IRS Enterprise Front Door (ESFD) Application – Training Manual

Version 3.0

11/12/2024
Prepared by Sung Lee

Sung.M.Lee@irs.gov

Table of Contents

Table of Figures

Return to Top of Section

1. Introduction

1.1 About the ESFD Application

The IRS Enterprise Front Door (ESFD) 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 (ES Front Door Validators and Coordinators) and Suppliers, who interact with the ESFD system.

1.3 System Requirements

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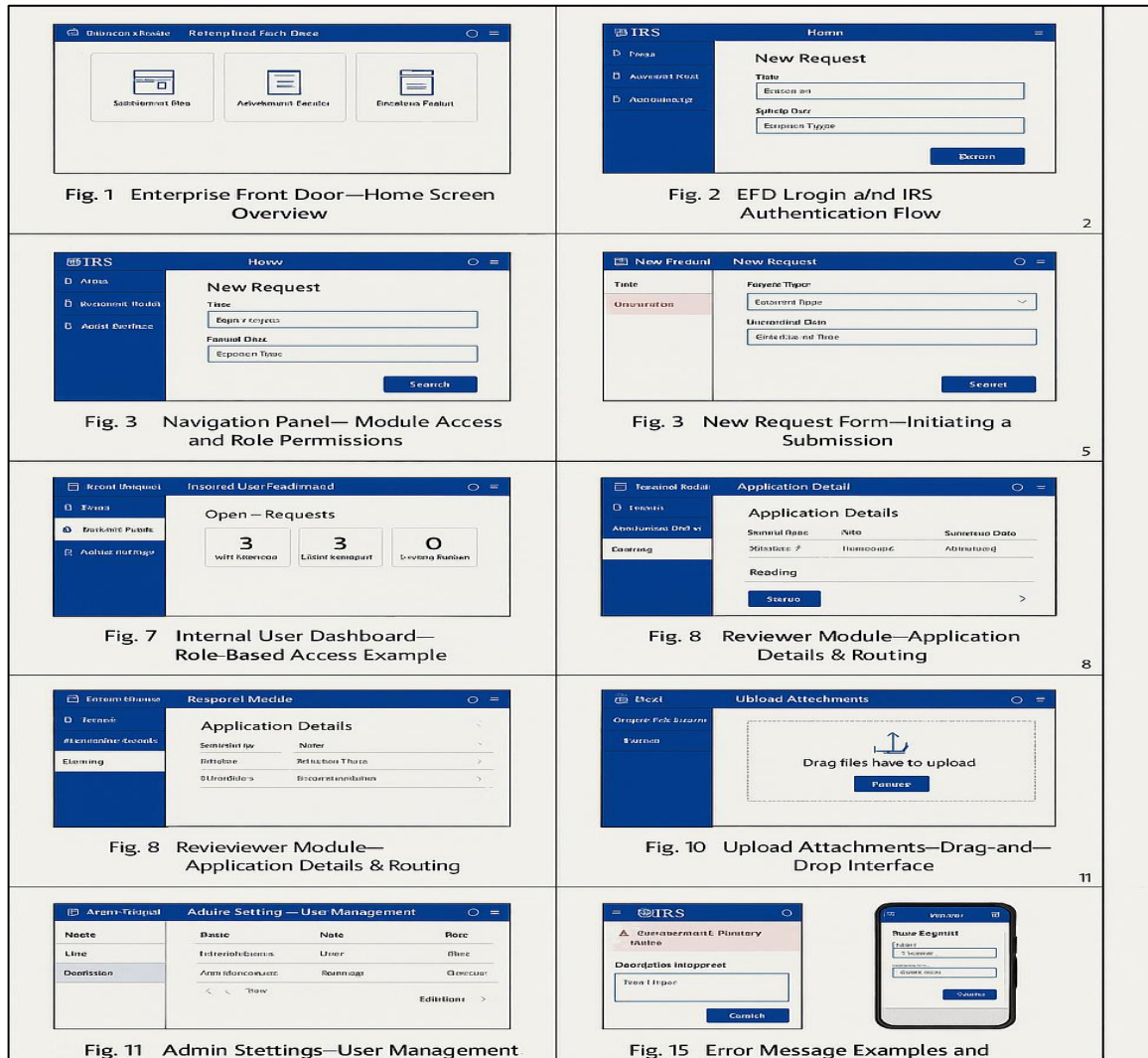

Figure 1 ESFD Application Overview

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 ESFD 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. Request Lifecycle and Status Updates

4.1 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.

4.2 Viewing and Tracking Submissions

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

Return to Top of Section

5. Submitting a New Request

5.1 Accessing the Intake Form

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

5.2 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)

5.3 Uploading Supporting Documents

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

5.4 Submitting the Request

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

Figure 2 Submitting a new request

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.

6.3 Approving or Rejecting a Request

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

Figure 3 Request Workflow

Return to Top of Section
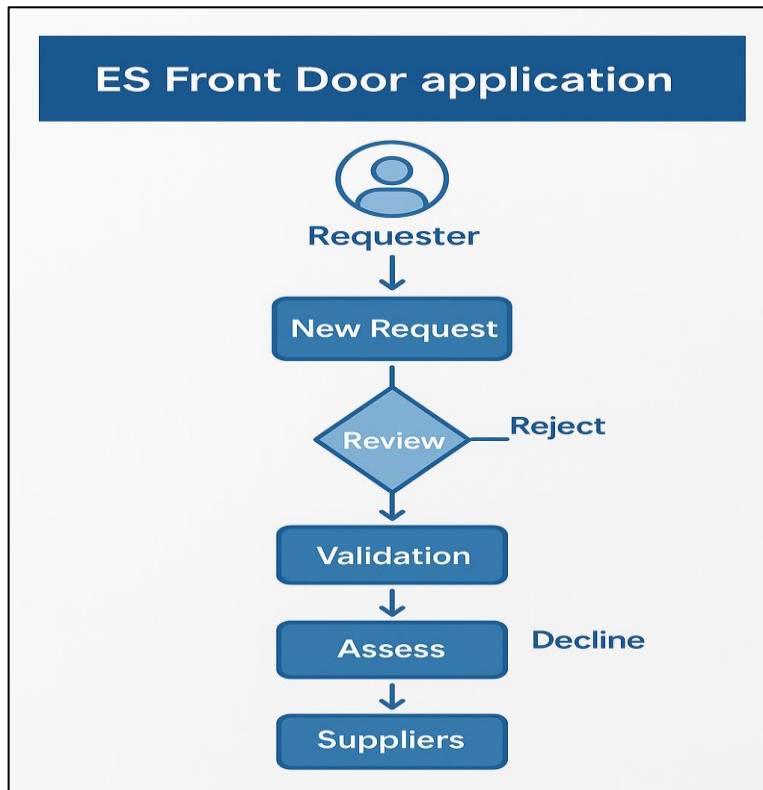
7. Admin Tools and Configuration

7.1 Managing User Access
Admins can add, modify, or remove user roles via the Admin Tools section.

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.

Return to Top of Section

8. FAQs and Troubleshooting

8.1 Common Errors and Fixes

Error Message or Issue	Description	Recommended Action
"Missing Required Fields"	A form was submitted without completing required inputs	Ensure all fields marked with * are filled
Scroll Lock in Validation Form	Pop-up blocks or hides lower fields	Use "Return" button to reset layout
Incorrect Document Type Selected	Wrong type selected via full-screen pop-up	Re-open pop-up and reselect correct document type
User cannot access Supplier View	Role misconfiguration	Navigate to Manage Permissions and verify roles

8.2 Who to Contact for Help

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

Return to Top of Section

9. Best Practices

✓ Always review request details before submitting.

✓ Use appropriate document types and attach relevant files.

✓ Validators should confirm all data before updating status.

✓ Suppliers should update Substatus and add relevant notes.

Return to Top of Section

10. Project Glossary

Field Name	Description	Example Input
ICAD Number	Internal control tracking ID (Must be 6 or 7 digits)	1234567
UWR Number	Unified Work Request number	UWR-00984
ES Division	Business division requesting service	Applications Dev
Substatus	Secondary status indicating detailed progress	Supplier Review in Progress
Validator Feedback	Comments provided by Validators during review	Please clarify project scope.
Service Validation Form	Form used to verify service compliance	Completed by FD Team
FD Team	Front Door Team responsible for validations	Team A
Requester	User who initiates a service/project request	John Doe
Approver	IRS official who approves or rejects requests	Jane Smith
Supplier	Entity responsible for fulfilling service requests	Supplier X
Admin Tools	Section for user and form management	User Role Configuration
Intake Form	Digital form for new requests	Request Intake Page
Review Queue	Dashboard for pending reviews	Validator's Review Panel
Status Tracker	Visual tracker of request progress	Dashboard Metrics

Power Apps Portal	Platform hosting the ESFD Application	apps.powerapps.com
Draft Status	Saved requests not yet submitted	Draft Stage
Returned Status	Requests sent back for edits	Needs More Info
Audit Logs	Admin feature to track changes	Admin Panel Logs
Confirmation Modal	Pop-up confirming submission	Submission Success Message

C. Version History

Version 3.0 – Initial release – 11/12/2024