

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.



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.



WEFO Online Overview

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



WEFO Website

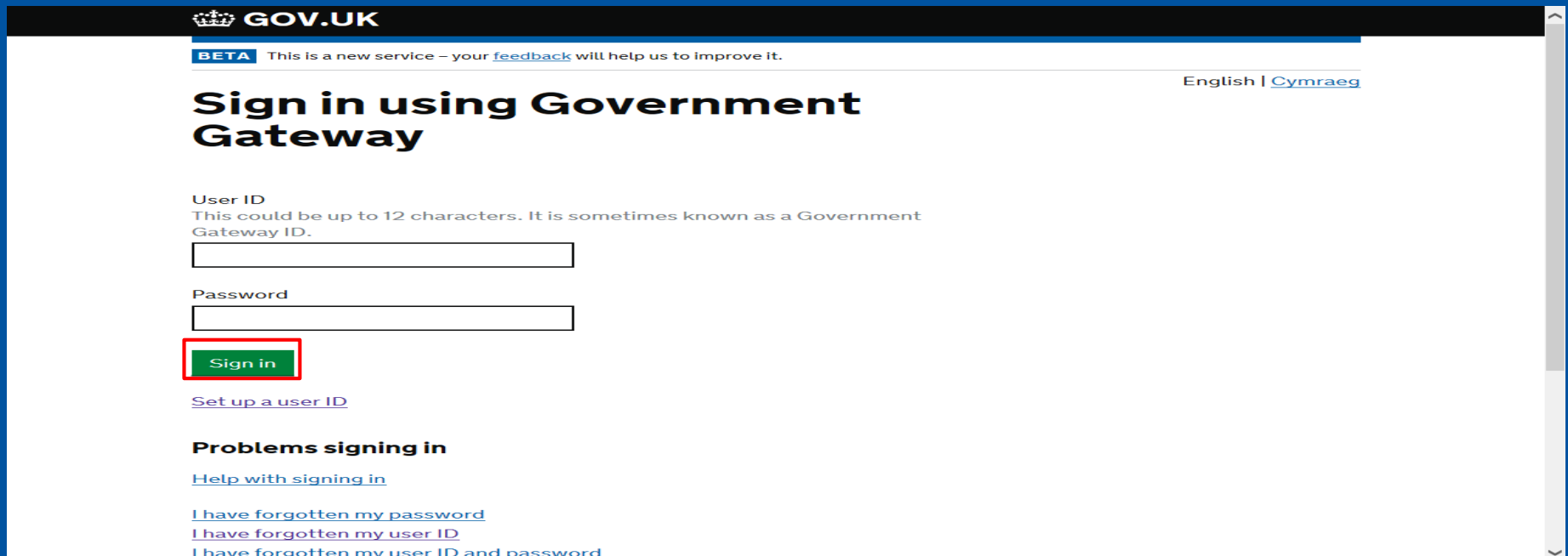
Navigate to <https://gov.wales/log-wefo-online> and select the “Log in to WEFO Online” link from the centre of the window.

The screenshot shows the WEFO Online login page. At the top, there is a yellow banner with the text "BETA You're viewing the new GOV.WALES. [About the new site.](#)" and a "Give feedback" button. Below this is a dark blue header with the Welsh Government logo, the text "Llywodraeth Cymru Welsh Government", a search bar, and the word "Cymraeg". The main content area has a breadcrumb trail: "Home > International and EU > EU funds > Log in to WEFO Online". The title "Log in to WEFO Online" is prominently displayed. Below the title, it says "Log in to WEFO Online to:" followed by a list of bullet points: "submit supporting documents", "view progress and status of applications and claims", "submit a claim", and "update and view information". A green button with the text "Log in to WEFO Online >" is highlighted with a red border. Below this, there are sections for "New users" and "Existing users". The "New users" section states: "If you have not registered with WEFO Online and do not have a Government Gateway account, you will need to contact us by emailing wefo.ppims@gov.wales." The "Existing users" section states: "If you are already registered with WEFO Online and have a Government Gateway account you will need your user ID and password to login."



Government Gateway Login

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



The screenshot shows the Government Gateway login page. At the top, there is a black header with the 'GOV.UK' logo. Below this, a blue banner indicates 'BETA' status and provides a link for feedback. The main heading is 'Sign in using Government Gateway'. To the right, there are links for 'English' and 'Cymraeg'. The login form consists of two input fields: 'User ID' and 'Password'. Below the 'User ID' field, there is a note: 'This could be up to 12 characters. It is sometimes known as a Government Gateway ID.' A green 'Sign in' button is highlighted with a red border. Below the button, there are links for 'Set up a user ID', 'Problems signing in', 'Help with signing in', 'I have forgotten my password', 'I have forgotten my user ID', and 'I have forgotten my user ID and password'.

GOV.UK

BETA This is a new service – your [feedback](#) will help us to improve it.

English | [Cymraeg](#)

Sign in using Government Gateway

User ID
This could be up to 12 characters. It is sometimes known as a Government Gateway ID.

Password

Sign in

[Set up a user ID](#)

Problems signing in

[Help with signing in](#)

[I have forgotten my password](#)


[I have forgotten my user ID](#)

[I have forgotten my user ID and password](#)



Sign In

You will be prompted to enter an access code using the additional security that you set up. Enter the code and then select 'Continue'

Sign out

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English | [Cymraeg](#)

Enter the access code

We have sent a 6 digit access code
It may take a few minutes to arrive


Access Code

☐ Remember me for 7 days

[Problems receiving this code?](#)

Continue

[Get help with this page](#)





WEFO Online

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

WEFO Online
Swyddfa Cyllid Ewropeaidd Cymru
Welsh European Funding Office

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


UNDEB EWROPEAIDD
EUROPEAN UNION


Llywodraeth Cymru
Welsh Government

Welcome Mr Jon Smith | WEFO Online Desk Instructions

Government Gateway Group Management | **Government Gateway Group Management | Cymwys Hysoddi**

Proceed To Case List



Team Members

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

GOV.UK Sign out

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[Return to WEFO Online](#)

English | [Cymraeg](#)

Government Gateway
Team members

[Add a team member](#)

Administrator	Manage
Showing 1-1 of 1 team members	

[Get help with this page](#)

[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)



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'.

Add a team member

Full name

Email address

What is their role?

☐

Administrator

Can access services for an organisation and manage its team members.

☐

Standard user

Can access services for an organisation.


Continue

[Get help with this page](#)



Confirm Team Member

Select 'Confirm' to confirm the new user.

 Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

English | [Cymraeg](#)

[Back](#)

Confirm you want to add this team member


[Standard user](#) [Remove](#) [Change](#)

[Add another new team member](#)

[Confirm](#)

[Get help with this page](#)

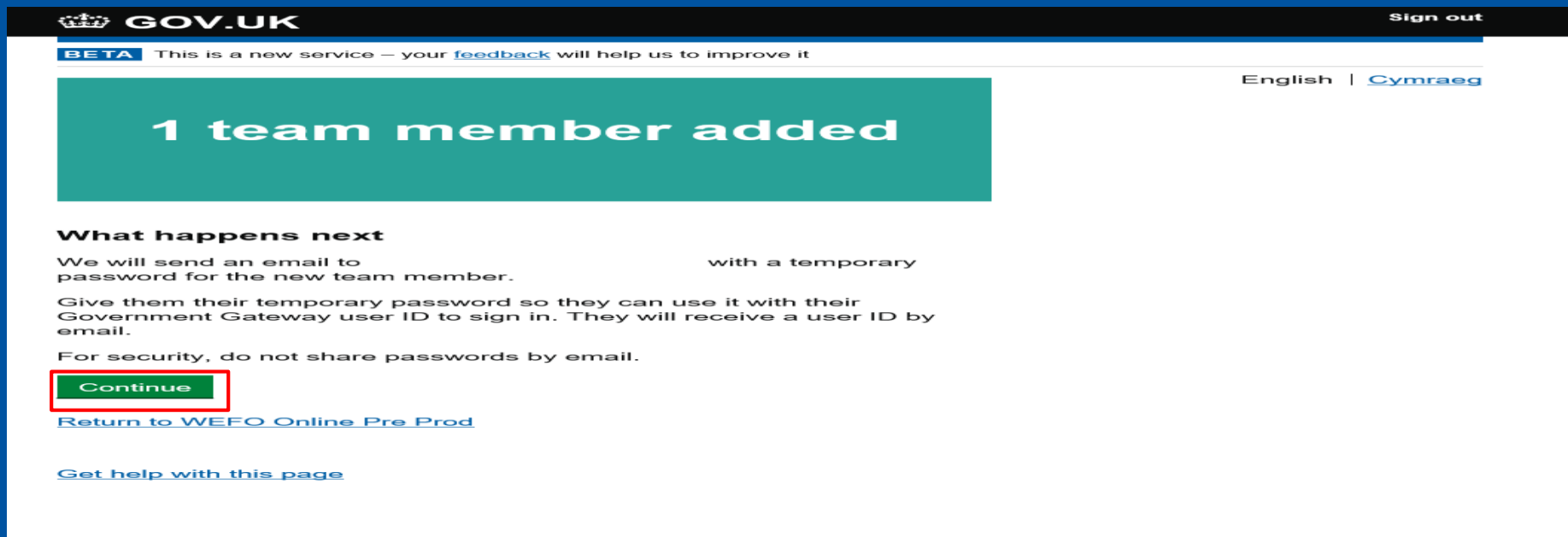
[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)





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.



The screenshot shows the GOV.UK website interface. At the top, the GOV.UK logo is on the left, and a 'Sign out' link is on the right. Below the logo, a 'BETA' banner states: 'This is a new service – your [feedback](#) will help us to improve it'. In the top right corner, there are links for 'English' and 'Cymraeg'. The main content area features a large green box with the text '1 team member added'. Below this, a section titled 'What happens next' explains the process: 'We will send an email to [redacted] with a temporary password for the new team member. Give them their temporary password so they can use it with their Government Gateway user ID to sign in. They will receive a user ID by email. For security, do not share passwords by email.' A green 'Continue' button is highlighted with a red border. At the bottom, there are two links: 'Return to WEFO Online Pre Prod' and 'Get help with this page'.

GOV.UK Sign out

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English | [Cymraeg](#)

1 team member added

What happens next

We will send an email to [redacted] with a temporary password for the new team member.

Give them their temporary password so they can use it with their Government Gateway user ID to sign in. They will receive a user ID by email.

For security, do not share passwords by email.

[Continue](#)

[Return to WEFO Online Pre Prod](#)

[Get help with this page](#)



WEFO Website

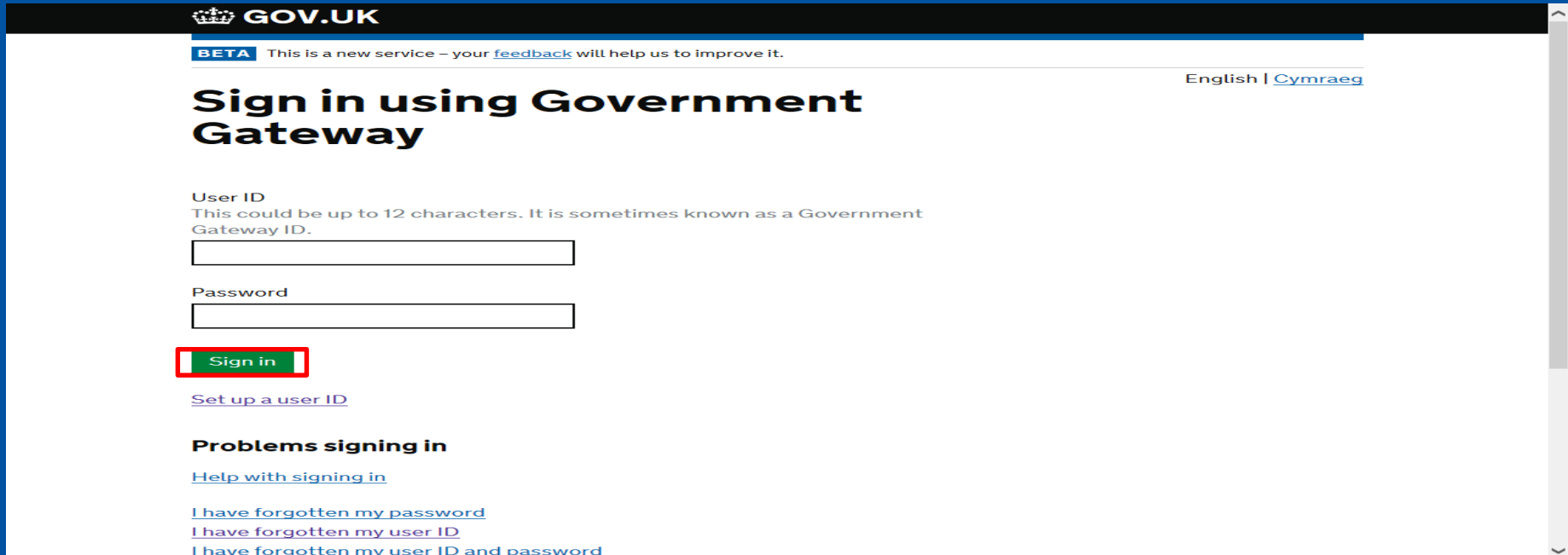
Advise the new user to navigate to <https://gov.wales/log-wefo-online> and select the 'Log in to WEFO Online' link from the centre of the window.

The screenshot shows the WEFO Online login page. At the top, a yellow banner contains the text "BETA You're viewing the new GOV.WALES. [About the new site.](#)" and a "Give feedback" button. Below this is a dark grey header with the Welsh Government logo, the text "Llywodraeth Cymru Welsh Government", a search bar, and the word "Cymraeg". The main content area has a breadcrumb trail: "Home > International and EU > EU funds > Log in to WEFO Online". Under the heading "GUIDANCE", the title "Log in to WEFO Online" is displayed. Below this, it says "Log in to WEFO Online to:" followed by a list of bullet points: "submit supporting documents", "view progress and status of applications and claims", "submit a claim", and "update and view information". A green button with the text "Log in to WEFO Online >" is highlighted with a red rectangle. Below the button, there are sections for "New users" and "Existing users". The "New users" section states: "If you have not registered with WEFO Online and do not have a Government Gateway account, you will need to contact us by emailing wefo.ppims@gov.wales." The "Existing users" section states: "If you are already registered with WEFO Online and have a Government Gateway account you will need your user ID and password to login."



Activate Enrolment

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



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English | [Cymraeg](#)

Sign in using Government Gateway

User ID
This could be up to 12 characters. It is sometimes known as a Government Gateway ID.

Password

Sign in

[Set up a user ID](#)

Problems signing in

[Help with signing in](#)

[I have forgotten my password](#)

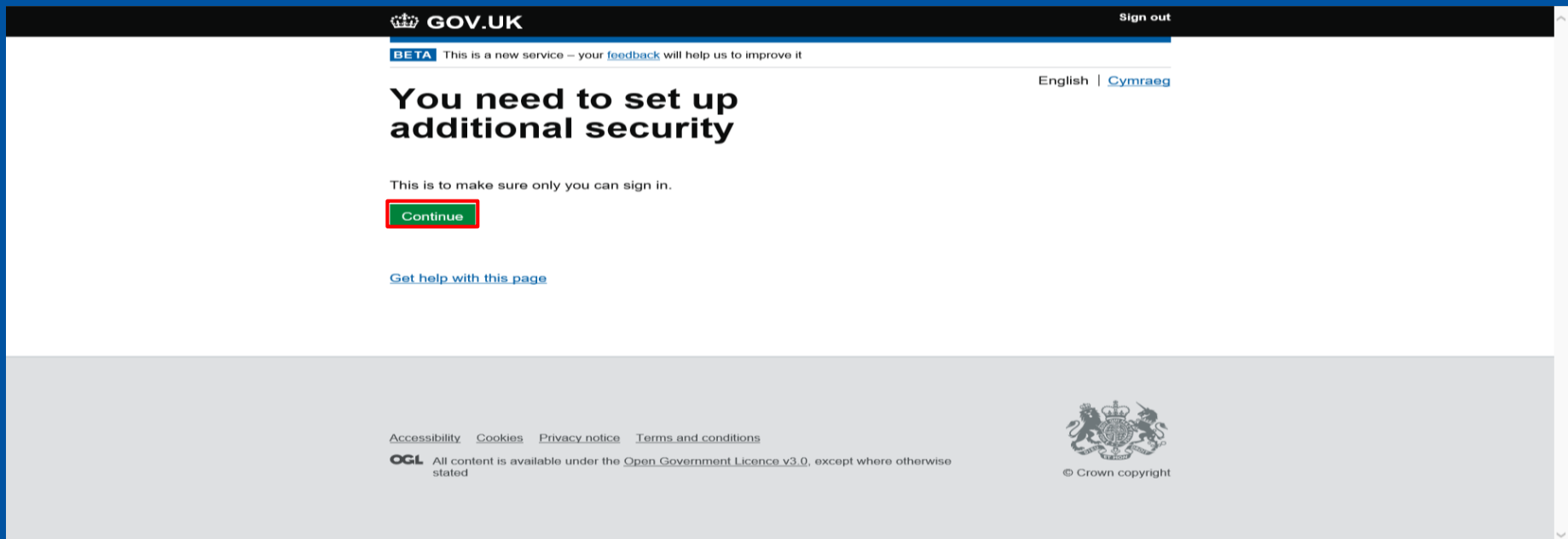
[I have forgotten my user ID](#)

[I have forgotten my user ID and password](#)



Additional Security (Part 1)

You will be asked to set up additional security to your account. Select 'Continue' to select your additional security.



The screenshot shows the GOV.UK website with a black header bar containing the GOV.UK logo and a 'Sign out' link. Below the header, a blue banner reads 'BETA This is a new service – your [feedback](#) will help us to improve it'. The main heading is 'You need to set up additional security'. Below this, it says 'This is to make sure only you can sign in.' and features a green 'Continue' button with a red border. A link 'Get help with this page' is below the button. The footer includes links for 'Accessibility', 'Cookies', 'Privacy notice', and 'Terms and conditions', followed by the OGL logo and text: 'All content is available under the [Open Government Licence v3.0](#), except where otherwise stated'. The Royal Coat of Arms and '© Crown copyright' are also present.

GOV.UK Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

English | [Cymraeg](#)

You need to set up additional security


This is to make sure only you can sign in.

[Continue](#)

[Get help with this page](#)

[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)

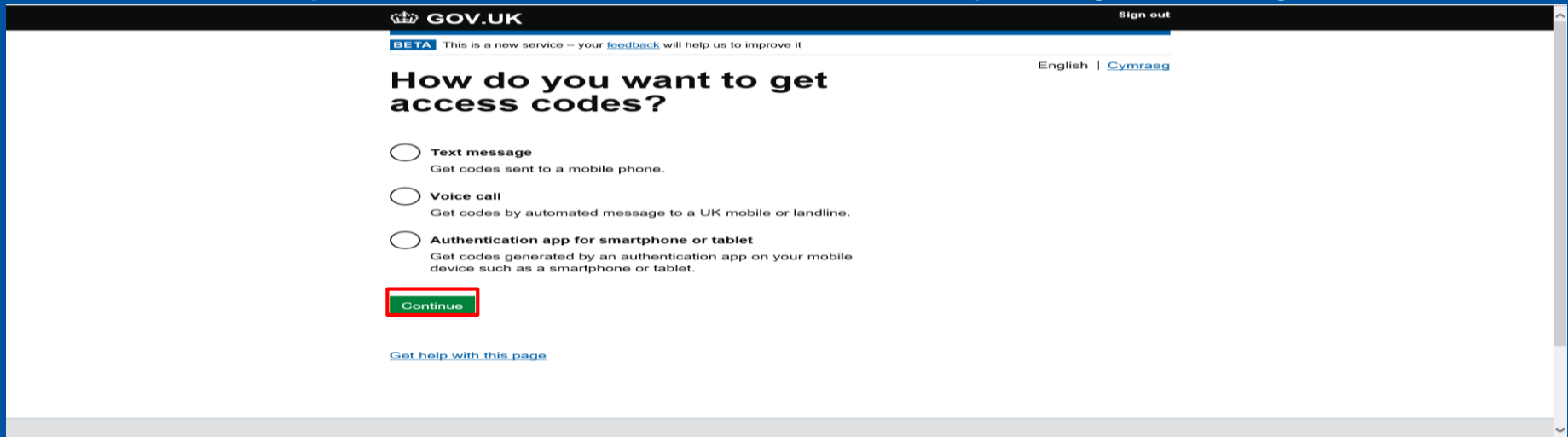
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Additional Security (Part 2)

You will have the choice of three different additional security methods; Text, Voice call or Authentication App. Please note that if you are based outside of the UK, you will need to use the Authentication app option. Select one of the options and then select 'Continue'. The next slides will show how to use each option. Once you have set up an additional security, navigate to page 29.

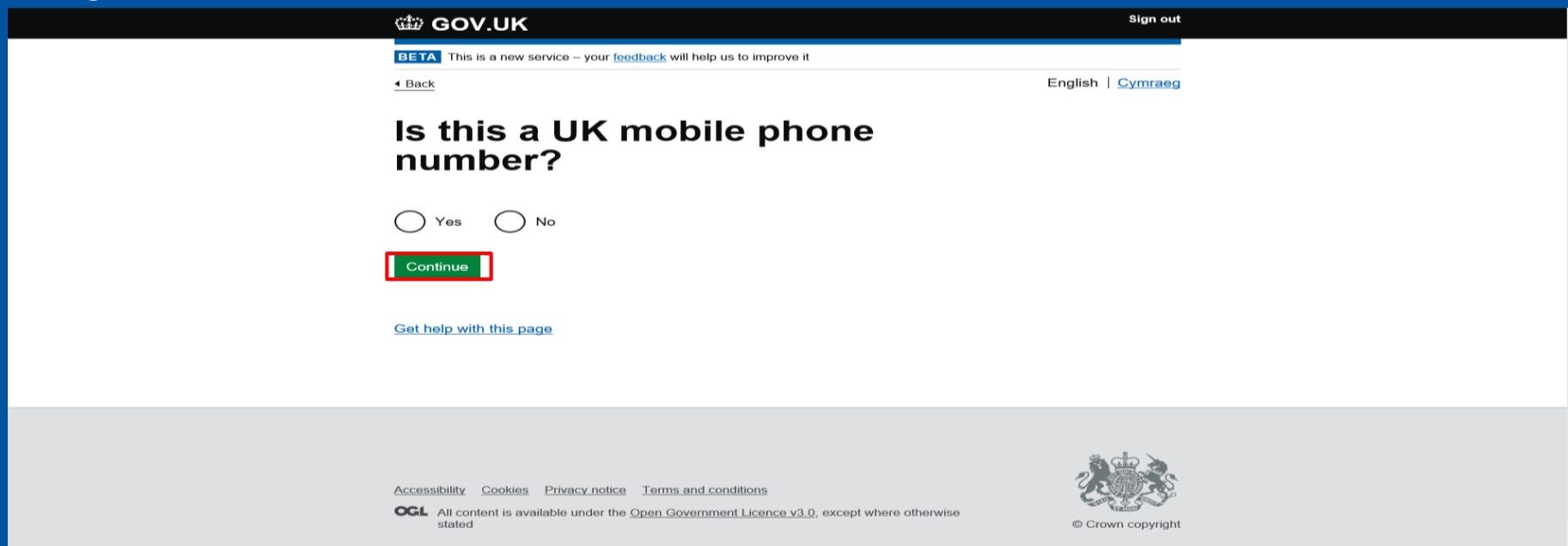


The screenshot shows the GOV.UK website interface. At the top, there is a 'Sign out' link. Below the header, a 'BETA' banner states: 'This is a new service — your [feedback](#) will help us to improve it'. The main heading is 'How do you want to get access codes?'. Below this, there are three radio button options: 'Text message' (with subtext 'Get codes sent to a mobile phone.'), 'Voice call' (with subtext 'Get codes by automated message to a UK mobile or landline.'), and 'Authentication app for smartphone or tablet' (with subtext 'Get codes generated by an authentication app on your mobile device such as a smartphone or tablet.'). A red rectangular box highlights the 'Continue' button at the bottom of the options. A link 'Get help with this page' is located at the bottom left of the form area.



Additional Security (Text Part 1)

When you first select the text option. You will need to verify if you are using a UK mobile phone number. Confirm that you are using one, then select 'Continue'.



GOV.UK Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) English [Cymraeg](#)

Is this a UK mobile phone number?

☐ Yes ☐ No

Continue

[Get help with this page](#)

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Additional Security (Text Part 2)

You will be prompted to provide a number. Enter your mobile number then select 'Send access code'.

 Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) English | [Cymraeg](#)

Enter a UK mobile phone number


We will send an access code to this mobile phone by text message.

UK mobile phone number

[Choose a different way to get access codes](#)

Send access code

[Get help with this page](#)




[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)



Additional Security (Text Part 3)

You will receive a six digit code via text. Enter the code and then select 'Continue'.

 Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) English | [Cymraeg](#)

Enter the access code


We have sent a 6 digit access code to
It may take a few minutes to arrive

Access Code

Problems with this code? [Try another option](#)

Continue

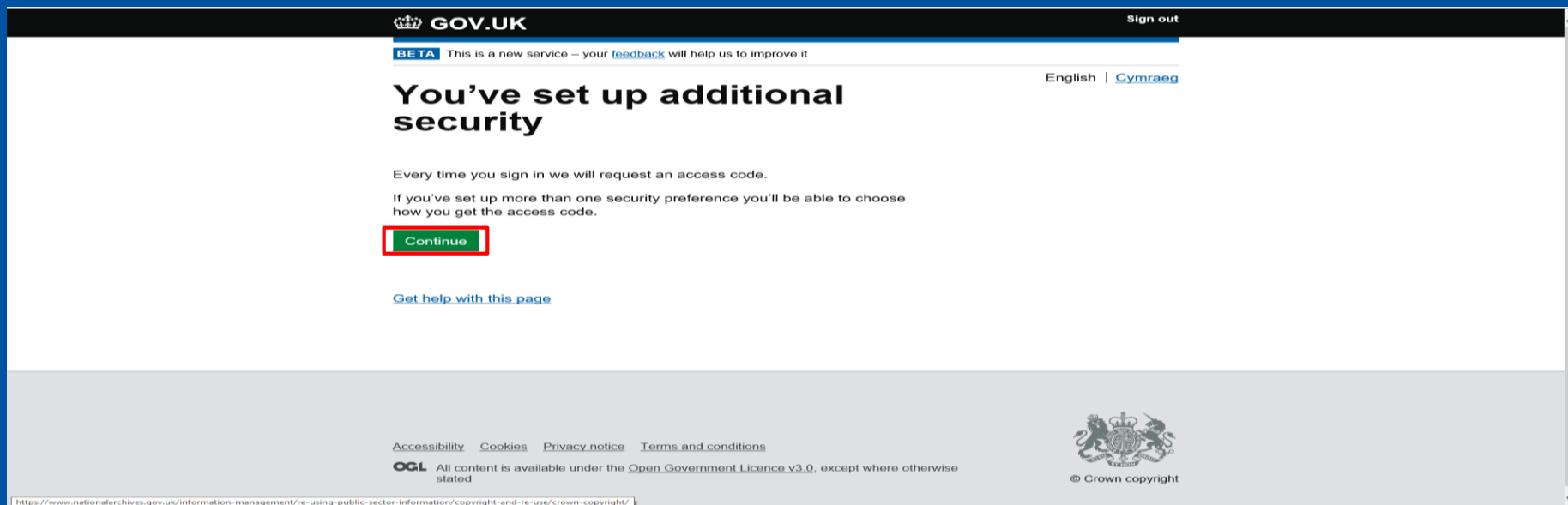
[Get help with this page](#)


[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)



Additional Security (Text Part 4)

You will then be re-directed to the confirmation screen. Select 'Continue' to navigate to the Enrolment screen.



Additional Security (Voice call Part 1)

With the Voice call option, you will be asked to provide a UK phone number. Enter the number, then select 'Call me'.

GOV.UK Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) English | [Cymraeg](#)

Enter a UK phone number

We will call this number and read out an access code - you will need to make a note of it.

UK phone number

[Choose a different way to get access codes](#)

Call me


[Get help with this page](#)

[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)



Additional Security (Voice call Part 2)

You should receive a phone call within a few minutes of requesting. Once you have to code, enter it in the 'Access Code' field and then select 'Continue'.

 [Sign out](#)

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) [English](#) | [Cymraeg](#)

Enter the access code


We are calling with a 6 digit access code.
This may take a few minutes.

Access Code

Problems with this code? [Try another option](#)

Continue

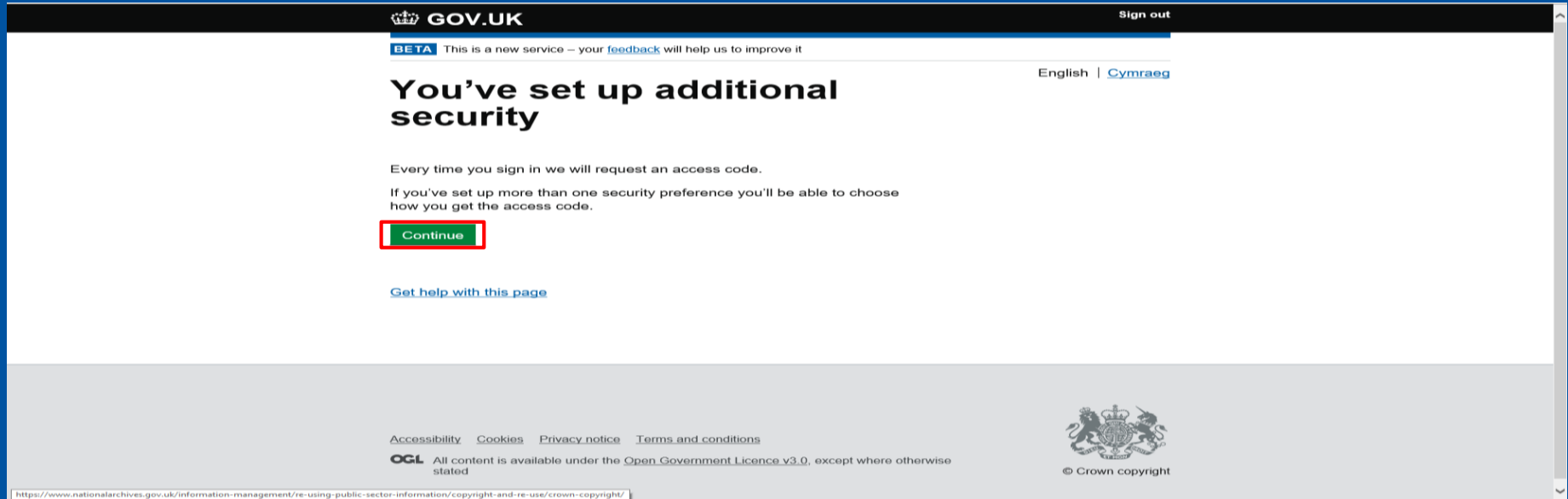
[Get help with this page](#)


[Accessibility](#) [Cookies](#) [Privacy policy](#) [Terms and conditions](#)



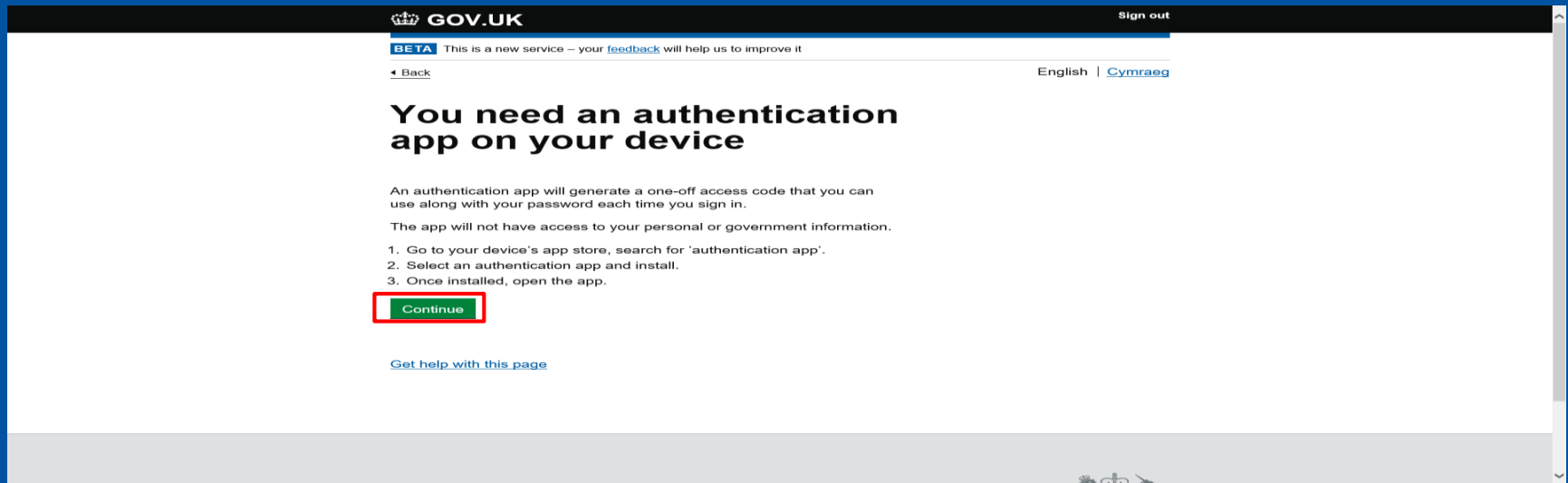
Additional Security (Voice call Part 3)

You will then be re-directed to the confirmation screen. Select 'Continue' to navigate to the Enrolment screen.




Additional Security (Authentication App Part 1)

With the Authentication App option, the app will generate a code for you each time you need to log in. You can find various Authentication Apps by searching in the App Store of your mobile phone. Once done you will need to link the app to your Government Gateway account. Select 'Continue' to do so.



Additional Security (Authentication App Part 2)

You will be asked to set up your authentication app. You can do this by either scanning the QR Code, or manually entering the Secret key into your phone. Once you have done this, Select 'Continue'.


Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#)English | [Cymraeg](#)

Set up your authentication app

Use your authentication app to scan the QR code below or manually enter the secret key into your authentication app.



Secret key: **GAZG KM3C GM4W ELLD GEZD OLJU MY4D ILLB MRRW
ILLG MJSW KZBU MY4T CNZR GE**

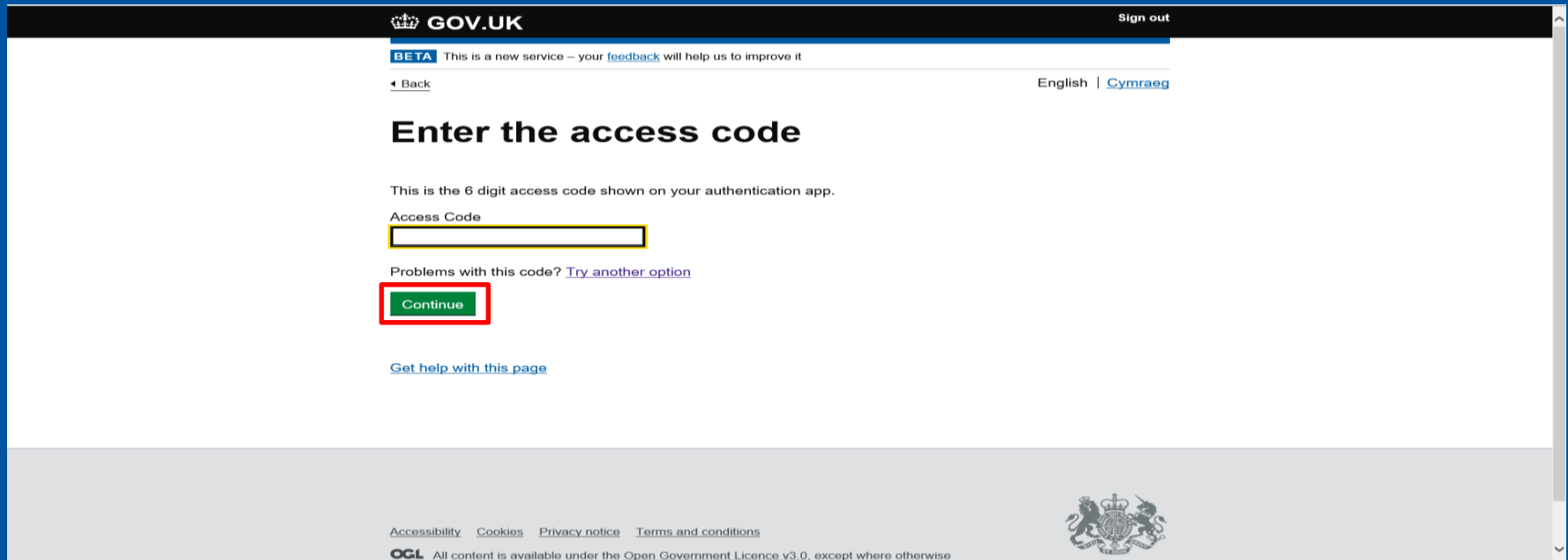
Continue

[Get help with this page](#)



Additional Security (Authentication App Part 3)

Your access code will then be displayed on your mobile phone. Enter the access code and then select 'Continue'.



The screenshot shows the GOV.UK website interface for the authentication app. At the top, the GOV.UK logo and a 'Sign out' link are visible. Below the header, a 'BETA' badge and a message about feedback are present. A 'Back' link is on the left, and 'English | Cymraeg' language options are on the right. The main heading is 'Enter the access code'. Below this, a message states: 'This is the 6 digit access code shown on your authentication app.' There is a text input field labeled 'Access Code'. Below the field, a link says 'Problems with this code? Try another option'. A green 'Continue' button is highlighted with a red rectangle. At the bottom of the main content area, there is a link 'Get help with this page'. The footer contains links for 'Accessibility', 'Cookies', 'Privacy notice', and 'Terms and conditions', followed by the OGL logo and the text 'All content is available under the Open Government Licence v3.0, except where otherwise stated'. The Royal Coat of Arms is also visible in the footer.

GOV.UK Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) English | [Cymraeg](#)

Enter the access code

This is the 6 digit access code shown on your authentication app.

Access Code

Problems with this code? [Try another option](#)

[Continue](#)

[Get help with this page](#)


[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)

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Additional Security (Authentication App Part 4)

When you use an Authentication App for the first time, you will be asked to provide a name for the app. Enter a name and then select 'Continue'.

 [Sign out](#)

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English | [Cymraeg](#)

Create a name for your authentication app


Use a name that will help you remember the app when you next sign in.


App name

[Continue](#)

[Get help with this page](#)

[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)

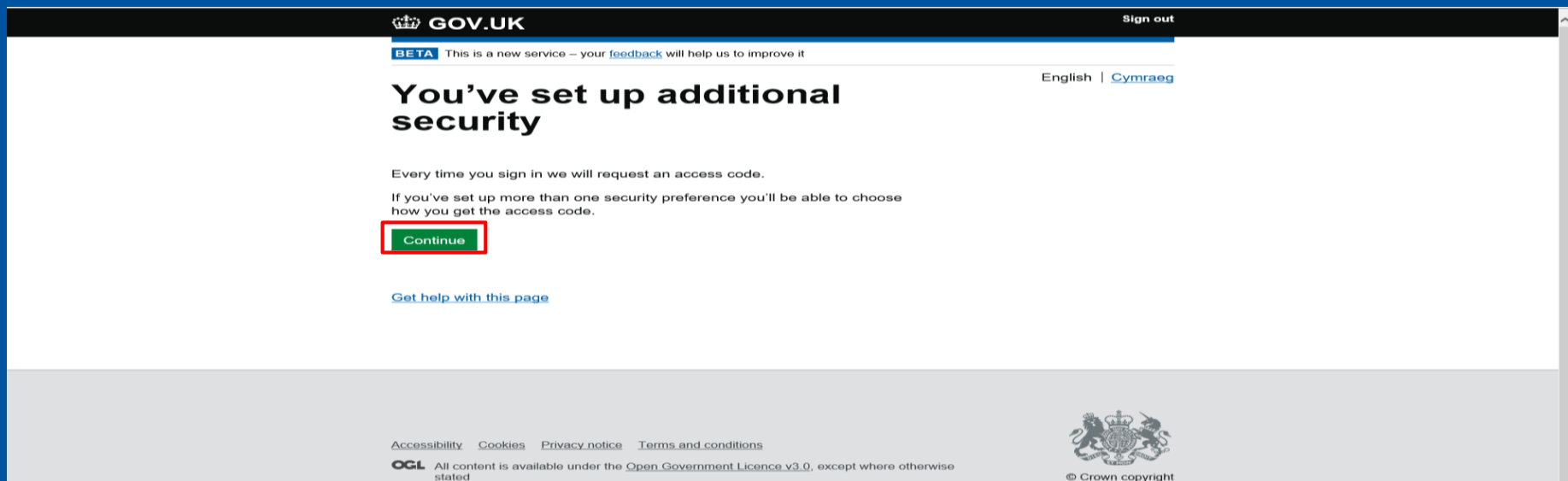
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Additional Security (Authentication App Part 5)

You will then be re-directed to the confirmation screen. Select 'Continue' to navigate to the Enrolment screen.



Create New Password

The new user will be prompted to enter a new password. Enter a new password and then Select 'Continue'.

GOV.UK

Sign out

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English | [Cymraeg](#)

Create a new password

Current password

Your password must:

- be between 8 and 12 characters
- have at least one number (0 to 9)
- have at least one letter
- not contain special characters

Enter new password

Confirm new password


[Continue](#)

[Get help with this page](#)



Setting up a Recovery Word (Part 1)

Next, you will be asked to create a recovery word. This will be used if you ever forget your password.



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English | [Cymraeg](#)

Set up recovery for your sign in details


You need to set up a recovery word so that you can get back into Government Gateway if you forget your password.

[Continue](#)

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Setting up a Recovery Word (Part 2)

Enter a word that applies to the parameters on the screen, then select 'Continue'.



BETA

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[◀ Back](#)[English](#) | [Cymraeg](#)

Set up a recovery word

Make a note of this word in case you need it in the future.

The word must:

- be between 6 and 12 characters
- not contain spaces or special characters
- not contain numbers

Recovery word

Continue

[Get help with this page](#)





Activate Enrolment

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

WEFO Online
Swyddfa Cyllid Ewropeaidd Cymru
Welsh European Funding Office

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


UNDEB EWROPEAIDD
EUROPEAN UNION


Llywodraeth Cymru
Welsh Government

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](#)





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.

WEFO Online
Swyddfa Cyllid Ewropeaidd Cymru
Welsh European Funding Office

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


UNDEB EWROPEAIDD
EUROPEAN UNION


Llywodraeth Cymru
Welsh Government

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](#)



Deleting a Team Member

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

 [Sign out](#)

BETA This is a new service – your [feedback](#) will help us to improve it

[English](#) | [Cymraeg](#)

[Return to WEFO Online Pre Prod](#)

Government Gateway
Team members

[Add a team member](#)

Standard User	Manage
Administrator	Manage

Showing 1-2 of 2 team members

[Get help with this page](#)



Manage Users' Government Gateway Details

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

Manage Government Gateway details

Full name

Email address

Role

Standard user - Can access services for an organisation.

Security preferences

Not set

Added on: 28 October 2019

Last signed in: - 28 October 2019

Actions

[Reset password](#)

[Resend Government Gateway user ID](#)


[Delete Government Gateway user ID](#)

[Get help with this page](#)



Confirm Deletion

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

 Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

[Back](#) English | [Cymraeg](#)

Are you sure you want to delete user ID?

This will mean they cannot sign into any online government services for this organisation.

All information connected to this user ID will be deleted and cannot be recovered.

☐ Yes, delete user ID

☐ No, do not delete user ID


[Confirm](#)

[Get help with this page](#)



User's Details Deleted

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

 Sign out

BETA This is a new service – your [feedback](#) will help us to improve it

English | [Cymraeg](#)


User ID details deleted for:

[Continue](#)

[Return to WEFO Online](#)

[Get help with this page](#)


[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)





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](#)

[Return to WEFO Online](#)

Government Gateway

Team members


[Add a team member](#)

Administrator [Manage](#)

Showing 1-1 of 1 team members

[Get help with this page](#)

[Accessibility](#) [Cookies](#) [Privacy notice](#) [Terms and conditions](#)





Further Assistance

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

Your Project Development Officer

Or

WEFO.PPIMS@gov.wales



Diolch yn Fawr

Thank You

