**Integration Documentation**

**Documenting the Process of Importing Data into Excel**

 **Open Excel:** Microsoft Excel

 **Navigate to Data Tab:**

* Go to Data > Get Data > Choose the appropriate source (From SQL Server, From Access, etc.).

 **Connection Details:**

* In order to connect to the server provide detail, including server name, database name, and any credentials.

 **Select Data:**

* Specify which tables or queries are selected for import.e.g products.

 **Load Data:**

* Create a new worksheet or appending to an existing one and load the data.

**Testing Functionality**

1. **Interactive Elements:**
   * **Test Slicers and Filters:**
     + Ensure that slicers, drop-down lists, and other interactive elements correctly filter and update the data.
   * **Timeline Controls:**
     + Verify that timeline controls filter data by date as expected.
2. **Check PivotTables and Charts:**
   * **Functionality Test:**
     + Interact with PivotTables to ensure they summarize data correctly.
     + Check that charts reflect accurate and updated data from PivotTables or raw data.
3. **Verify Formulas and Calculations:**
   * **Formula Accuracy:**
     + Review and test formulas and functions used in the dashboard to ensure they produce correct results.
   * **Calculation Tests:**
     + Perform sample calculations to confirm that they match expected outcomes.
4. **Performance Testing:**
   * **Loading Time:**
     + Measure how long the dashboard takes to load, especially with larger datasets.
   * **Responsiveness:**
     + Check that interactive elements respond promptly and accurately to user inputs.