it contains. Save and close the *Therapist* table.
5. Import the structure of the *Patient* table in the *support\_NP\_A13\_T2\_P1a\_pts.accdb* database, available for download from the SAM website, into the current database. Do not save the import steps.
6. Open the *Patient* table in Design view, and then update the field properties in using the information in Table 2 on the following page. The **PatientID** field should be set as the **primary key** for the table. When you have finished, save the *Patient* table.

# Table 2: Patient Table – Field Properties

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Field Name | Data Type | Description | Field Size | Other |
| PatientID | Short Text | Primary key | 6 | Caption: Patient ID |
| FirstName | Short Text |  | 20 | Caption: First Name |
| LastName | Short Text |  | 25 | Caption: Last Name |
| Address | Short Text |  | 35 |  |
| City | Short Text |  | 25 |  |
| State | Short Text |  | 2 | Default Value: OH |
| Zip | Short Text |  | 10 |  |
| Phone | Short Text |  | 15 |  |
| BirthDate | Date/Time |  |  | Format: Short Date  Caption: Birth Date |
| Gender | Short Text | F (Female), M (Male) | 1 |  |

1. Add the records shown in Table 3 below to the *Patient* table. Close the table when you are finished.

# Table 3: Patient Table - Records

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Patient ID | FirstName | LastName | Address | City | State | Zip | Phone | Birth Date | Gender |
| A10026 | Al | Pandola | 45 South Main St | Akron | OH | 44307 | 330-555-4815 | 12/15/1961 | M  © 2014 Cengage Learning. |
| B10585 | Maria | Green | 12 Malabar | Akron | OH | 44306 | 330-555-9855 | 2/28/1965 | F |

1. Jennifer exported her existing patient data to a text file and asks you to add this data to the *Patient* table. Import the data as follows:
   1. Specify *support\_NP\_A13\_T2\_P1a\_patient.txt* as the source of the data. (The file **support\_NP\_A13\_T2\_P1a\_patient.txt** is available for download from the SAM website.)
   2. Select the option to append a copy of the records to the *Patient* table.
   3. In the Import Text Wizard dialog boxes, choose the option to import delimited data, to use a comma delimiter, and to import the data into the *Patient* table. Do not save the import steps.
2. Open the *Billing* table in Design view, and then set the field properties shown in Table 4 below. The **BillingID** field should be set as the **primary key** for the table.

# Table 4: Billing Table – Field Properties

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Field Name | Data Type | Description | Field Size | Other |
| BillingID | Short Text | Primary key | 6 | Caption: Billing ID |
| PatientID | Short Text | Foreign key | 6 | Caption: Patient ID |
| TherapistID | Short Text | Foreign key | 3 | Caption: Therapist ID |
| StartDate | Date/Time |  |  | Format: Short Date  Caption: Start Date |
| EndDate | Date/Time |  |  | Format: Short Date  Caption: End Date |
| Amount | Currency | Total contract amount |  | Decimal Places: 0 |
| Sessions | Number | Number of sessions | Integer |  |

1. In Design view for the *Billing* table, move the Sessions field so it follows the EndDate field. Save and close the table.
2. Use the Import Spreadsheet Wizard to add data to the *Billing* table from an Excel spreadsheet as follows:
   1. Specify *support\_NP\_A13\_T2\_P1a\_billing.xlsx* as the source of the data. (The file **support\_NP\_A13\_T2\_P1a\_billing.xlsx** is available for download from the SAM website.)
   2. Select the option to append a copy of the records to the *Billing* table.
   3. In the Import Spreadsheet Wizard dialog boxes, choose the *Sheet1* worksheet, and import to the *Billing* table. Do not save the import steps.
3. In Design view, create a new table using the information shown below in Table 5. The **LocationID** field should be set as the **primary key** for the table. Save the table as *Location*, and then close the table.

# Table 5: Location Table – Field Properties

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Field Name | Data Type | Description | Field Size | Other |
| LocationID | Short Text | Primary key | 3 | Caption: Location ID |
| Address | Short Text |  | 35 |  |
| City | Short Text |  | 25 |  |
| State | Short Text |  | 2 |  |
| Zip | Short Text |  | 10 |  |
| Phone | Short Text |  | 15 |  |

1. Add the *Therapist*, *Billing*, and *Patient* tables to the Relationships window. Resize the field list for each table shown in the Relationships window so all fields are visible in the field list. Define a one-to-many relationship between the primary *Therapist* table and the related *Billing* table using the TherapistID field. Choose the options to enforce referential integrity and to cascade updates to related fields.
2. Define a one-to-many relationship between the primary *Patient* table and the related *Billing* table using the PatientID field. Choose the options to enforce referential integrity and to cascade updates to related fields. Figure 1 on the following page shows the completed Relationships window. Save and close the Relationships window.

# Figure 1: Relationships Window

Microsoft product screenshots used with permission from Microsoft Corporation.

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tables left to right Therapist table Billing table Patient table
first relationship Therapist table one side Billing table many side on TherapistID field
next relationship Billing table many side Patient table one side on PatientID field

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