IRS Enterprise Front Door (EFD) Application – Training Manual

Version 2.0

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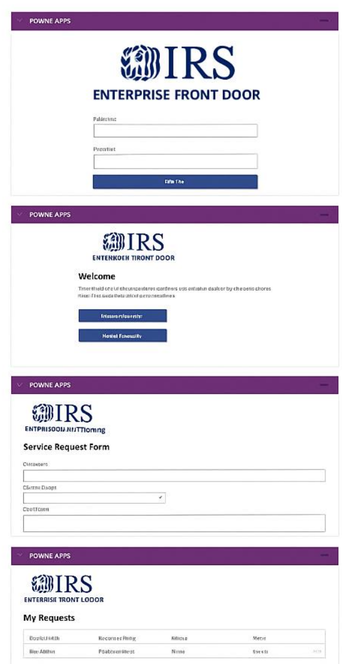

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1. Introduction

1.1 About the EFD Application

The IRS Enterprise Front Door (EFD) Application, built using Microsoft Power Apps, is designed to streamline the intake and approval process for internal IRS project and service requests.

1.2 Intended Audience

This manual is intended for IRS personnel including requesters, validators, approvers, and administrators who interact with the EFD system.

1.3 System Requirements

To use the EFD Application, users need:
- IRS network access
- Microsoft Power Apps license
- Compatible web browser (Edge or Chrome)

2. Accessing the Application

2.1 Logging In

To access the EFD application, visit the Power Apps portal via the IRS internal site. Sign in using your IRS credentials.

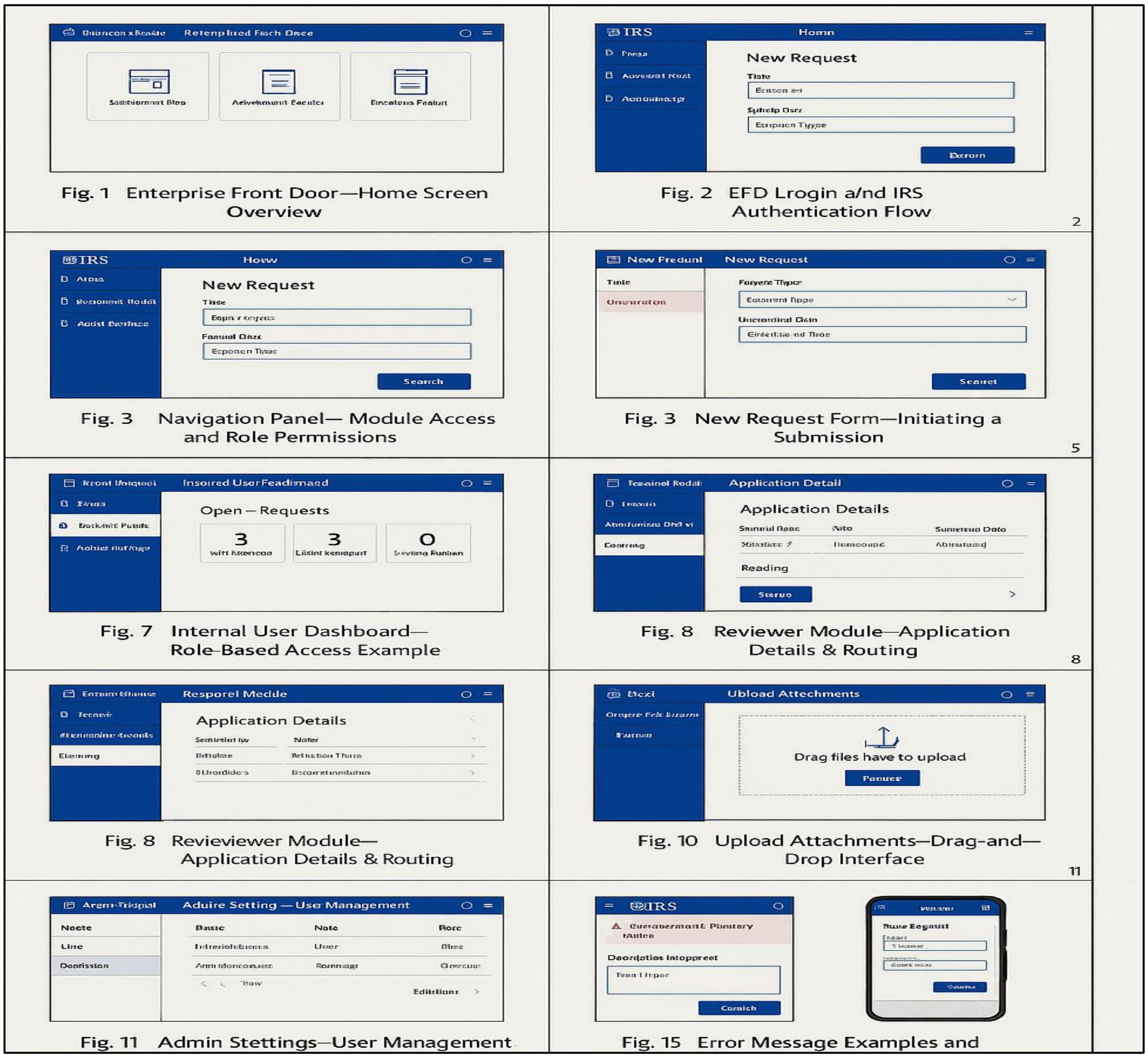

Figure 1. Login Page – EFD Application (Placeholder)

2.2 Troubleshooting Login Issues

If you encounter issues logging in, verify your credentials and ensure you are on the IRS network. Contact the IT Service Desk for further assistance.

3. User Roles and Navigation

3.1 Overview of User Roles

The EFD application supports the following user roles:
- Requesters: Submit new project/service requests.
- Validator: Evaluate submissions and request modifications if necessary.
- Approvers: Final decision-makers who approve or reject requests.
- Administrators: Manage users, forms, and workflows.

3.2 Main Navigation Menu

The left-hand panel provides access to the Dashboard, My Requests, Review Queue, Admin Tools, and Help Center.

Figure 2. Main Dashboard View (Placeholder)

3.3 Dashboard Overview

The dashboard provides a summary of requests by status, including visual charts for quick tracking.

4. Submitting a New Request

4.1 Accessing the Intake Form

Click on the 'New Request' button on the dashboard.

4.2 Completing Required Fields

Fill in all required fields such as request title, project type, justification, and business owner. Use dropdowns and text boxes appropriately.

Figure 3. New Request Intake Form (Placeholder)

4.3 Uploading Supporting Documents

Click on the 'Attach Files' button to upload relevant documents such as business cases, estimates, or architectural diagrams.

4.4 Submitting the Request

Review your inputs and click 'Submit'. You will receive a confirmation message and email notification.

Figure 4. Request Submission Confirmation (Placeholder)

5. Request Lifecycle and Status Updates

5.1 Status Definitions

Request statuses include:

- Draft: Saved but not yet submitted.
- Submitted: Awaiting review.
- Under Review: Currently being evaluated.
- Approved: Request has been approved.
- Rejected: Request has been denied.
- Returned: Sent back to requester for more information.

5.2 Viewing and Tracking Submissions

Click on 'My Requests' to see all submitted requests and their current statuses.

Figure 5. Request Tracker with Status Bar (Placeholder)

6. Reviewer and Approver Functions

6.1 Reviewing a Submitted Request

Navigate to 'Review Queue'. Open a request to read its contents, attached documents, and comments.

6.2 Providing Comments or Edits

Use the 'Comments' section to provide feedback or request edits from the requester.

Figure 6. Validator Comments Box (Placeholder)

6.3 Approving or Rejecting a Request

Click 'Approve' or 'Reject'. A confirmation window will appear. Approved requests proceed to the next phase.

7. Admin Tools and Configuration

7.1 Managing User Access

Admins can add, modify, or remove user roles via the Admin Tools section.

Figure 7. Admin Panel – User Management (Placeholder)

7.2 Modifying Form Fields

Use the Power Apps studio to edit intake form components such as dropdown lists or field labels. Changes should be published only after review.

8. FAQs and Troubleshooting

8.1 Common Errors and Fixes

- Error: 'User Not Found' → Ensure you're logged in with the correct IRS credentials.
- Error: 'Submission Failed' → Check all required fields and attached file size limits.

8.2 Who to Contact for Help

For technical support, contact the IRS IT Service Desk. For application-related questions, email the EFD Admin Team.

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B. Glossary

- EFD: Enterprise Front Door
- Power Apps: Microsoft platform used to build the EFD application
- Validator: IRS personnel reviewing requests
- Approver: Decision-maker responsible for approvals
- Admin: System administrator of the EFD app

C. Version History

Version 1.0 – Initial release – July 2025