WEFO Online Training Module – Contact Management

Adding and Deleting your Contacts

Please Use The Down Arrow On Your Keyboard
To Progress Through the Screens.

Aim

This presentation is designed to take users through the process of how to add and delete the individuals in your organisation using the WEFO Online service.

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Project Contacts

Please ensure, prior to adding the user on the system that a Project Contact Form is completed and forwarded to your Welsh Government Contact.

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WEFO Online Overview

Please note, this module was created using a test environment. Any names or ID's displayed are fictitious.

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WEFO Website

Navigate to http://gov.wales/funding/eu-funds/wefo-online/ and select the 'WEFO Online' link from the centre of the window.

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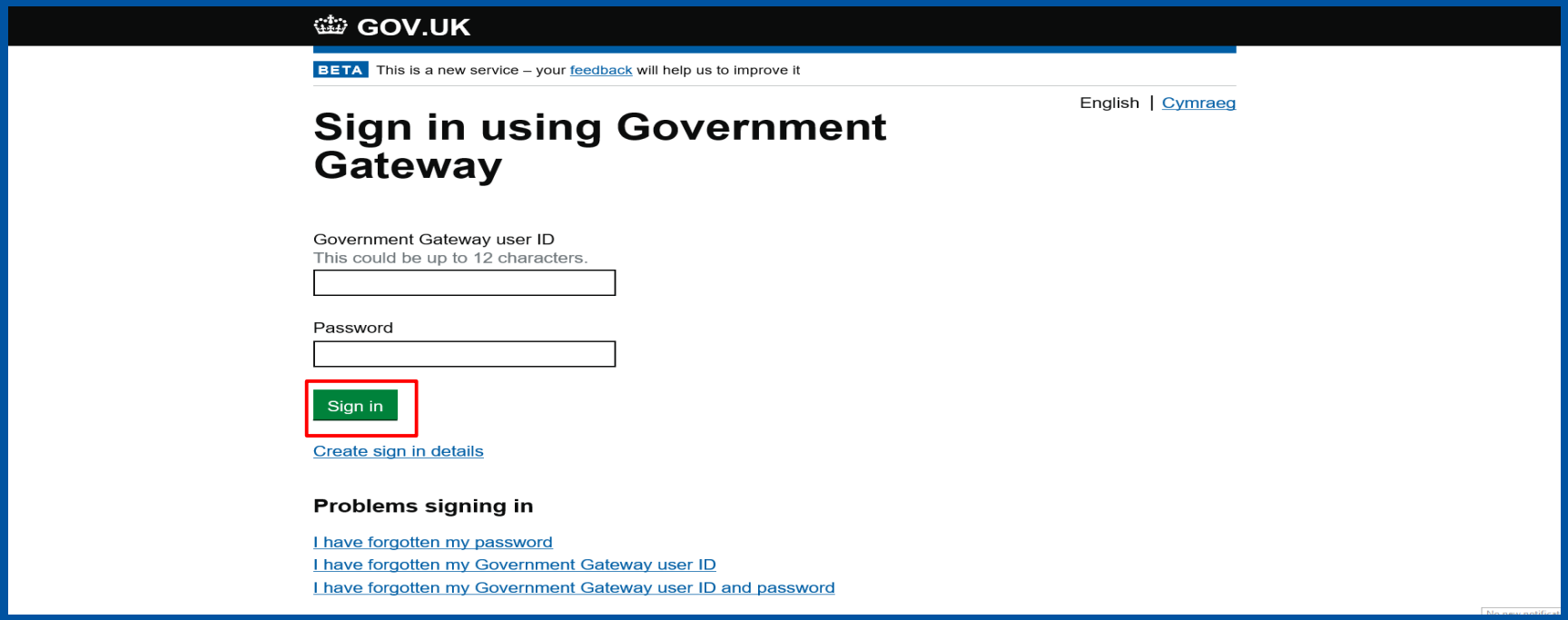
Government Gateway Login

From the Government Gateway login screen, enter your details and select 'Sign in'.



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WEFO Online

Once logged into WEFO Online select the 'Government Gateway Group Management' link.

WEFO Online
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Welsh European Funding Office

Cronfeydd yr UE: Buddsoddi yng Nghymru
EU Funds: Investing in Wales

Welcome Mr Jon Smith | WEFO Online Desk Instrcuctions

Government Gateway Group Management |
Government Gateway Profile Management | Cymraeg | Logout

System Availability

Pre-Prod Scheduled Maintenance: WEFO Online

WEFO Online will undergo scheduled maintenance as shown below

Date	Time	Status
11/08/2014	00.00 - 23.59	RED
12/08/2014	00.00 - 06.59	RED

Maintenance Status'

AMBER (Intermittent availability)

During this time access to WEFO ONLINE will be interrupted. Customers will experience some disruption affecting both responses from, and connecting to WEFO ONLINE at intervals throughout this time frame. The length of interruption varies and cannot be predicted accurately.

AMBER (Reduced Resilience)

During this time, WEFO Online will be available. However, the service it will be running will be under reduced resilience, meaning some parts of the system do not have failover capabilities and as such there is an increased risk of loss of service.

RED

During this time WEFO ONLINE will be unavailable for the duration of the work. Customers will not be able to download or submit documents, access the expression of interest or delivery profiles or make claims.

Proceed To Case List

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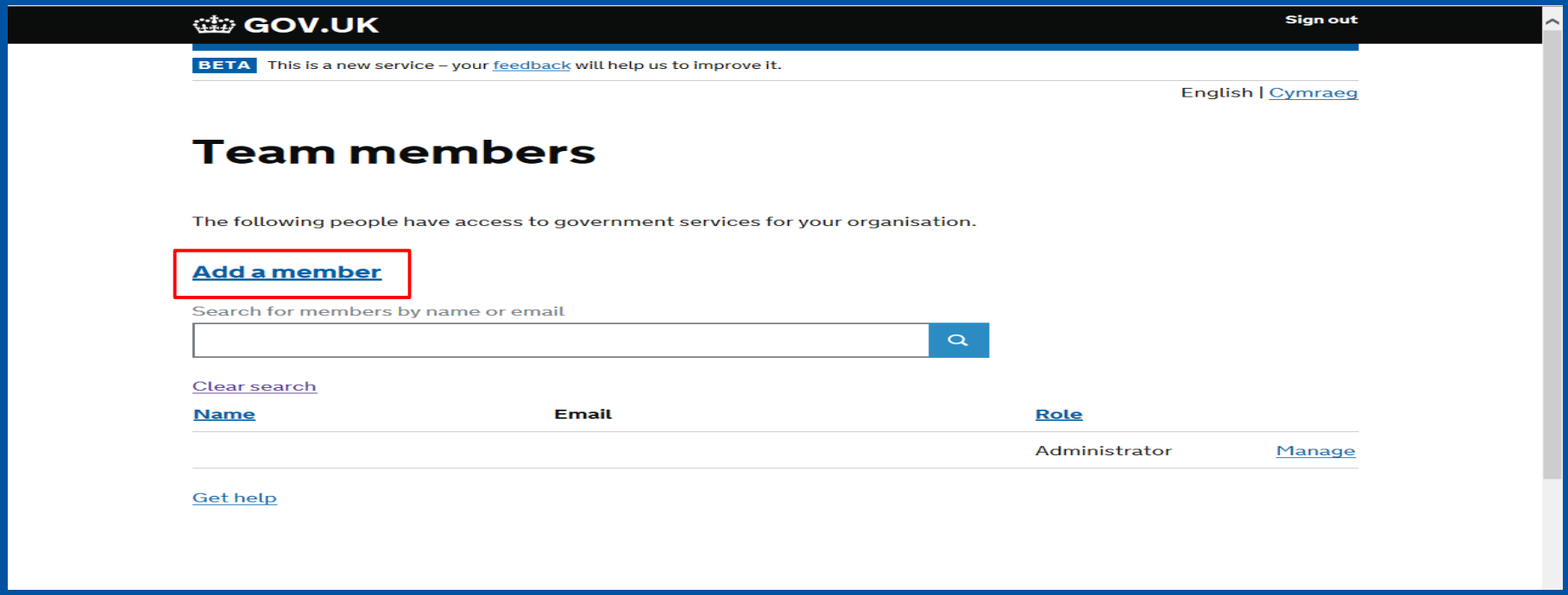
Team Members

You will be directed to the ‘Team members’ screen. From here select ‘Add a member’.



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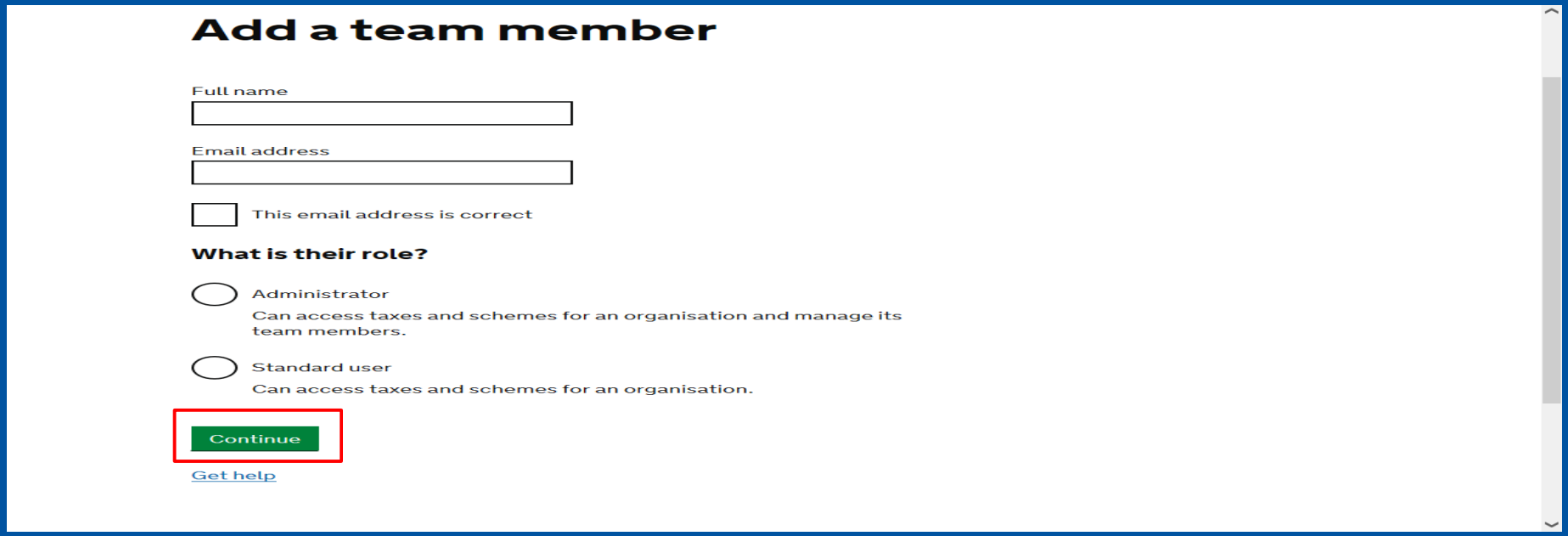
Add a Team Member

You will be directed to the ‘Add a team member’ screen. Fill out the relevant details and select the permissions of either Administrator or Standard user, then select ‘Continue’.



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Confirm Team Member

Select ‘Confirm’ to confirm the new user.

GOV.UK

Sign out

BETA This is a new service – your feedback will help us to improve it.

Back

English | Cymraeg

Confirm you want to add these new team members

Standard user Remove Change

Add another new team member

Confirm

Get help

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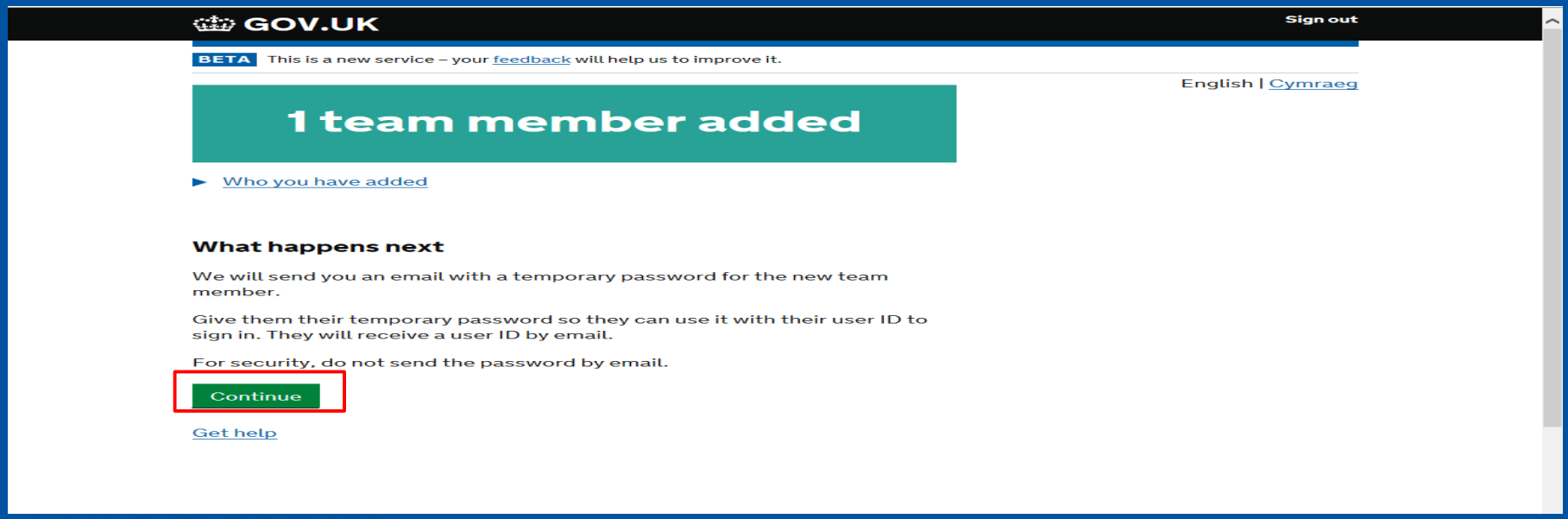
Member Added

You will be directed to a new screen confirming the user has been added. The user will receive an email with their User ID and you will receive a temporary password which they will need to use the first time they log in. Select 'Continue' to be returned to the 'Team members' screen.



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WEFO Website

Advise the new user to navigate to http://gov.wales/funding/eu-funds/wefo-online/ and select the 'WEFO Online' link from the centre of the window.

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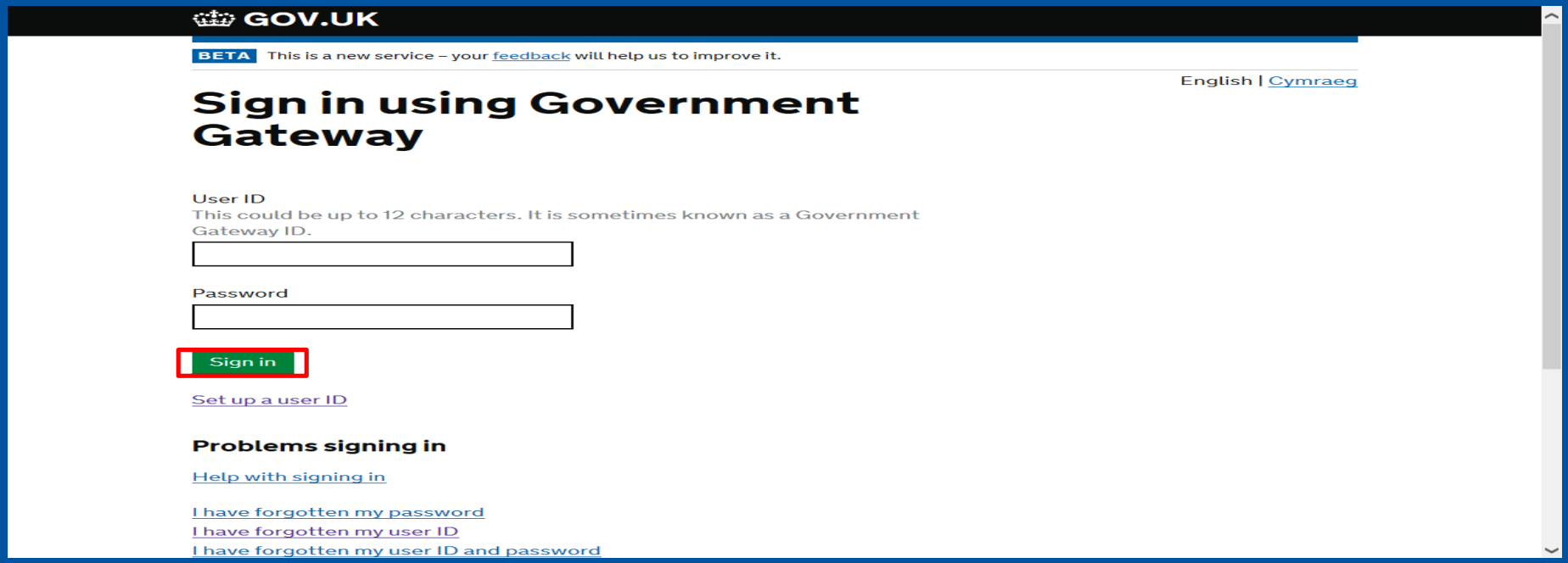
Activate Enrolment

The user will be required to enter their 'User ID' and 'Password' and press 'Sign in'.



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Activate Enrolment

They will receive a confirmation message that additional security checks are being performed.

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Welsh European Funding Office

Cronfeydd yr UE: Buddsoddi yng Nghymru
EU Funds: Investing in Wales

Enrolment Guidance | Cymraeg

Enrolment Successful

Enrolment successful. Additional security checks are being carried out. An email will be sent detailing the progress to the enrolled email address within 2 working days.

Return to WEFO home page

Terms and Conditions Accessibility Statement Help and Guidance Contact Us

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Activate Enrolment

Within 48 hours of receiving this message, they will receive an email stating the security checks are complete and they are now able to Log on to WEFO Online.

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Welsh European Funding Office

Cronfeydd yr UE: Buddsoddi yng Nghymru
EU Funds: Investing in Wales

Enrolment Guidance | Cymraeg

Enrolment Successful

Enrolment successful. Additional security checks are being carried out. An email will be sent detailing the progress to the enrolled email address within 2 working days.

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Deleting a Team Member

To delete a team member, select ‘Manage’ next to the user you wish to delete.

GOV.UK

Sign out

BETA This is a new service – your feedback will help us to improve it.

English | Cymraeg

Team members

The following people have access to government services for your organisation.

Add a member

Search for members by name or email

Clear search

Name	Email	Role	
		Administrator	Manage
		Standard User	Manage

Get help

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Manage Users‘ Government Gateway Details

You will be directed to a screen showing the details of the user. Select ‘Delete members Government Gateway details’.

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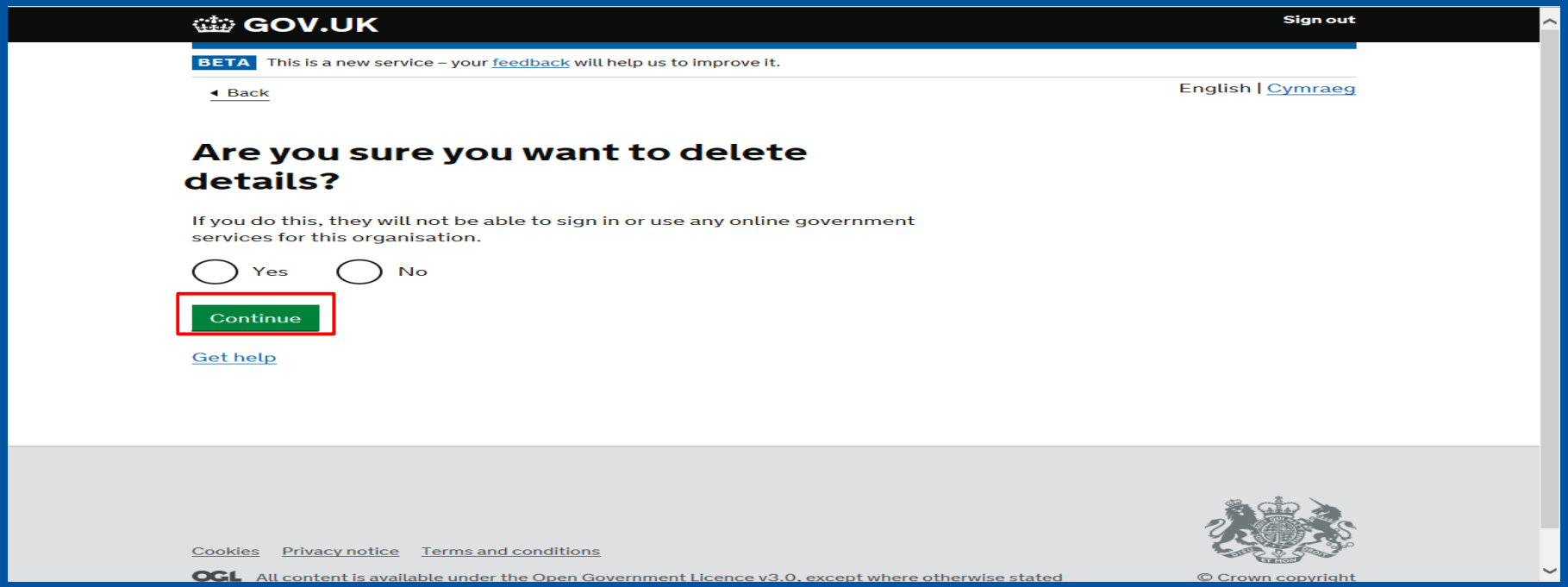
Confirm Deletion

A confirmation message will appear. Select ‘Yes’ and then ‘Continue’ to delete the member.



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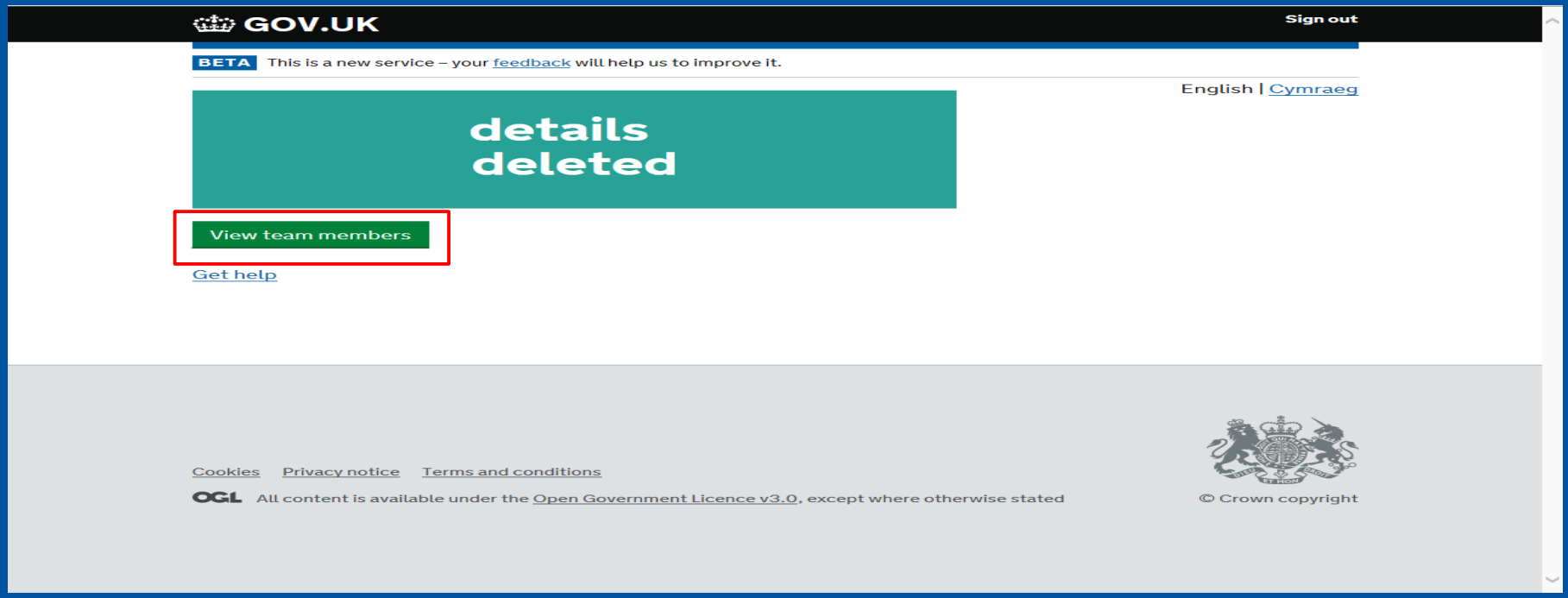
User's Details Deleted

You will be directed to a screen confirming the users deletion. Select 'View team members' to return to the 'Team members' list.



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Team Members

You will be directed to the ‘Team members’ screen and the user will no longer be displayed on the list.

GOV.UK Sign out

BETA This is a new service – your feedback will help us to improve it.

English | Cymraeg

Team members

The following people have access to government services for your organisation.

Add a member

Search for members by name or email

Clear search

Name	Email	Role	
		Administrator	Manage

Get help

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Further Assistance

If you require further assistance with this function please contact either:

Your Project Development Officer

Or

WEFO.PPIMS@gov.wales

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Diolch yn Fawr

Thank You

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