Microsoft Access 2003 Quick Tutorial

<u>Starting Access:</u>

1. If there is no Access shortcut on the desktop, select **Start**, then **Programs**, then Microsoft Office, and then Access.
2. When access is open select **File** and then click on **Blank Database** to create a new database and then click on **OK**

   OR

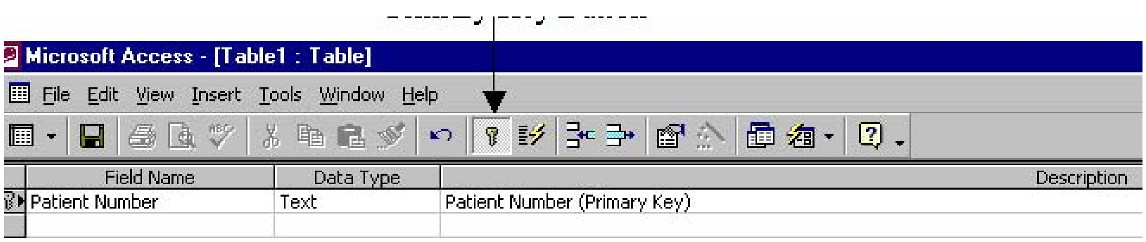
If you have a database on file click on **Open Existing Database** and then select the file that you wish to open and click on **OK**.

3. Next you will be asked to name the database you are about to create. Select which directory you would like to save the file in and in the **file name** box delete db1 and type in ABC-Clinic. Then click on the **Create** button.

Tables

<u>Creating a Table:</u>

1. In the Database window, double-click on **Create Table in Design View.**
2. Click on the maximize button for full screen view.
3. Type **Patient Number** in the Field Name column and press the TAB key.
4. Because Text is the correct type, press the Tab key to move to the description column. Type Patient Number (Primary Key) as the description. Click on the **Primary** key button and then enter 4 into the **Field Size** text box.
5. Now use the steps 3 to 4 to make the following entries into the Client Table.



Field Name	***Data Type***	***Field Size***	***Primary Key?***	***Description***
Patient Number	Text	4	Yes	Patient Number (Primary Key)
Last Name	Text	10		Last Name
First Name	Text	8		First Name
Address	Text	15		Street Address
City	Text	15		City
Province	Text	2		Province(two character)
Area Code	Text	6		Area Code (6 characters)
Balance	Currency			Current Balance
Insurance	Currency			Expected amount from insurance
Ther Number	Text	2		Number of Patient's Therapist

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Saving a Table:

1. Click on the **Save** button on the toolbar or select **File** and **Save As**. Type in the name of the table, i.e, Patient, in the **Table Name** text box and then click **OK.**
2. Close out the table by clicking on the close button or select **File** and **Close.**

Adding Records to a Table:

1. In the Database window, click on the **Patient** table and then click on **Open** (Or double click on **Patient**).
2. Add in the following information

Patient Number	Last Name	First Name	Address	City	Province	Area Code	Balance	Insurance	Ther Number
AM53	Mills	Ashton	216 Piggy Lane.	Trenton	NF	A2R6Y5	$215.99	$100.00	11
AS62	Alton-	Scripps	72 Walter Dr.	Victoria	NF	A3F2A1	$134.99	$45.00	12

i.e. For example, type AM53 as the first patient number then press the TAB key to move to the next field. Enter the Last Name, then press Tab again to go to the next field, and so on.

Adding Additional Records:

1. Within the Patient table select **Insert** and then **New Record.** Access will place the insertion point in position to enter a new record. However, this can happen automatically as you are typing
2. Add the remaining records to the patient table.

Patient Number	Last Name	First Name	Address	City	Province	Area Code	Balance	Insurance	Ther Number
BR31	Bryce	Roger	617 College	St. John's	NF	A4T7R3	$96.00	$0.00	08
DI32	Dalton	Irene	41 Loopy Dr.	St. John's	NF	A4T7E3	$875.00	$600.00	14
GC92	Grant	Thomas	247 Fuller	St. John's	NF	A6T2C6	$273.00	$150.00	05
JG22	Jenkins	Glen	201 Plymouth	St. John's	NF	A6R2C6	$276.00	$0.00	08
LI66	Lawrence	Irving	912 Devonshire	St. John's	NF	A6RE4R	$346.00	$175.00	05
PE33	Pezato	Eduardi	346 Venor	St John's	NF	A4T5C3	$467.12	$500.00	14
PE76	Perez	Enzo	216 Four Mile	St. John's	NF	A3E2D4	$216.00	$0.00	08

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Previewing and Printing Contents of the Table:

1. Select the Patient Table in the Database window.
2. Click on the Print Preview button  or select **File** and **Print Preview.**
3. Next select **File** and **Page Setup**. This allows you to chose between different page sizes and layouts, as well as change the page margins. I.e. landscape or portrait view.
4. Click on the **Page** tab; click on **Landscape** and then click on the **OK** button.
5. If the entire table is not on the page change the Left and Right text box margins. Try .333 in the left and right margins text boxes.
6. Click the **OK** button.
7. Click the Print button  to print the report or select **File** and **Print.** Then close the Preview window.

To Create Additional Tables:

1. Make sure the ABC-Clinic database is open and the **Table** tab is selected and click on the **New** button.
2. Click **Design View** in the New Table dialog box and click on **OK**.
3. Next enter the data for the fields for the Therapist table. Be sure to click the Primary key button when you enter the Number field.
4. Now, enter the following into the table.

Field Name	Data Type	Field Size	Primary Key	Description
Ther Number	Text	2	YES	Therapist Number (Primary Key)
Last Name	Text	10		Last name of therapist
First Name	Text	10		First name of therapist
Address	Text	15		Street Address
City	Text	15		City
Area Code	Text	6		Area Code(6-Characters)
Billing	Currency			Total billing amount of therapist
Paid	Currency			Amount already paid by patient or insurance company

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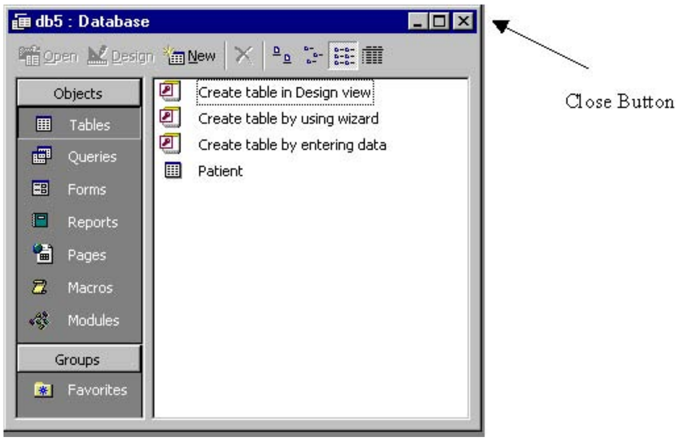
<u>Closing a Table and a Database:</u>

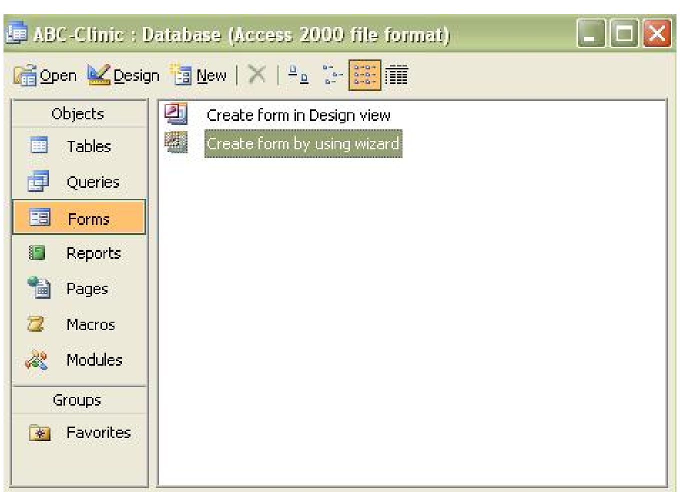
1. Click on the Close button for the Patient: Table window (Be sure to save first)!
2. Click on the Close button for MS Access or click on **File** and **Exit.**



Forms

<u>Creating a Form:</u>

1. Make sure the ABC-Clinic database is open and select the **Patient** table.
2. From the menu on the left, click **Forms**. Then double-click **Create using Wizard**.
3. Select fields for the form you want to make. Click **next**.
4. Choose the rest of the options you would like for the form and click **next** after each selection.
5. Name your form Patient and click **Finish**.



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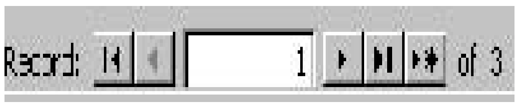
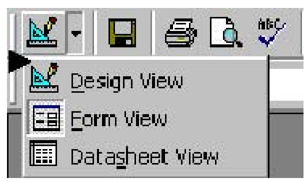
<u>Opening a Form and Using a Form:</u>

Forms can be used to add new records or change existing ones. It allows you to view one record at a time.

1. In the database window select the **Forms** tab. The form patient should appear.
2. To open the form Patient, select Patient and then click **Open.**
3. To view the next record in form view, click on the arrow next to the text box at the bottom.
4. 

5. You can switch back and forth from datasheet view to form view by clicking on the **Form View** button. This button is located in the top left corner of the screen when a form is open.
   Form View



Reports

<u>Creating a Report:</u>

1. Click on the **Tables** tab in the database window. Make sure the Patient table is selected. From the **Object** menu click **Reports.**
2. Next double-click **Create report using wizard**.
3. From the Available Fields menu choose the required fields and click the ‘ > ‘ symbol to add them to Selected Fields. When done, click **Next**.
4. Choose sort by Patient Number and select A – Z. Click the **Next** button again because you will not need to make any changes to the next screen.
5. The style presented is acceptable but make sure that corporate is select and then click the **Next** button again.
6. Type **Financial Report** as the new title and click on the **Finish** button.
7. To see the entire report, click on the magnifying glass mouse pointer somewhere within the report.
8. Close the report by clicking on the close button for the Financial Report window, or select **File** and **Close.**

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Queries

A query is a simple question represented in a way that Access can understand. To find an answer to a question you must first create a query and then run it.

To Create a Query:

1. With the ABC-Clinic database open, select the **Tables** tab and then select the **Patient** table. From the **Object menu** select **Queries**.
2. Double click on **Create query in Design view.**
3. From the Show Table window, add the following tables: **Patient Number, Last Name, First Name** and **Ther Number.** Then close the Show Table window.
4. Maximize the query window by clicking on the maximize button.
5. Next maximize the Patient window by dragging on the corners to make it larger.
6. Double-click the **Patient Number** field to include it in the query.
7. Double-click the **Last Name** field to include it in the query. Do the same for the **First name** and **Ther Number** fields by double clicking on them.

Running a Query:

1. Click on the **Run** button on the toolbar. The query is executed and the results are displayed.

To Include All Fields in A Query:

1. Maximize the window containing a field list for the **Patient** Table.
2. Double-click on the asterisk (*) in the field list box and then click on the **Run** button.
3. Click the **Query View** button and select **Design View** to return to the **Select Query** window.

To Clear a Query:

1. Click **Edit** on the menu bar in design view.
2. Click **Clear Grid.**

Using Text Data in a Criterion

1. One-by-one, double-click the **Patient Number, Last Name, First Name,** and **Balance** fields to add them to the query.
2. Then click in the **Criteria** entry for the first field in the design grid.
3. Type **DI32** as the criteria for the **Patient Number**, and then click on the **Run** button. (Be sure to type an I and not the number 1.) The query should show you the result, which lists the patient whose number is DI32.

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<u>Using Wildcards:</u>

1. Asterisk (*) represents any collection of characters. I.e., pe* represents Pe followed by any collection of characters.
2. Question mark (?) represents any individual character. I.e., t?m represents the letter T followed by a character followed by the letter m. Such as Tim or Tom.
3. Use the Query view button on the toolbar to return to the select query window. On the **Edit** menu select **Clear Grid.**
4. Include the Patient Number, Last Name, First Name, and Address fields in the query and click the Criteria entry for the second field.
5. Type **LIKE PE*** as the entry and click on the **Run** button. The results display only the patients whose names start with PE.

If you wish to run a query by using certain information but do not want that information shown in the results you can click on the box in the **Show** area so that the check mark does not appear. This means that the query will use the information from that field to run the query but will not show results from this field.

<u>Using a Number in Criterion</u>:

1. Use the query view button to return to the Select Query window. On the Edit menu select Clear Grid.
2. Include the Patient Number, Last Name, First Name, Balance, and insurance fields in the query.
3. Type **0** as the criterion for the Insurance field. You need not enter a dollar sign or decimal point in the criterion.
4. Click on the **Run** button.
   The results display only those patients who have an insurance amount of $0.00 are included.

<u>Using Comparison Operators:</u>

1. Clear the query grid and include the Patient Name, First Name, Balance, and Insurance fields in the query.
2. Type **>500** as the criterion for the Balance field.
3. Click on the **Run** button. The results display only those patients who have a balance more than $500 are included.

<u>Using Compound Criteria:</u>

1. Often you will have more than one criterion that the data for which you are must satisfy. In **AND** criterion each individual criterion must be true in order for the compound criterion to be true.
2. In **OR**, criterion are true provided either individual criterion is true. An OR criterion would allow you to find those patients who have a balance greater than $500 or whose therapist is therapist 08.

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To use criterion involving AND:

1. Use the Query View button to return to the Select Query window. On the **Edit** menu select **Clear Grid.**
2. Include the Patient Number, Last Name, First Name, Balance, Insurance and Ther Number fields in the query.
3. Click the criteria entry for the Insurance field and type **0** as a criterion for the insurance field. Click the criteria for Ther Number field and type **08** as the criterion.
4. Click the **Run** button.

The results display only those patients whose insurance is $0.00 and whose therapist number is 08 are included.

To use criterion involving OR:

1. Click the criteria entry for the Insurance field and delete the **0** that was entered earlier.
2. Click the criteria entry for the Balance field and enter **>500** as the criterion. Click the criteria entry for the Ther Number field and delete the entry **08.**
3. Click on OR entry for the Ther Number field and type **08** as the entry.
4. Click on the **Run** button.

The results display only those patients whose balance is more than $500 or those whose therapist
number is 08 are included.

Joining Tables:

1. Use the query view button to return to the select query window. On the **Edit** menu select **Clear Grid**.
2. Right-click any open area in the upper pane of the Select Query window.
3. Click **Show Table** on the shortcut menu.
4. Click **Therapist** to select the therapist table, and then click the **Add** button.
5. Include the Patient Number, Last Name, First Name, and Ther Number fields from the Patient table and the Last Name and First Name fields in the Therapist table.
6. Access automatically indicates the relationship between the two tables by inserting a line that joins the relationship field between the two tables.
7. **Run** the query. The results display data from the Patient table as well as data from the Therapist table.

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Restricting Records in a Join:

1. Use the Query View button to return to the Select Query window.
2. Add the **Balance** field to the query. Type **>200** as the criterion for the **Balance** field and then click the **Show** check box for the Balance field to remove the check mark.
3. **Run** the query.

The results display only those patients with a balance more than $200 appears in the result. The Balance field is not displayed.

Using Computed Fields in a Query:

1. Return to the Select Query window. Right-click any field in the list of fields in the Therapist table.
2. Click **Remove Table** to remove the therapist table. On the **Edit** menu select **Clear Grid**. Click the left scroll arrow so that no space exists between the scroll arrow and the scroll box.
3. Include the Patient Number, Last Name, and First Name fields. Click the Field entry in the fourth column in the design grid to select the field. Right-click and then click Zoom on the shortcut menu.
4. Type **Patient Amount:[Balance]-[Insurance]** in the Zoom dialog box that appears and click on the **OK** button.
5. **Run** the Query.

The results display the patient's amounts. The parentheses around the $32.88 indicate it is a negative
number; that is, the patient evidently has already paid more than the patient portion.

To Save a Query:

Click on the close button of the query window or select **File** and **Close**. Give a name for the query and click on the **OK** button.