samlogo_blue_pc.tif

**New Perspectives** Access 2013

Tutorial 4: SAM Project 1a

PHYSICAL THERAPY SPECIALISTS, P.C.

Using Queries and Reports to View Datact Name

Project Goal

# PROJECT DESCRIPTION

# Jennifer Christie wants to streamline the data-entry process at Physical Therapy Specialists by creating forms that her staff can use to update and view data about employees and patient billing. She also wants to create a report to display patient billing data. You’ll create two forms and a report to help Jennifer with her request.

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# GETTING STARTED

* Download the following file from the SAM website:
  + **NP\_Access2013\_T4\_P1a\_FirstLastName\_1.accdb**
* Open the file you just downloaded and save it with the name:
  + **NP\_Access2013\_T4\_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\_T4\_P1a\_pst.jpg**
* 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. Use the Form tool to create a form based on the *Employee* table, and then save the form as **EmployeeList**.
2. In Layout view, make the following changes to the *EmployeeList* form:
   1. Remove the form title from the control layout, and then edit the form title to **Employee List**.
   2. Apply the **Integral** theme to the *EmployeeList* form only. (*Tip:* Be certain that you are only applying this theme to the *EmployeeList*form.)
   3. Save the form.
3. In Form view, use the *EmployeeList* form to navigate to the third record (with Employee ID 108), and then change the Employee Last field value to **Summers**. Navigate to the last record (with Employee ID 199), and then change the Title field value to **Billing Manager**. Close the form.
4. Use the Form Wizard to create a form based on the *Billing* table. Include all fields in the form, use the Columnar layout, and specify the title **BillingData**.
5. Switch to Layout view and edit the form title in the *BillingData* form so that it appears as **Billing Data** (two words). Change the font color of the form title to the **Dark Blue, Text 2** (4th column, 1st row in the Theme Colors gallery). (*Tip:* If this color is not available, check to confirm that the *Office* theme is applied to this form. In step 2, you may have accidentally applied the *Integral* theme to all objects in the database – instead of just the *EmployeeList* form.)
6. In the Form header, insert the picture file **support\_NP\_A13\_T4\_P1a\_pst.jpg** available for download from the SAM website. Remove the picture from the control layout, and then move the picture to the right of the form title. Save the form. (*Tip:* To insert this image, you will need to use the Logo option in the Header/Footer section of the Design tab.)
7. In Form view, use the Find command and the *BillingData* form to find the record with the Billing ID A80565. Change the number of sessions to **8** and the Amount to **$800**.

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1. Add a new record to the *Billing* table using the *BillingData* form, using the data shown in Figure 1 below, and then close the form.

# Figure 1: Billing Data Table

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# 

form heading title Billing Data logo
form body first line Billing ID A80644
next line Patient ID A10235
next line Therapist ID 501
next line Start Date 2/23/2016
next line End Date 3/17/2016
next line Sessions 8
next line Amount $800

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1. Use the Form Wizard to create a form containing a main form and a subform as follows:
   1. Select all fields from the *Therapist* table for the main form.
   2. Select the **PatientID**, **StartDate**, and **EndDate** fields from the *Billing* table.
   3. Choose the option to view the data by therapist.
   4. Select the **Datasheet** layout for the subform.
   5. Specify the title **TherapistsAndBilling** for the main form and **BillingSubform** for the subform.
2. Switch to Layout view and edit the title in the main form to **Therapists and Billing**, and then change the font color of the title to the **Dark Blue, Text 2** (4th column, 1st row in the Theme Colors gallery). (*Tip:* If this color is not available, check to confirm that the *Office* theme is applied to this form. In step 2, you may have accidentally applied the *Integral* theme to all objects in the database – instead of just the *EmployeeList* form.)
3. Resize the Patient ID, Start Date, and End Date columns in the subform to best fit the data they contain. Resize the width of the subform as shown in Figure 2 below.

# Figure 2: Therapists and Billing Form

form title Therapists and Billing
form body first line Therapist ID 222
next line Location ID A
next line Therapist First Richard
next line Therapist Last Martinez
next line Specialty Spinal disorders
next line Certification MPT
next line Hire Date 5/31/2009
next line Accepts Minors unchecked
next line Billing label Billing subform
subform fields Patient ID, Start Date, End Date
first record A10526, 2/1/2016, 2/17/206
next record B15264, 3/2/2016, 3/17/2016
form record 1 of 12

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1. In Form view, Use the *TherapistsAndBilling* form and the Find command to find the record with Therapist ID 542, and then update the Certification field value to **DPT**. Save and close the form.
2. Use the Report Wizard to create a report based on the primary *Patient* table and the related *Billing* table, as follows:
   1. Select the **PatientID**, **PatientFirst**, **PatientLast**, and **BirthDate** fields from the *Patient* table.
   2. Select all fields from the *Billing* table except for the **PatientID** field.
   3. View the data by patient and do not select any additional grouping levels for the report.
   4. Sort the details records in ascending order by **BillingID**.
   5. Select the **Outline** layout and **Landscape** orientation for the report.
   6. Specify the report title **PatientBilling**.
3. Switch to Layout view and apply the **Integral** theme to the *PatientBilling* report only. Edit the report title for the *PatientBilling* report to **Patient Billing** (two words).
4. Resize and reposition the following objects in the *PatientBilling* report in Layout view, and then scroll through the report to make sure all field labels and field values are fully displayed:
   1. Resize the Patient ID, Patient First, Patient Last, and Birth Date field label boxes on their right sides, decreasing their widths so that the field label boxes are as wide as the values they contain.
   2. Move the Patient ID, Patient First, Patient Last, and Birth Date field value boxes to the left, so they are closer to their field labels, to decrease the amount of whitespace between the field label and field value boxes for each field.
   3. Resize the Birth Date field value box on its right side, decreasing its width so that the field value box is as wide as the values it contains.
   4. Resize the Amount field label box and the Amount field value box on their right sides to decrease their widths by approximately 75 percent, then move the Amount field label and value box closer to the Sessions field (as shown in **Figure 3**.)
   5. Scroll to the bottom of the report, and then resize the control that contains the page number on its right side to decrease its width so that it is only as wide as the “Page 1 of 1” value it contains. Use an arrow key to move the page number control to the left so that its right edge aligns with the right edge of the Amount field in the report.
   6. Save the report.
5. Use conditional formatting in the *PatientBilling* report to format contract amounts that are equal to or greater than $1,000 in a bold, red font, as shown in Figure 3 below. Display the report in Print Preview and review its pages, and then save and close the report.

# Figure 3: Patient Billing Report

report title Patient Billing
report body first line Patient ID A10235
next line Patient First Robert
next line Patient Last Layna
next line Birth Date 6/15/1982
next line Billing ID Therapist ID Start Date End Date Sessions Amount
next line A80643 501 2/2/2016 2/18/2016 6 $800
next line A80655 501 2/23/2016 3/17/2016 8 $800
next line Patient ID A10486
next line Patient First Richard
next line Patient Last Farmer
next line Birth Date 10/31/1986
next line Billing ID Therapist ID Start Date End Date Sessions Amount
next line A80342 605 3/7/2016 3/28/2016 10 $1,000 bold red

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