

Report Writer Masterclass

Join the multi-part masterclass to enhance your expertise and better utilise your accessplanit Report Writer!



7 part blended course



4 weeks



£995 per group*

* Up to 4 people

Masterclass Course Sessions

Each session must be completed to proceed to the next session in the masterclass

1 Introduction to the Report Writer tool



2 hour trainer-led webinar

During this session, you will learn:

- What is the Report Writer tool, and when is it useful
- How to add, group and sort 'fields' on reports
- How to filter the results of reports

2 Accessing & Using the Report Writer



Hands on self-led practical

During this activity, you will:

- Access and edit an existing report
- Add some additional fields to the report
- Add an additional filter to the report

3 Getting to know your database



2 hour trainer-led webinar

During this session, you will learn:

- Database theory
- Key accessplanit database sources
- How to add additional data sources to reports

4 Design a Report



Hands on self-led practical

During this activity, you will:

- Define a report that you plan to build
- Determine the fields and filters that will be used in your report

5 Create a report from scratch



2 hour trainer-led webinar

During this session, you will learn:

- How to build a Report Writer report from scratch
- How to build your chosen report from scratch

6 Build a Report



Hands on self-led practical

During this activity, you will:

- Build a new report from scratch
- Use your Report Writer skills to format the report

7 Additional Report Writer features



2 hour trainer-led webinar

During this session, you will learn:

- How to present your data in alternative ways using charts, summary tables, and pivot reports

To book the Report Writer masterclass for your business, please get in touch with your CSM at

customersuccess@accessplanit.com

To ensure you get the most out of this training, we recommend that attendees have 6+ months of experience with the accessplanit platform.

This foundational knowledge supports the concepts covered in this masterclass.

Please note that if the training is required again in the future, this will be chargeable.