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| SharePoint Report Wizard™ |
| Quick Start |
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| **Last Updated: 4/12/2018** |

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This document will help users to build reports using the SharePoint Essentials Toolkit Report Wizard™.

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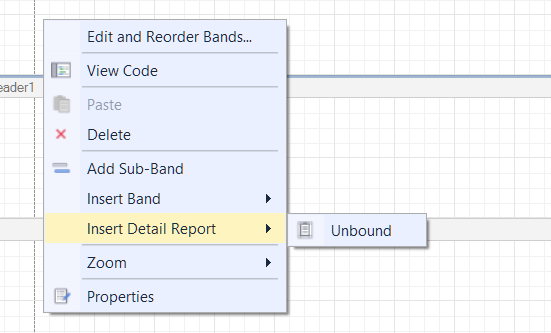
# Introduction

Thank you for trying our products. The SharePoint Report Wizard is part of the SharePoint Essentials Toolkit Suite, you can use it to build personalized (and branded) reports based on reports generated from the SharePoint Essentials Toolkit. The Report Wizard also allows you to build reports on SharePoint content, such as building reports and charts against metadata gathered from one or more lists in SharePoint. This guide will help you get perform these reporting tasks.

# Report Wizard

Instructions:

1. Create a New Report
2. Right click on the report and click “Insert Detail Report (Unbound)”



1. Right click on the report and click “Insert Band (Group Header)”
2. Click on the band text “DetailReport”
3. From the Properties panel, click on Datasource
4. Click "Add New" to add a new datasource for the report
5. select MS Excel or select an existing datasource
6. Select MS Excel
7. Then, browse to the SharePoint Essentials Toolkit MS Excel or CSV report to use. Normally this is located in the My Documents\QiPoint\Reports folder
8. NOTE: You can also export from a SharePoint list to MS Excel and report on the SharePoint List metadata!
9. Click next and follow the instructions
10. Once the Datasource is configured, click on the Fields tab and drag and drop fields into the GroupHeader band (such as Site Title) and drag other fields into the Detail1 section.

More Help coming soon!

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Questions? Need Help?

Contact us at [support@qipoint.com](mailto:support@qipoint.com)

Chat Live / Create support ticket at <http://support.qipoint.com>