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Care - "Your Feline's World" shows personalized attention
Quality - "Excellence" reflects the premium nature of the brand

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Incident Management System – End-to-End Guide

This documentation provides an easy, step-by-step guide to creating:

1. An Incident Submission Form (Power Apps or SharePoint List)
2. Automated Notifications (Power Automate)
3. An Incident Tracking Dashboard (Power BI)
4. Explanation of formulas used in Power Apps

1. Create a SharePoint List for Incidents

Step 1: Create a SharePoint List

1. Go to **SharePoint → Site Contents → New → List**
2. Choose **Blank List** and name it: **Incident Management System**

Step 2: Add Columns

Add the following fields:

- **Title** (Single line text)
- **Description** (Multiple line text)
- **Incident Category** (Choice)
- **Severity** (Choice: Low, Medium, High)
- **Incident Status** (Choice: Open, In Progress, Closed)
- **Created Date** (Date)
- **Assigned To** (Person)

2. Create the Incident Submission App in Power Apps

Step 1: Start from the SharePoint List

1. Open **Power Apps → Create → Power Apps from Data**
2. Select **SharePoint → Choose your Incident Management System** list
3. Power Apps auto-generates 3 screens:
   - **Browse Screen** – view the list of incidents
   - **Details Screen** – view selected incident

○ **Edit/New Form Screen** – add or edit incident

Step 2: Customize the Form Screen

1. On the **EditForm Screen**, select the **EditForm** component
2. Choose fields to display
3. Add dropdowns for Status & Severity

Step 3: Add a "Submit Incident" Button

● Insert → Button → Set **OnSelect**: SubmitForm(EditForm1)

Step 4: Add Navigation Between Screens

Use the **Navigate()** function to move between screens.

3. Power Automate – Notifications

Step 1: Create a Flow

1. Go to Power Automate → Create → **Automated Cloud Flow**
2. Trigger: **When an item is created** (SharePoint)
3. Site: Select your SharePoint site
4. List: **Incident Management System**

Step 2: Add Notification Actions

You can choose:

● **Microsoft Teams → Post a message in a channel**
● **Send an Email → Outlook**

Example Email Structure:

● **Subject:** New Incident Submitted – @{Title}
● **Body:**
  ○ Incident Title
  ○ Description

- ○ Severity
- ○ Submitted By
- ○ Link to list item

Step 3: Save and Test

1. Submit a new incident in Power Apps
2. Check Teams/email notifications

4. Build a Power BI Dashboard

Step 1: Load Data

1. Open Power BI Desktop
2. Select **Get Data → SharePoint Online List**
3. Enter site URL
4. Choose the **Incident Management System** list

Step 2: Create Key Visuals

- **Pie Chart:** Incidents by Severity
- **Bar Chart:** Incidents by Category
- **Card Visual:** Total Open Incidents
- **Line Chart:** Incidents created over time
- **Table:** All incidents with filters

Step 3: Add Status Slicer

- Insert → Slicer → Select **Incident Status** column

Step 4: Publish Dashboard

1. Publish to Power BI Service
2. Share or embed for Teams

Explanation of Power Apps Formulas

Below are the formulas provided, along with simple explanations.

1. `Navigate(EditForm1)`

This formula moves the user to the **EditForm1 screen**. Typically used when clicking 'Add New Incident'.

Meaning: "Go to the form screen so the user can submit or edit an incident."

2. `Navigate(BrowseGallery1)`

Takes the user back to the **Browse screen**, where all incidents are listed.

Meaning: "Return to the main list view of incidents."

3. `Navigate(AllIncidentsScreen)`

Opens the screen that displays all incidents, filtered or unfiltered.

Meaning: "Move to the screen that shows all incidents."

4. Remove Formula

Remove([@'Incident Management System'], BrowseGallery1.Selected);
If (IsEmpty(Errors([@'Incident Management System'], BrowseGallery1.Selected)), Back())

Explanation:

- `Remove()` deletes the selected record from the SharePoint list.
- `BrowseGallery1.Selected` refers to whatever item the user clicked.
- `Errors()` checks if the delete action has any issues.
- `IsEmpty()` means there were **no errors**.
- `Back()` navigates back to the previous screen.

Meaning: "Delete the selected incident. If nothing went wrong, go back to the previous screen."

5. Sort + Filter Formula

```
SortByColumns(
    Filter(
        [@'Incident Management System'],
        StartsWith(Title, TextSearchBox1.Text) && 'Incident Status'.Value = "Open"
    ),
    "Title",
    If(SortDescending1, SortOrder.Descending, SortOrder.Ascending)
)
```

Explanation:

1. **Filter()**
   ○ Finds incidents where:
      ■ The title starts with the search text
      ■ Status is "Open"

2. **StartsWith(Title, TextSearchBox1.Text)**
   ○ Live search feature

3. **SortByColumns()**
   ○ Sorts results by title

4. **If(SortDescending1, ...)**
   ○ If the sort icon is toggled, change the sort order

Meaning: "Show only open incidents that match the search term and sort them alphabetically based on user preference."

Conclusion

You now have:

- A SharePoint list-based incident database
- A Power Apps submission and management app
- Automatic notifications using Power Automate
- A Power BI dashboard to visualize incident trends and statuses
- Detailed explanation of all formulas used