CWG PLC

UCP
UNIFIED
cooperative platform

User Guide for Cooperatives

Version	Author	Date	Reviewed By	Date	Comment	Approved By	Approval Date
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1. Introduction

This documentation is a guide prepared for users (Cooperatives) of the Unified Cooperative Platform (UCP). It illustrates frequently used functionalities of the Platform.

The Unified Cooperative Platform (UCP) is a collaborative effort between the National Cooperative Financing Agency Limited (CFAN) and CWG PLC to provide a standardized cooperative technologically driven platform that would meet the operational needs of cooperative societies in Nigeria.

The innovation serves as a one stop shop for all technology needs of cooperative societies, it solves issues of accountability, productivity, monitoring and reporting needs of every cooperative society and connect them to the apex body for purpose of ascertaining their contributions to the overall growth of the economy so as to enable government and development partners understand the level of support they should extend to co-operative activities in Nigeria.

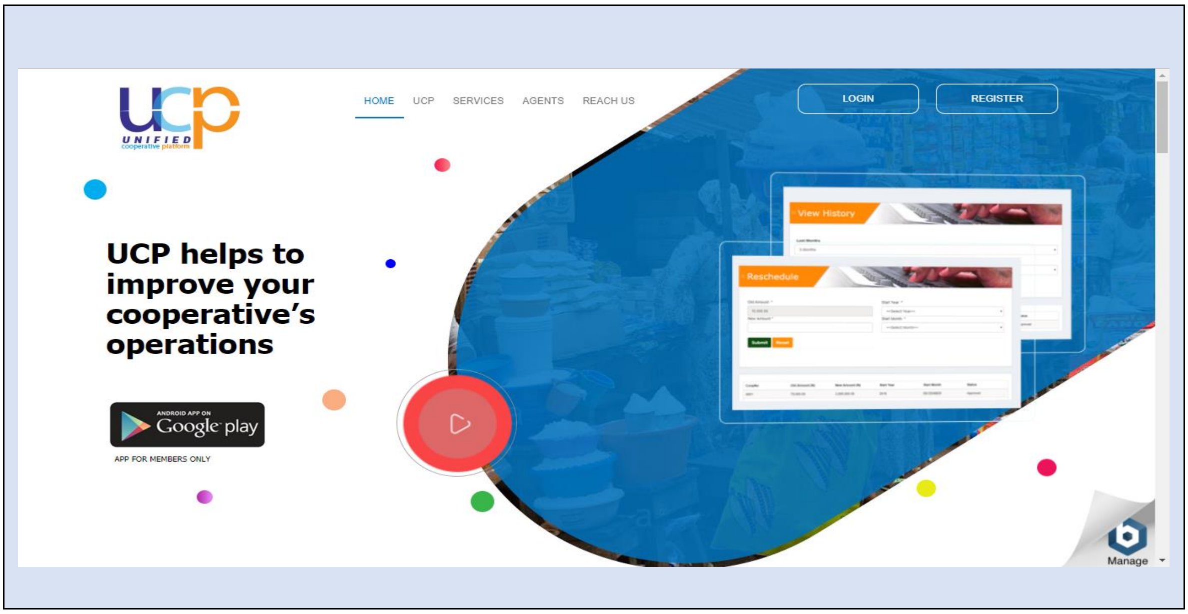
The solution offers a robust co-operative platform that supports financial services and collaboration between the various State Co-operative Financing Agencies and the apex body – National Co-operative Financing Agency of Nigeria (CFAN). It enjoys the expertise of CWG PLC, the largest IT services Company in Nigeria, which has years of experience in building a shared IT platform that solves the challenges of automation and integration faced by Micro Finance Institutions (MFI) like co-operatives.

2. Home Page

1. The UCP Home Page can be accessed using the below URL:

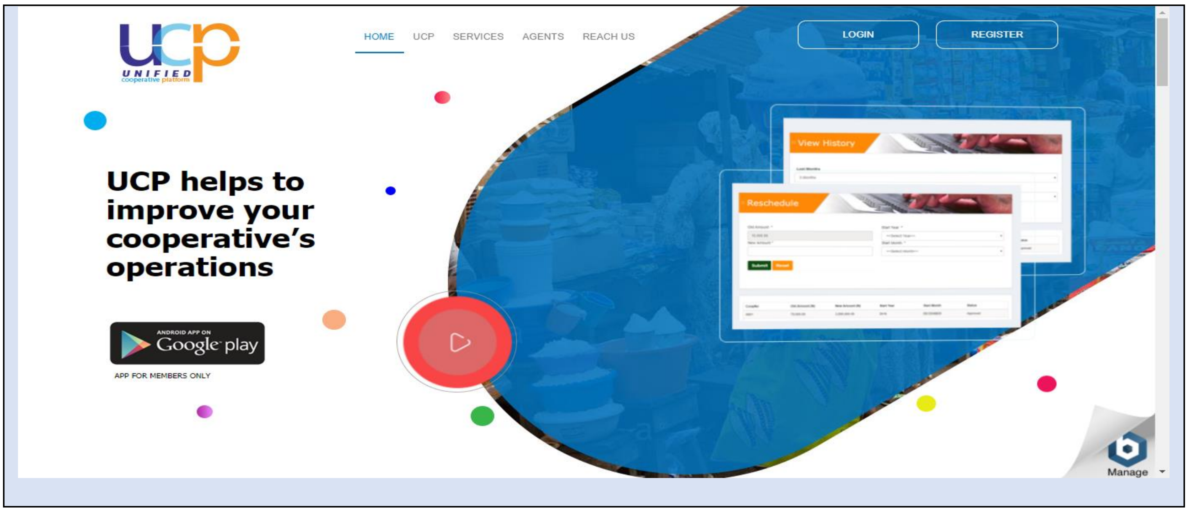
http://54.172.167.61/

2. The Home page is displayed:

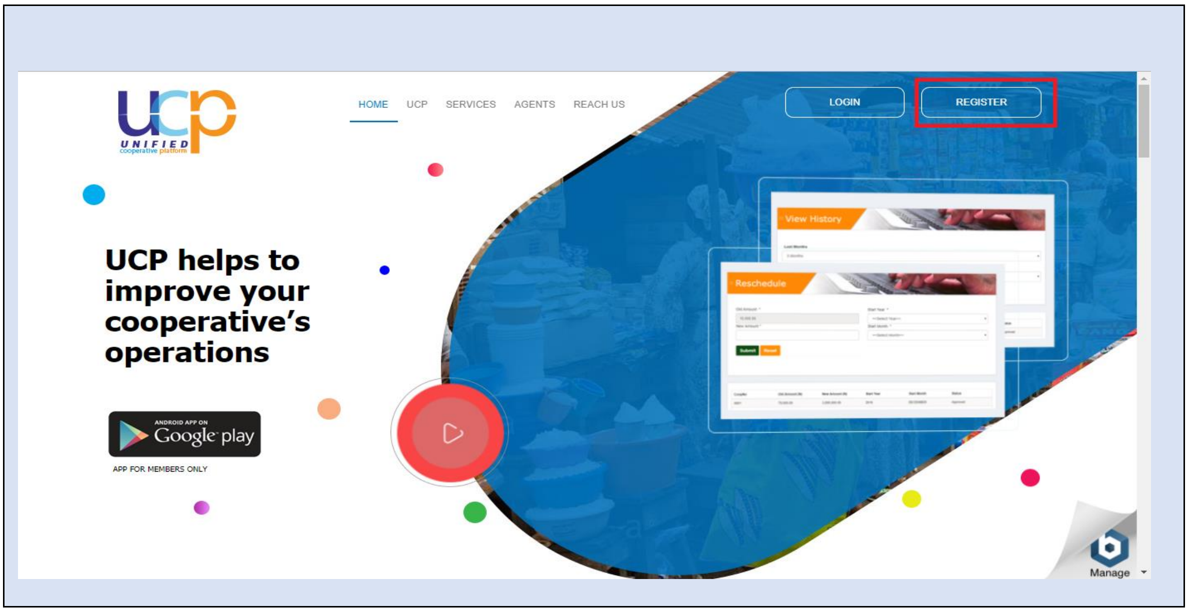


3. Cooperative Registration

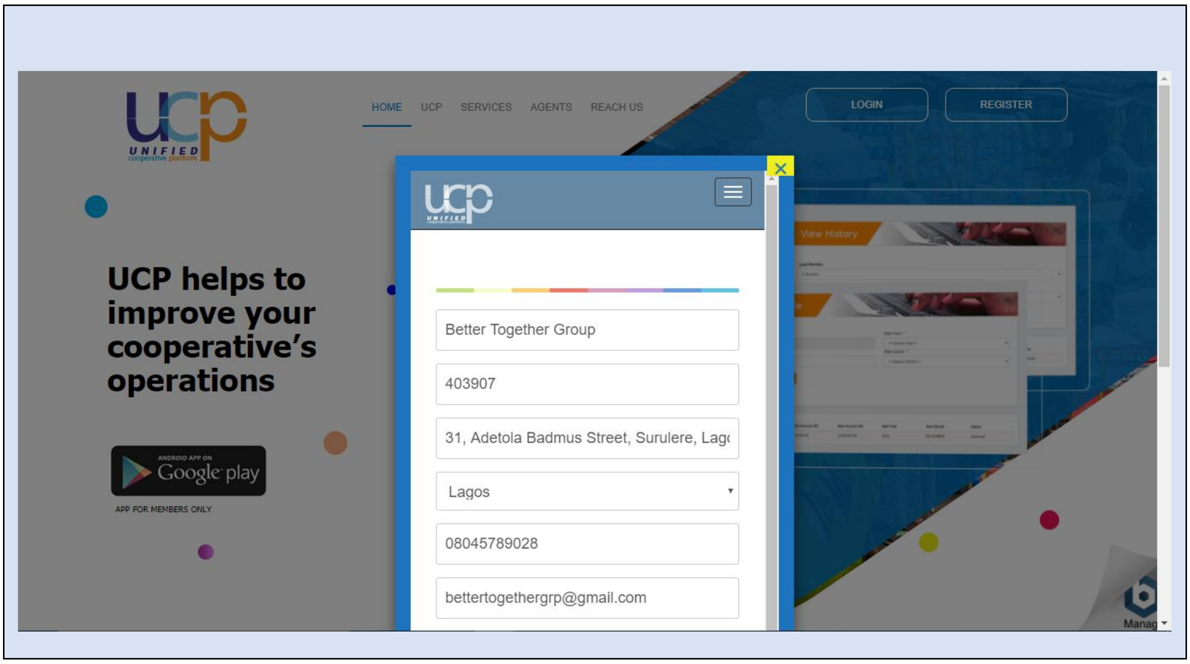
1. Access the UCP Home Page:



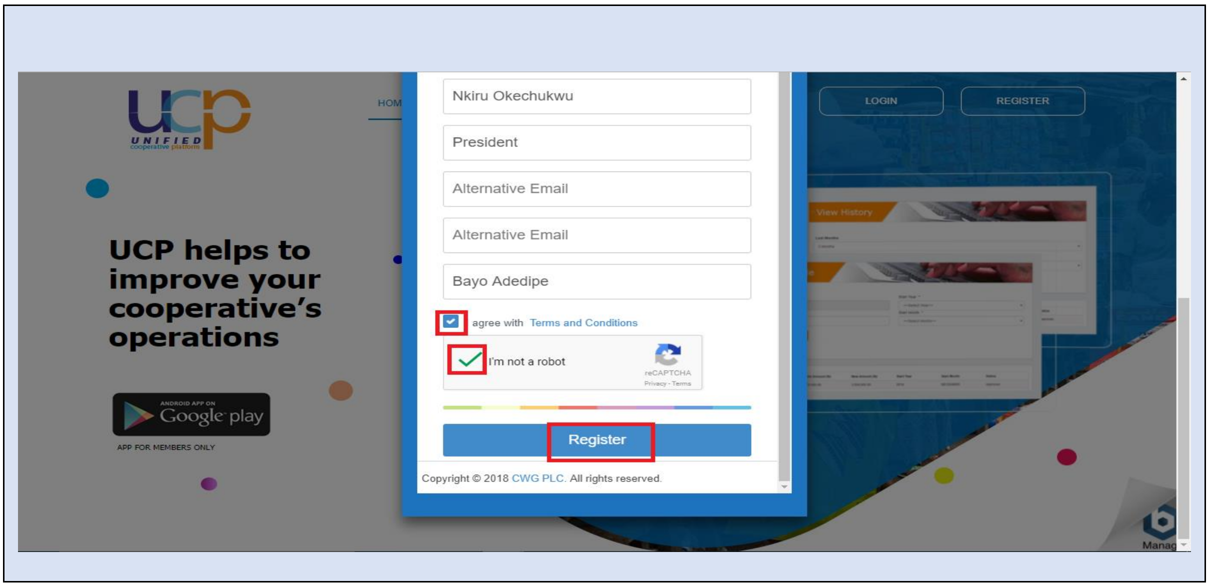
2. Click on the **Register** button:



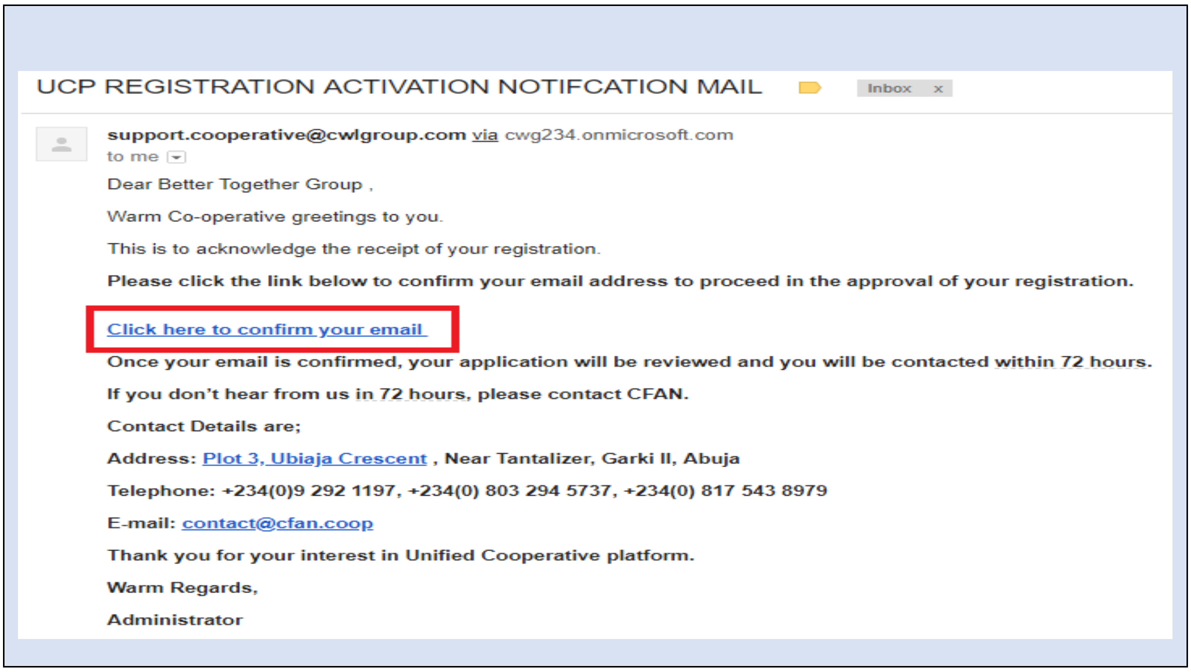
3. The Registration form is displayed. Provide the required registration information:



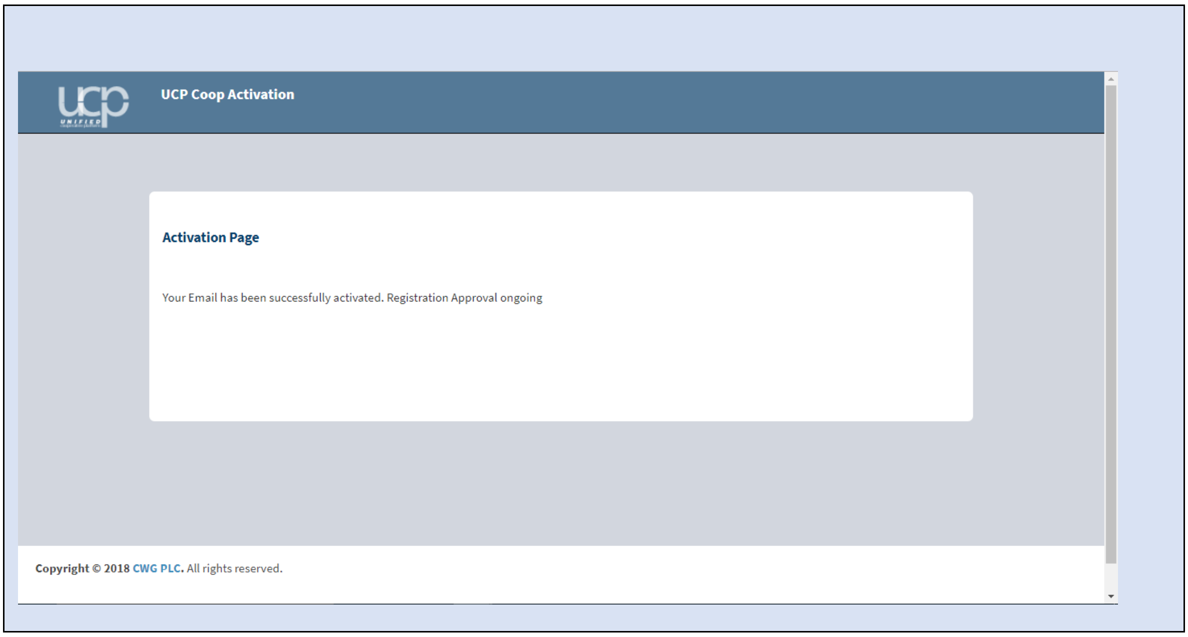
4. Check the Terms and Conditions and Recaptcha boxes. Then click on the **Register** button to register:



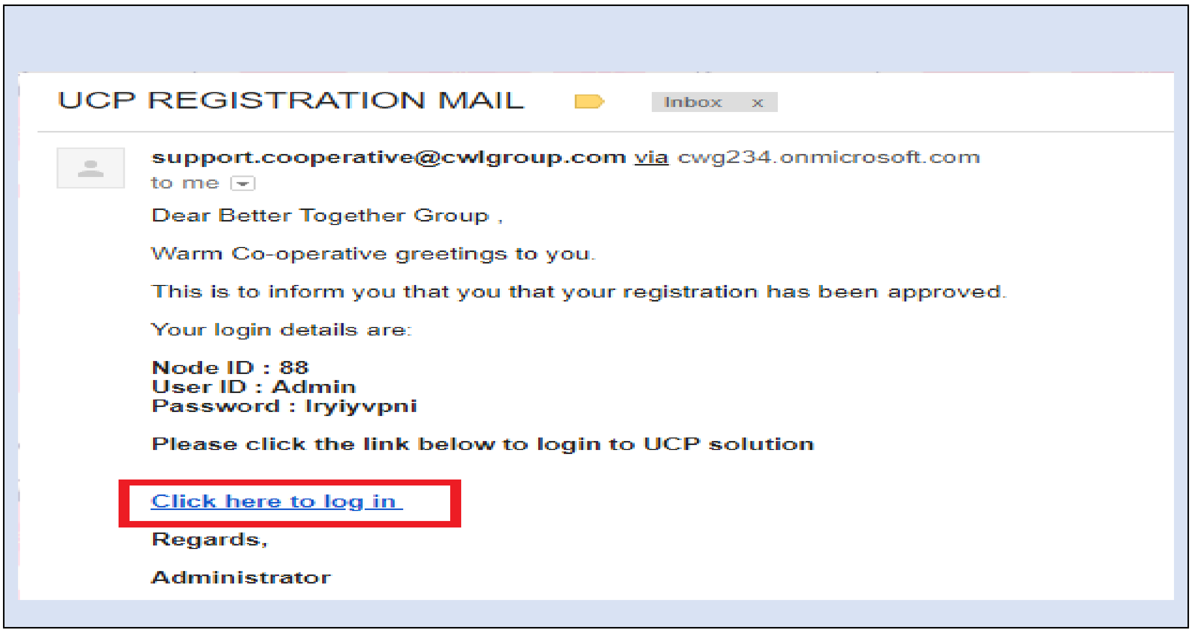
5. Click on the **Confirmation** Link sent to the email address provided:



6. The Email address is confirmed:



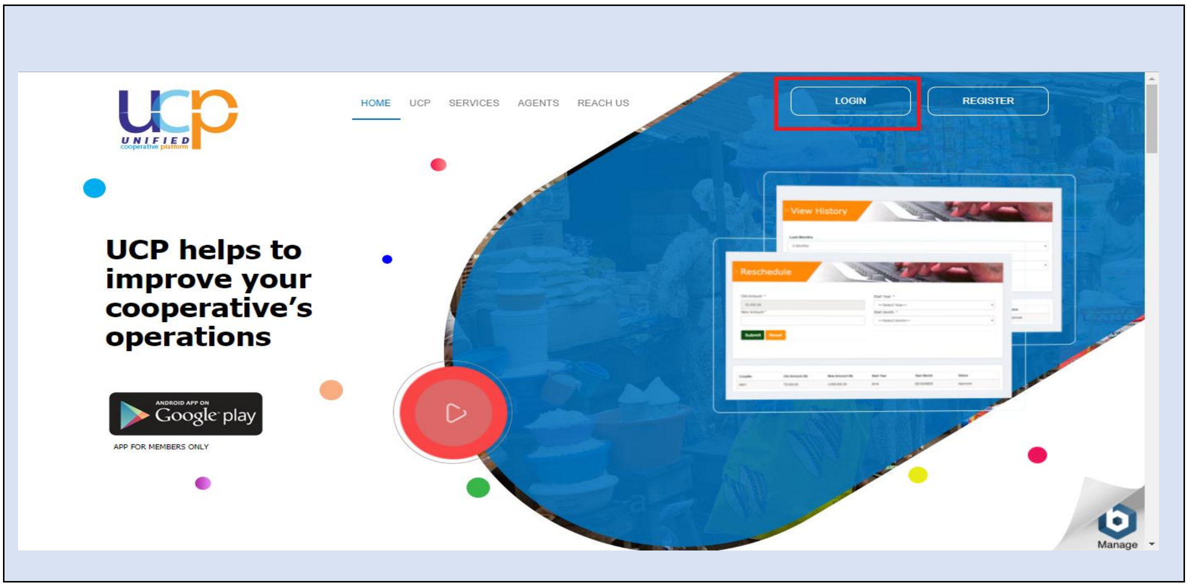
7. On registration approval, a mail containing login credentials will be sent to the provided email address. Click on the **Login** link to login:



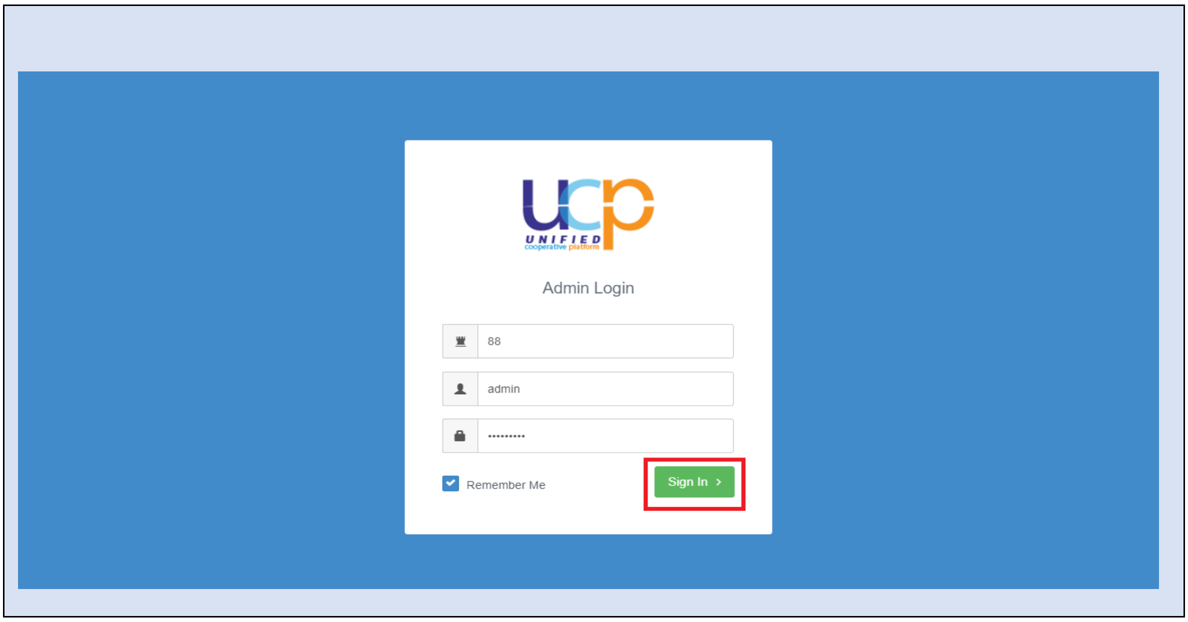
4. Login

1. Access the UCP Home Page:

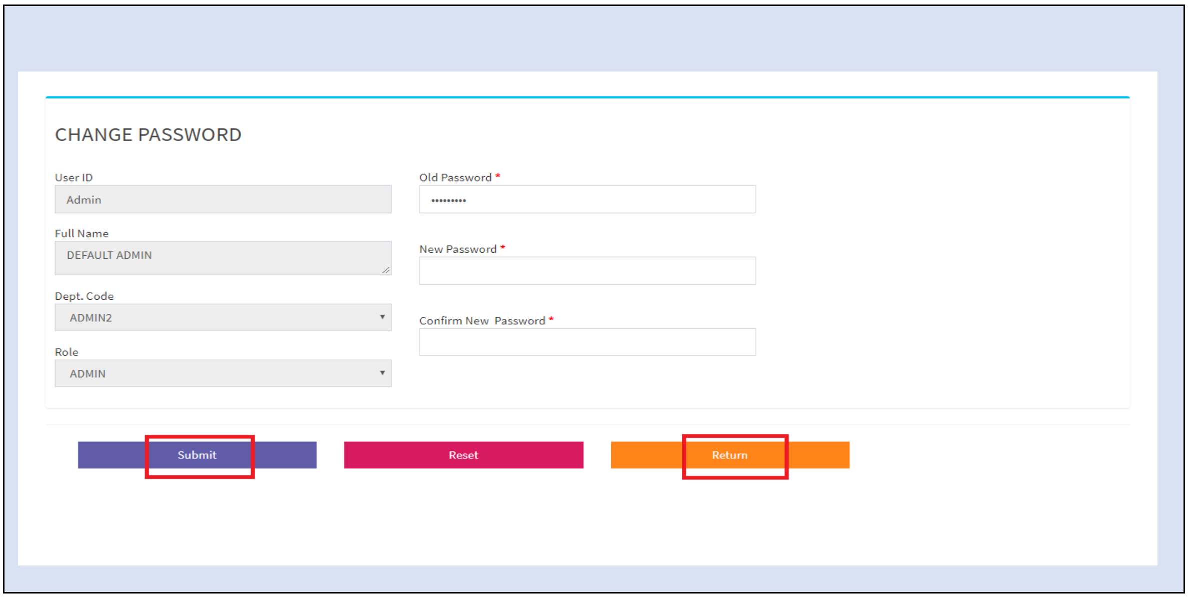
2. Click on the **Login** button:



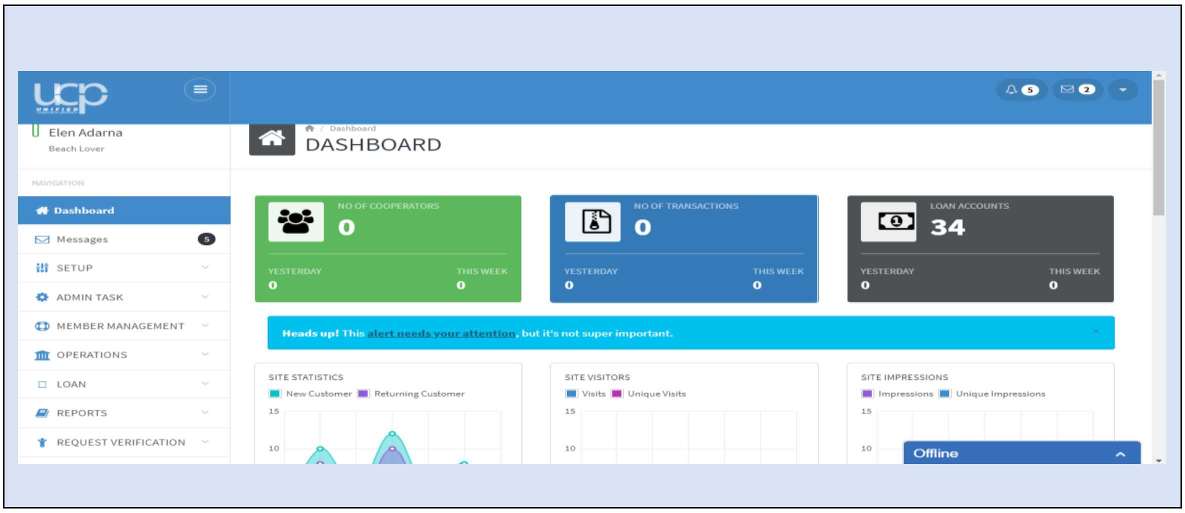
3. The Login page is displayed. Enter the Coop ID, User ID and Password and click on the **Sign In** button:



4. On first login, the application will prompt for the password to be changed. Enter the old password and new password. Confirm the new password and click on the **Submit** button. Click on the **Return** button to return to the Login page:



5. On Successful login, the Dashboard is displayed:

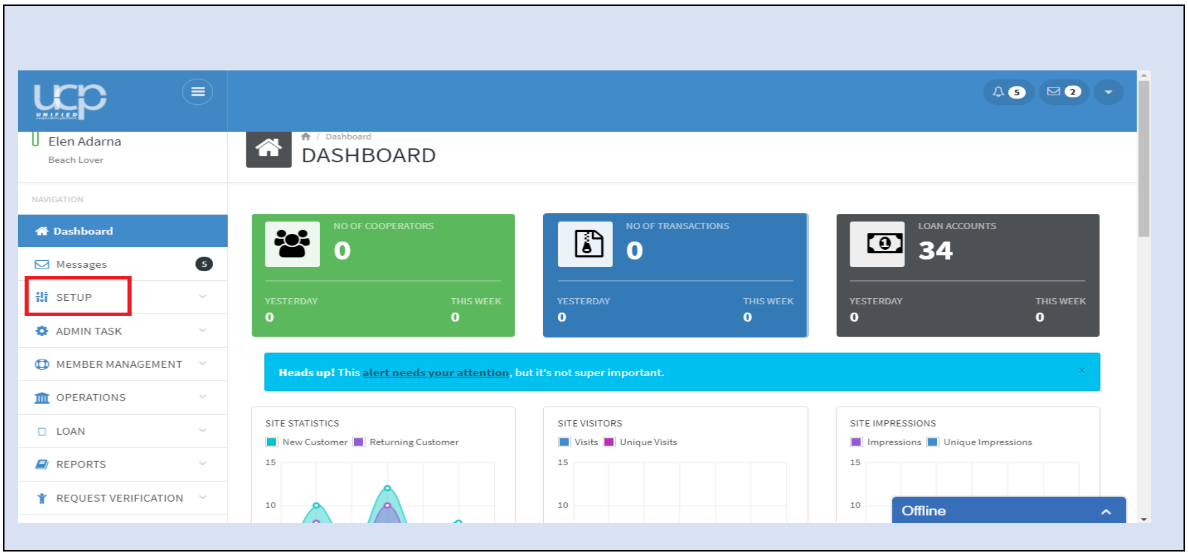


5. Setup

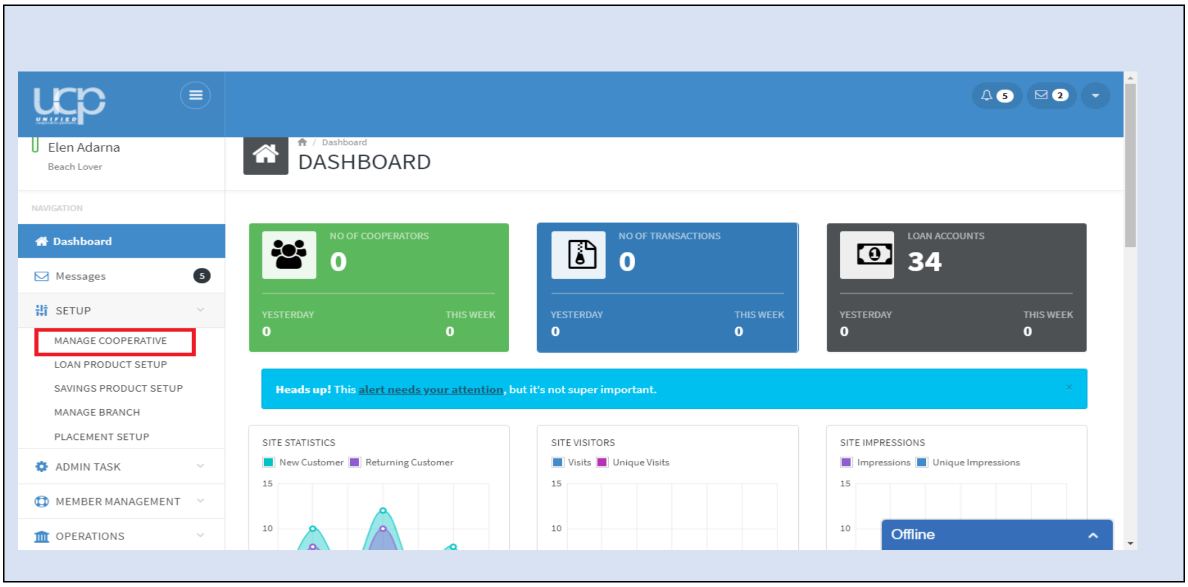
This is the menu where the Cooperative is setup for operations. The creation of products and management of the cooperative and its branches can be done here:

5.1. Manage Cooperative

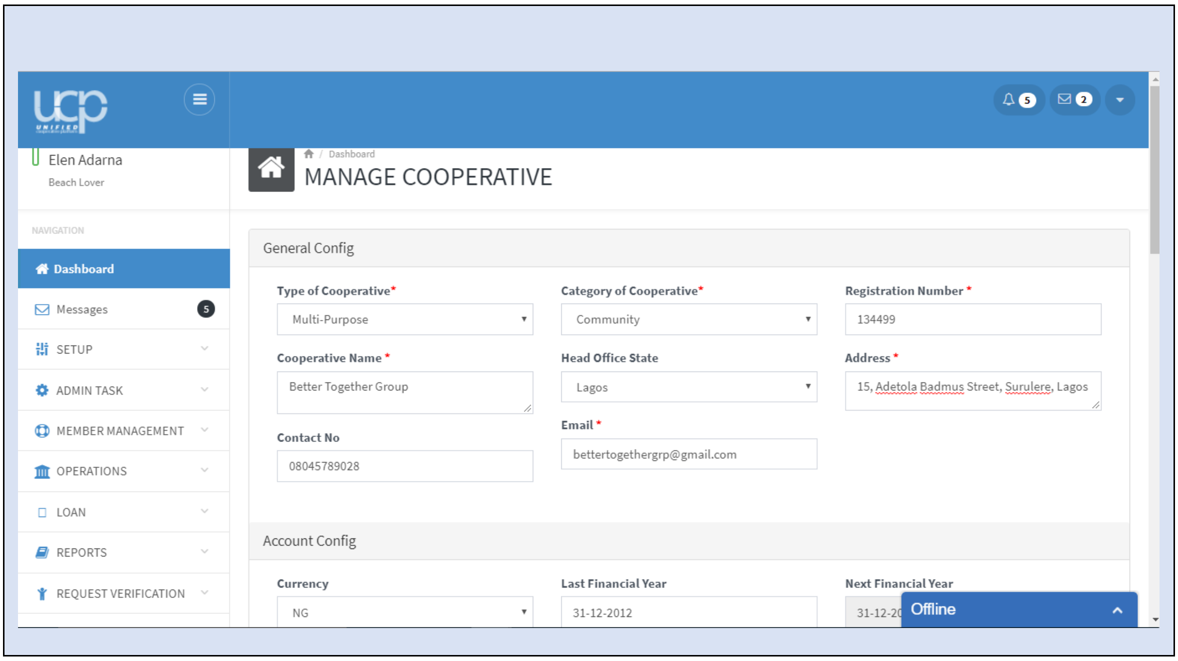
1. Login and click on the **Setup** Menu:



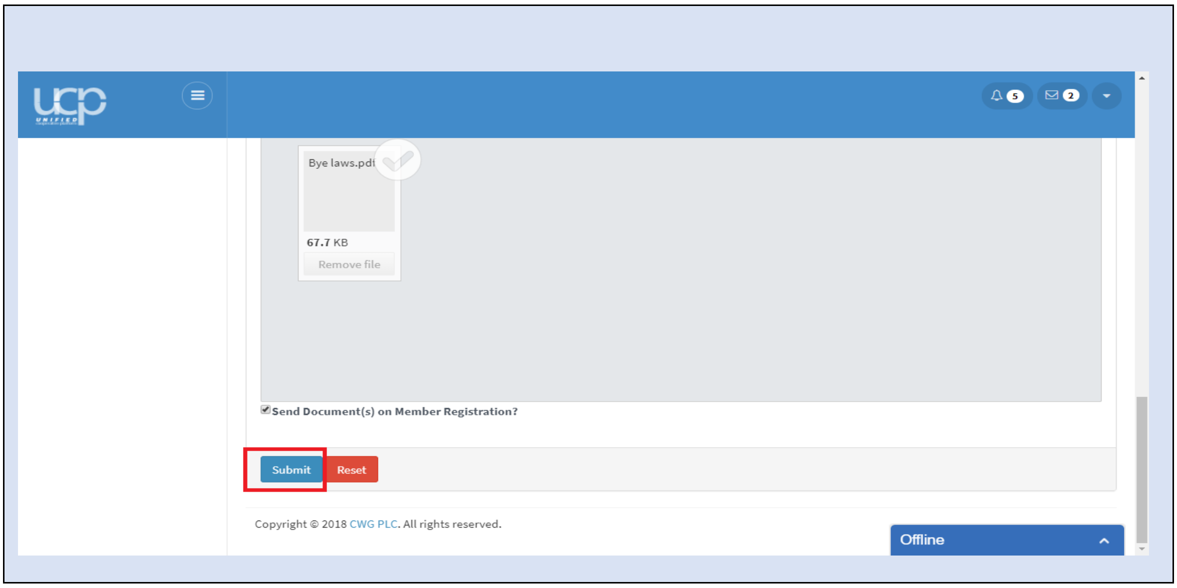
2. Click on the **Manage Cooperative** Sub menu:



3. The Manage Cooperative page is displayed. Provide the required details and files:

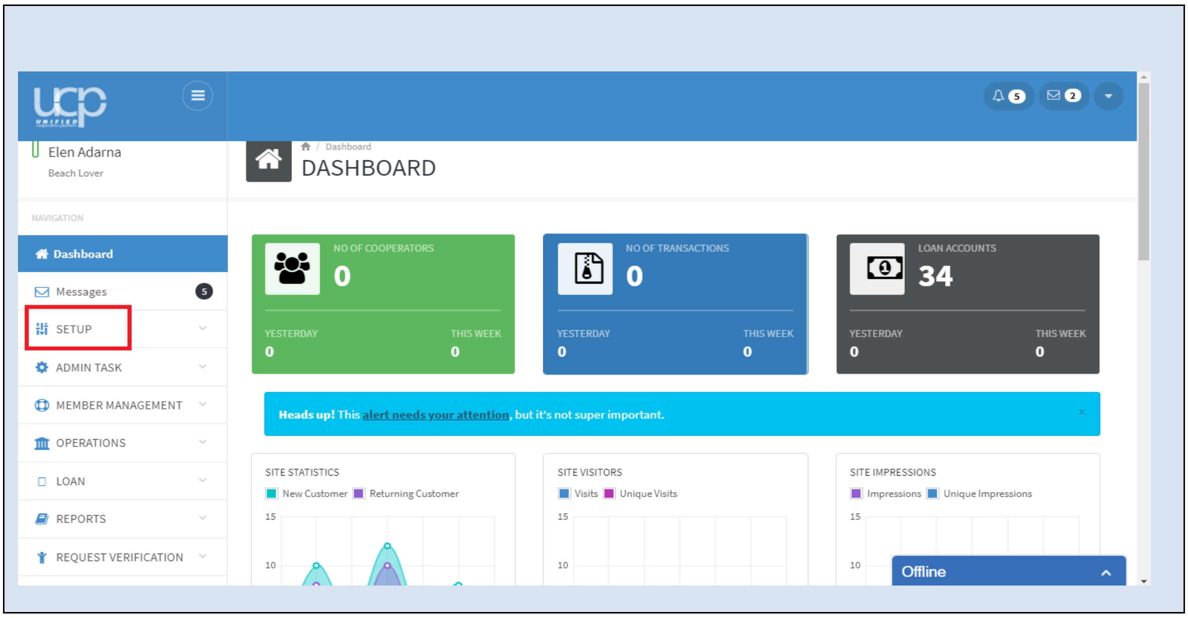


4. Click on the **Submit** button:

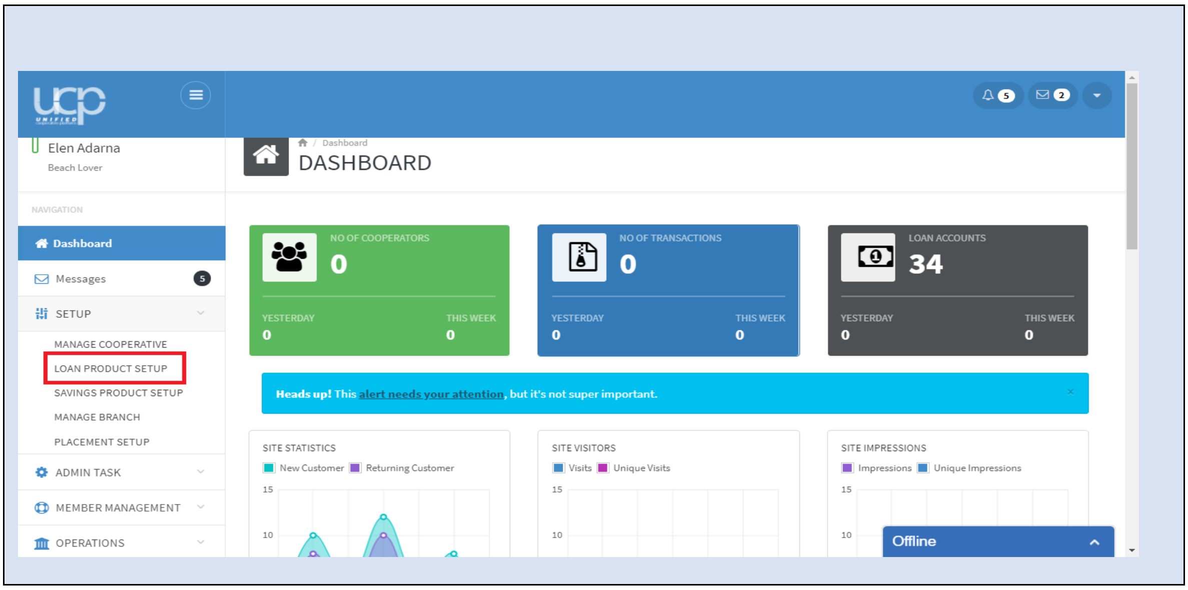


5.2. Loan Product Setup

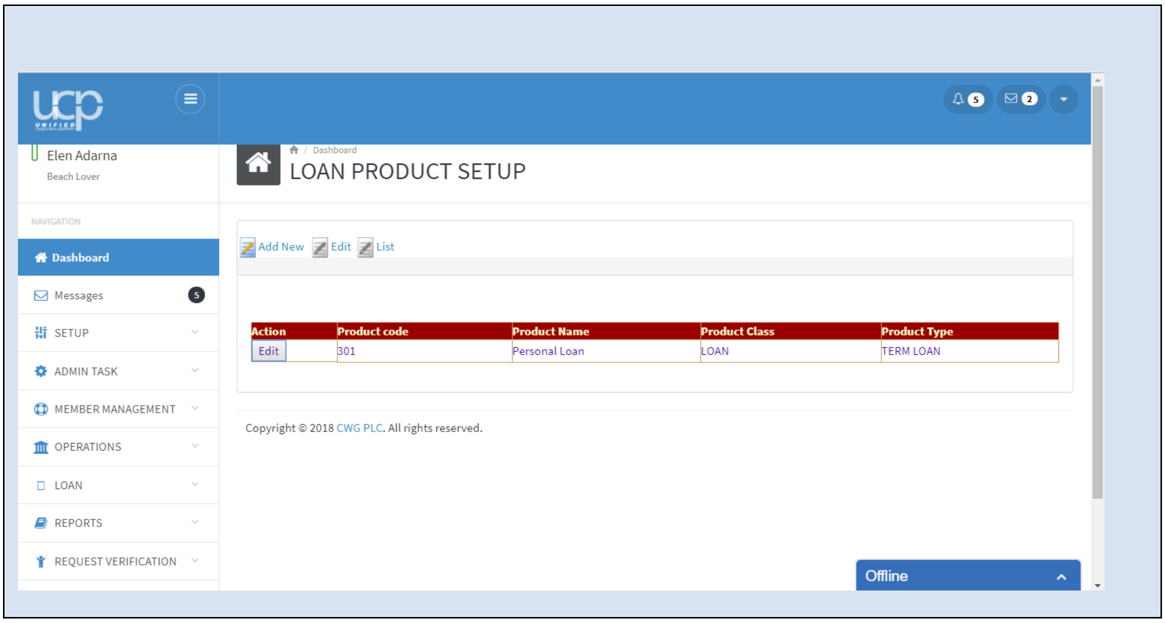
1. Login and click on the **Setup** Menu:



2. Click on the **Loan Product Setup** Sub menu:

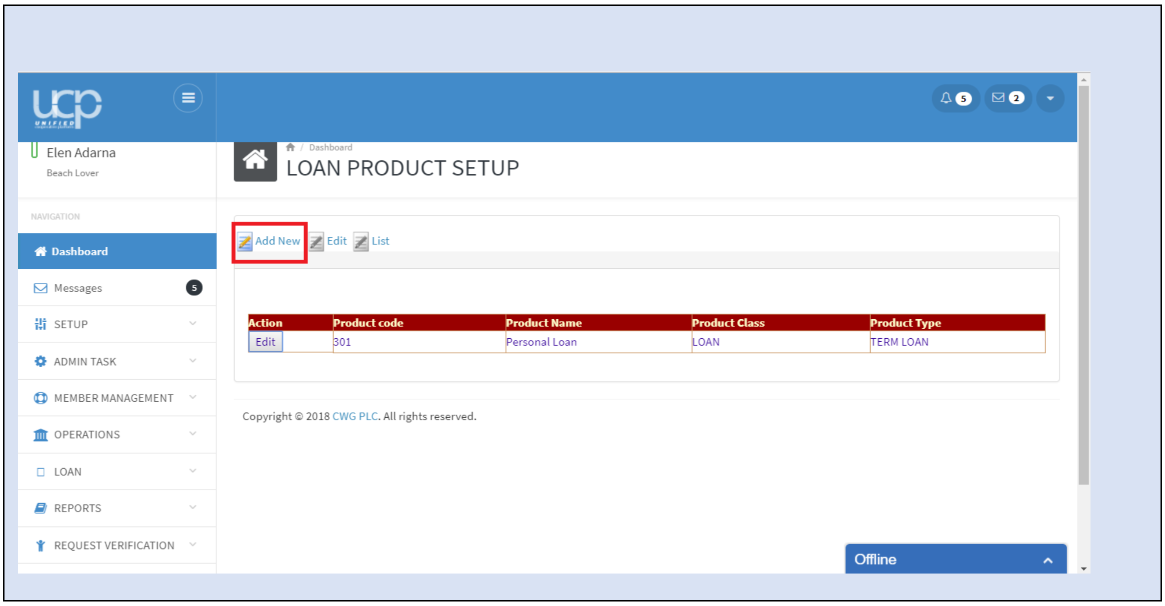


3. The Loan Product Setup page is displayed listing the existing Loan Product(s):

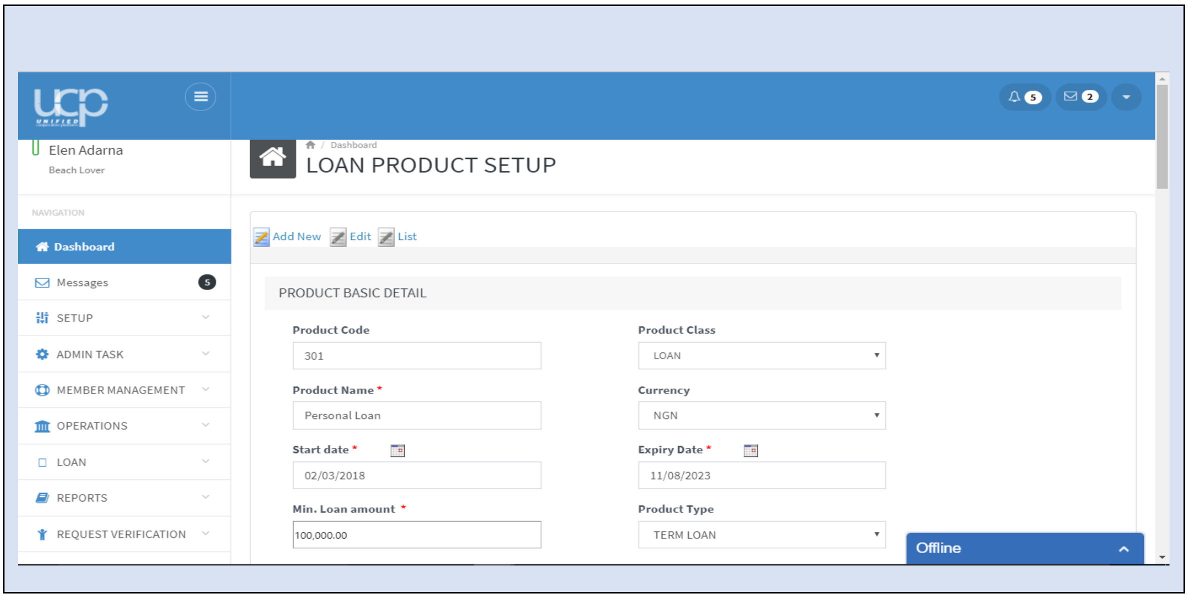


5.2.1. Add New Loan Product

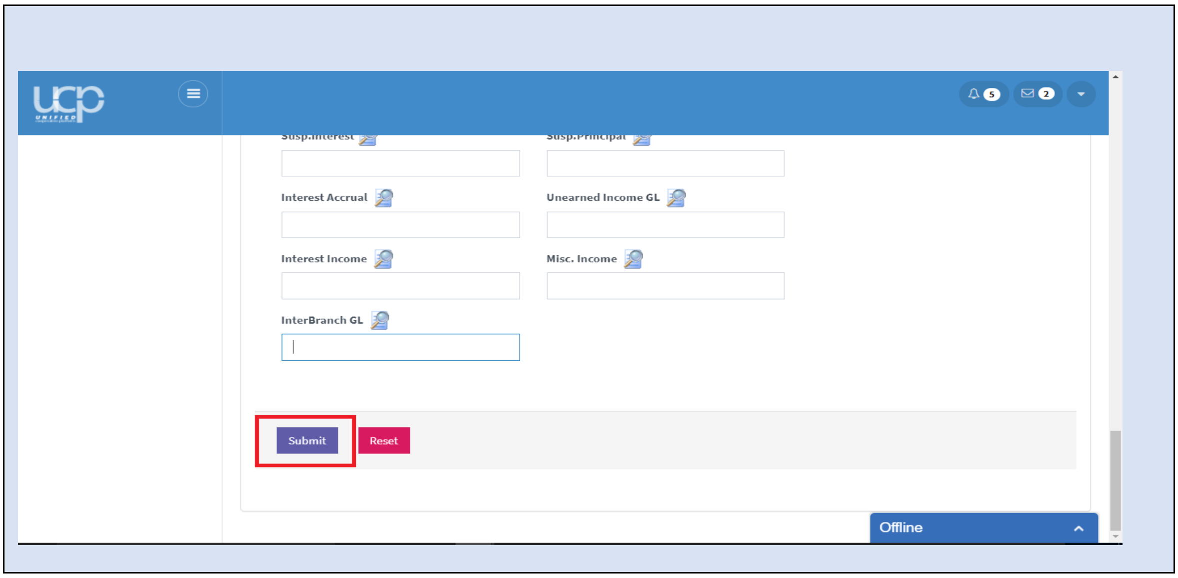
1. From the Loan Product Setup page, click on the **Add New** button:



2. Provide the required information:

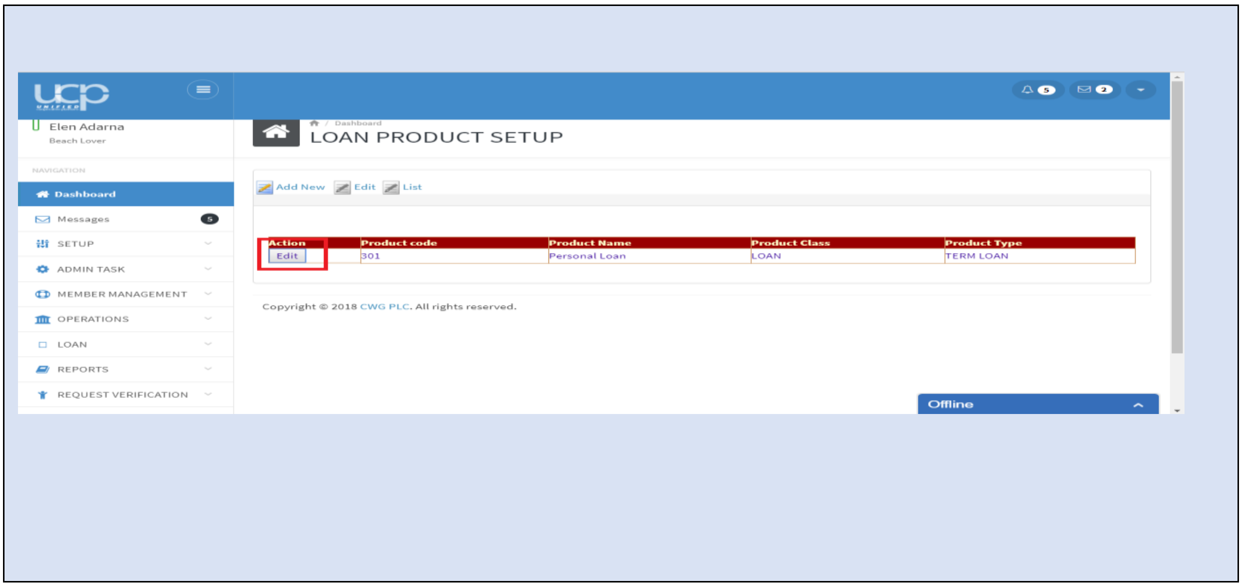


3. Click the **Submit** button:

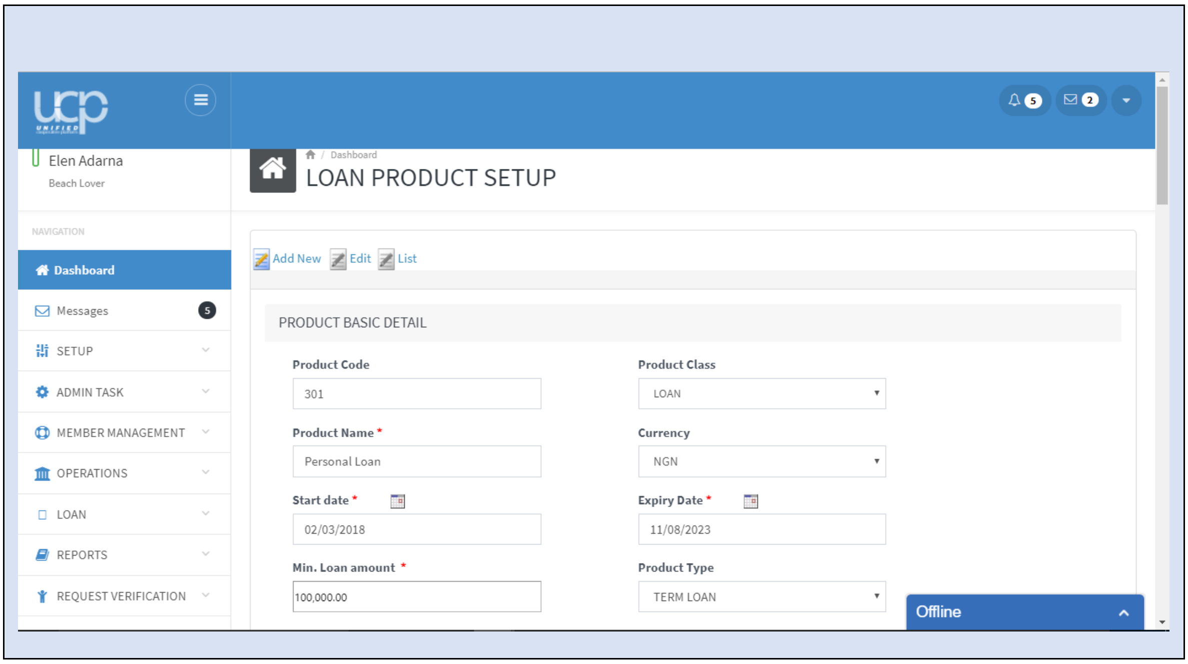


5.2.2. Edit Loan Product

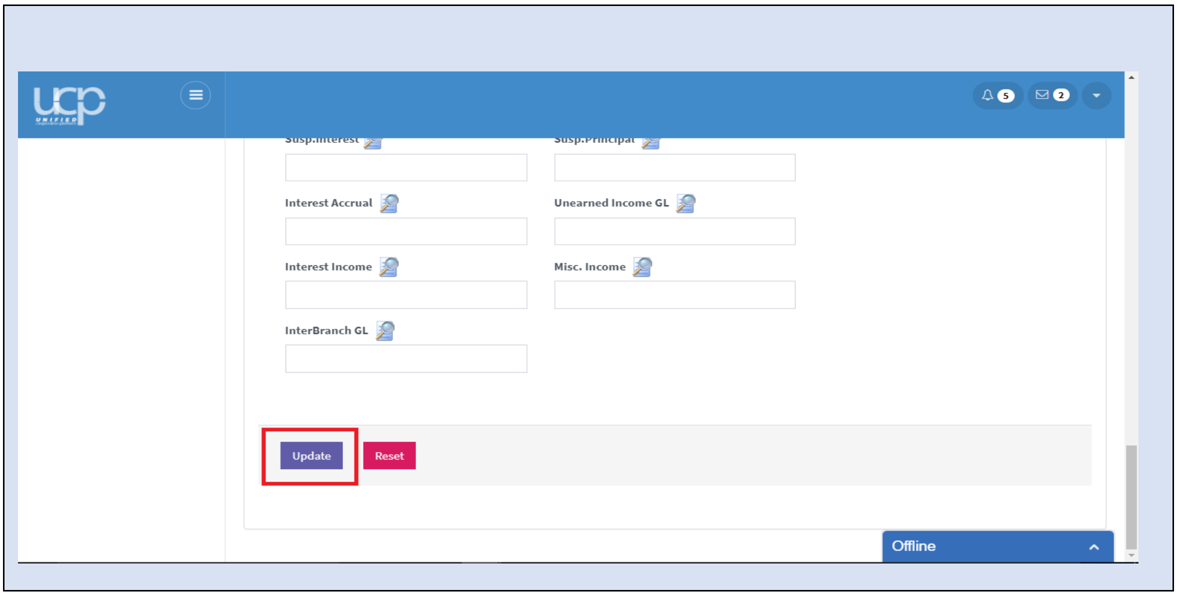
1. From the List of Loan Products, click on the **Edit** button for the particular Loan Product to be edited:



2. Edit the Loan Product details:

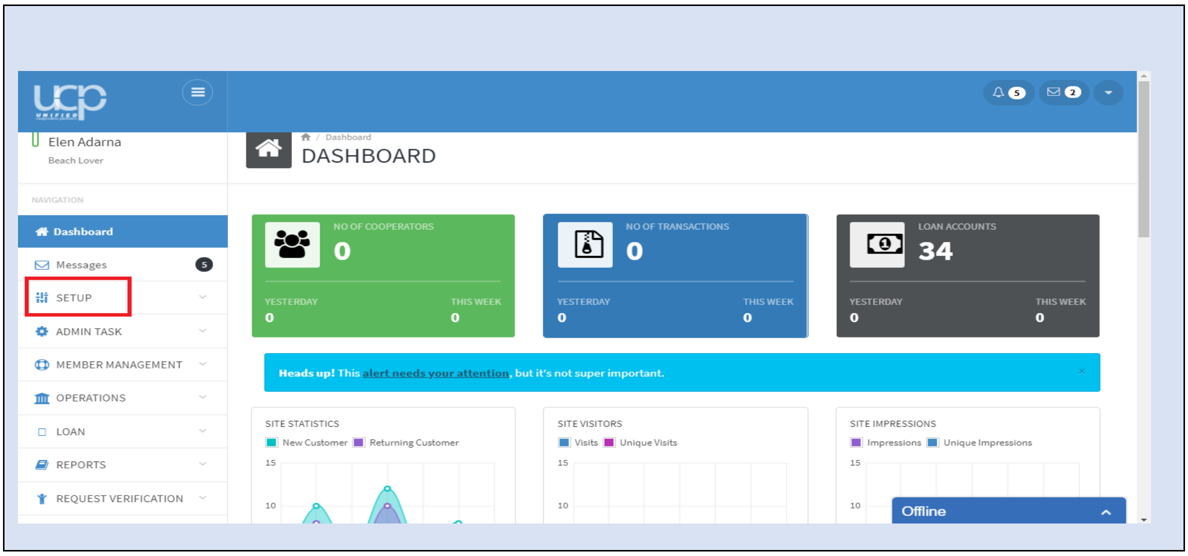


3. Click on the **Update** button:

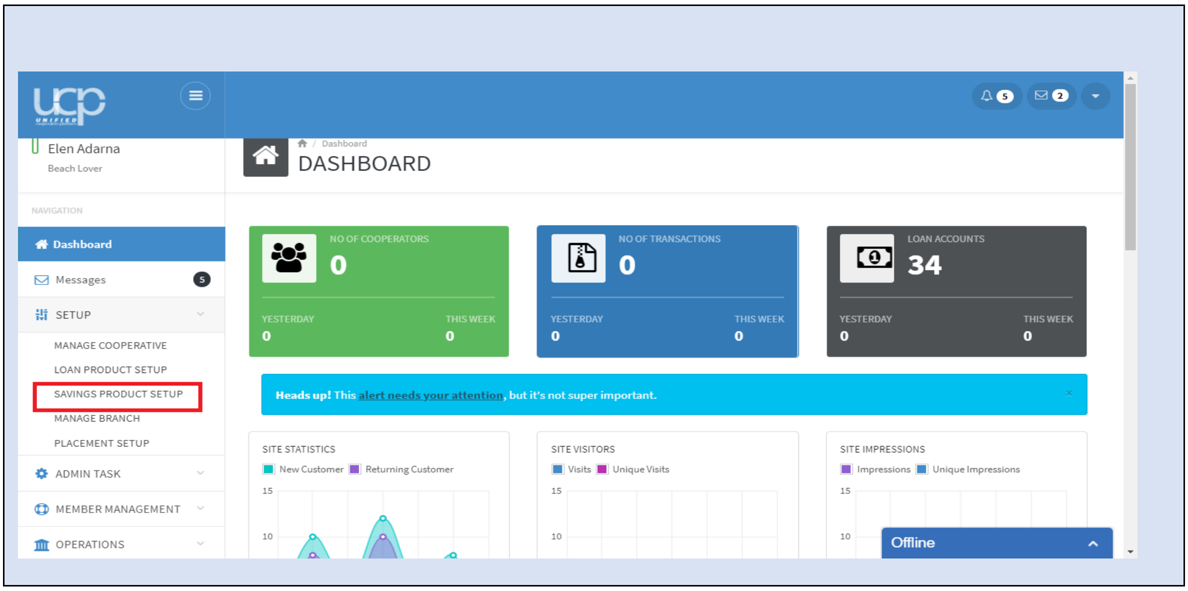


5.3. Savings Product Setup

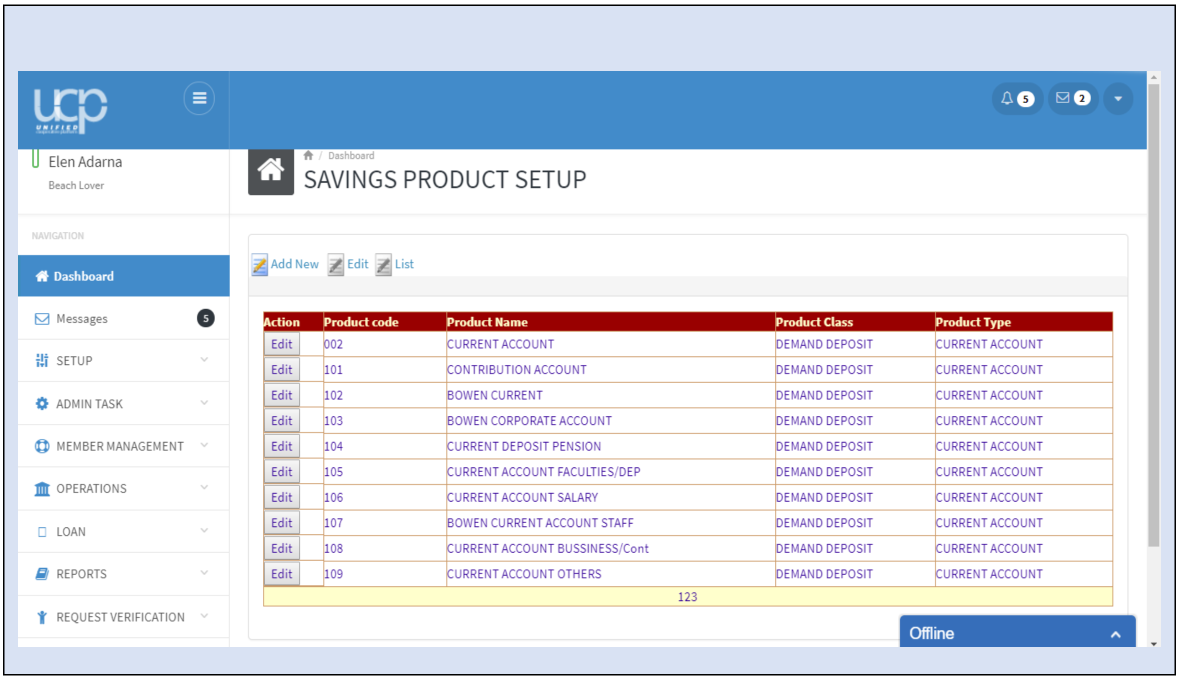
1. Login and click on the **Setup** Menu:



2. Click on the **Savings Product Setup** Sub menu:

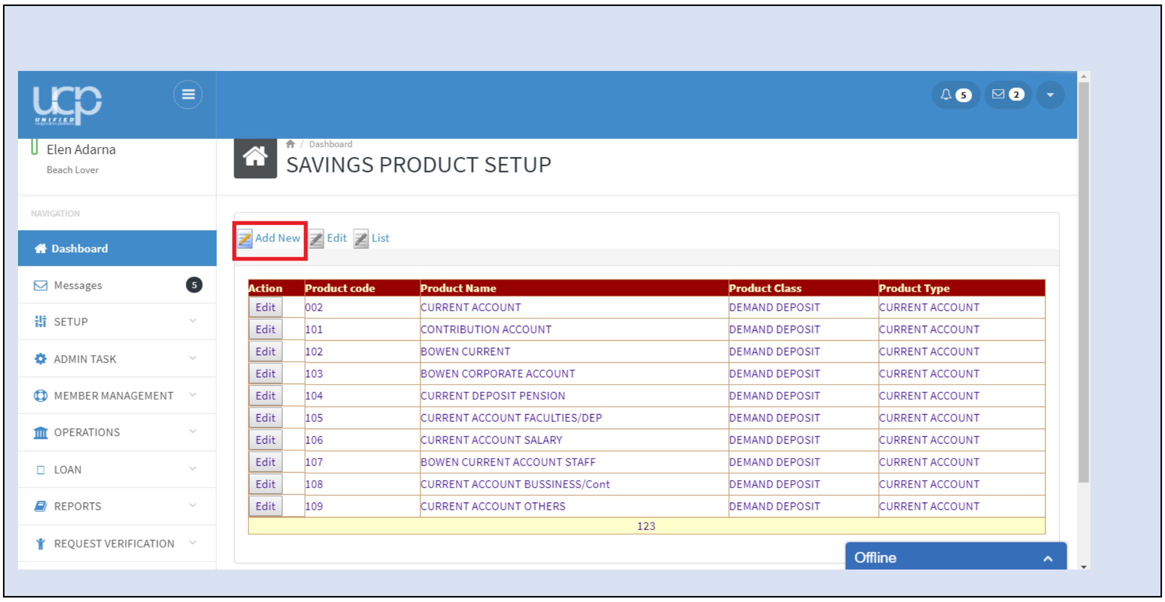


3. The Savings Product Setup page is displayed listing the existing savings products:

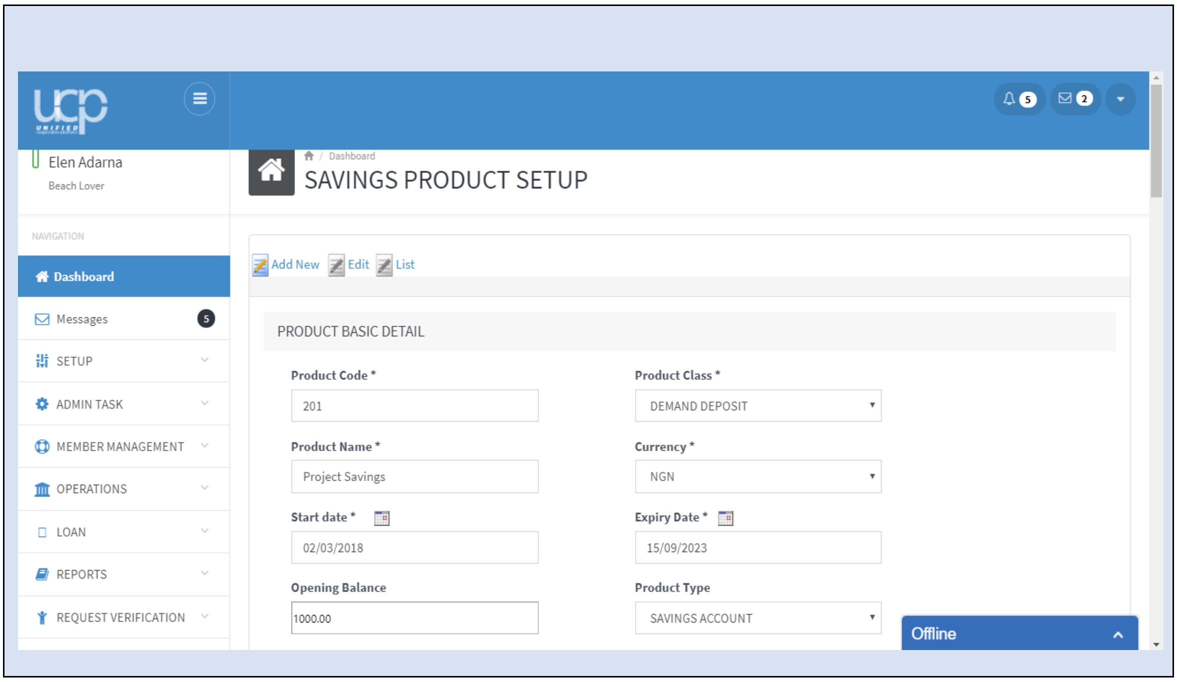


5.2.1. Add New Savings Product

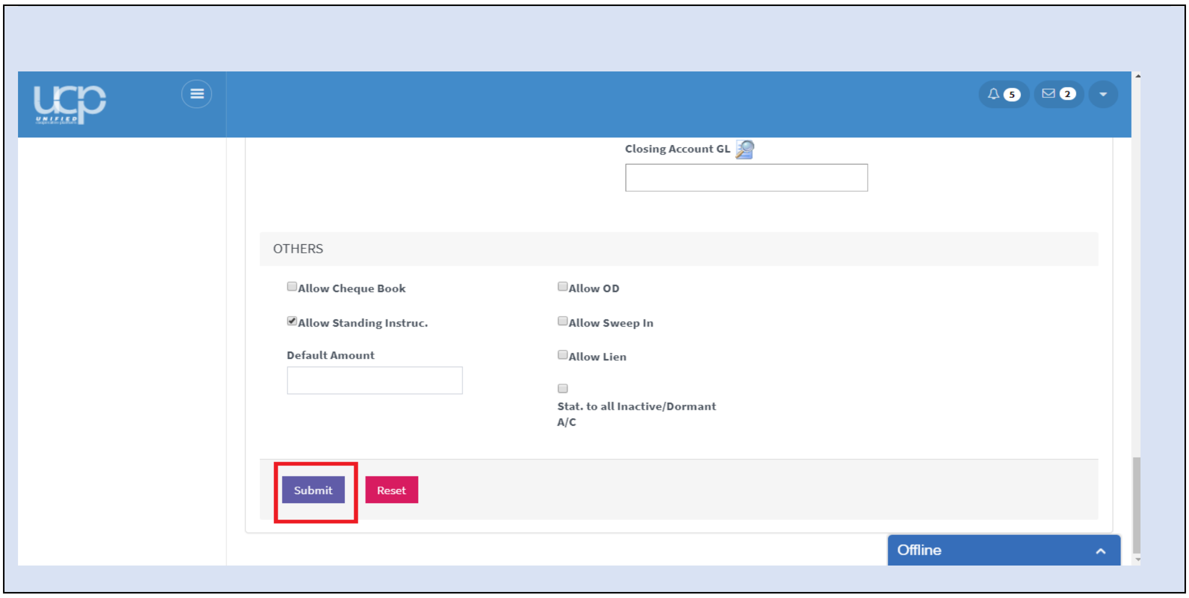
1. From the Savings Product Setup page, click on the **Add New** button:



2. Provide the required information:

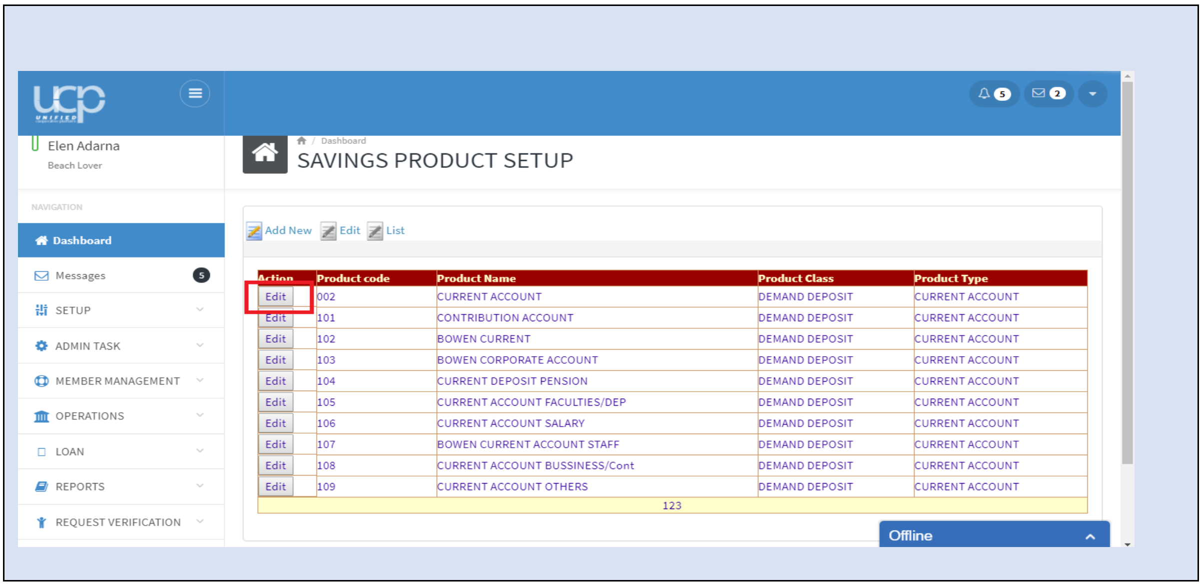


3. Click the **Submit** button:

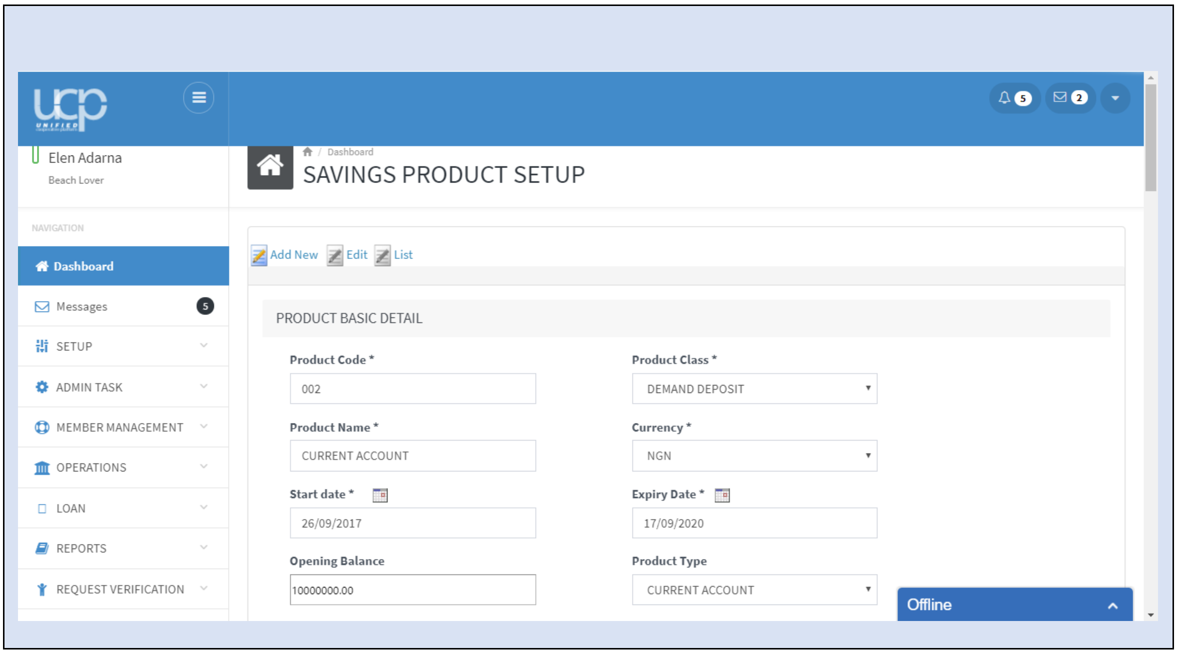


5.2.2. Edit Savings Product

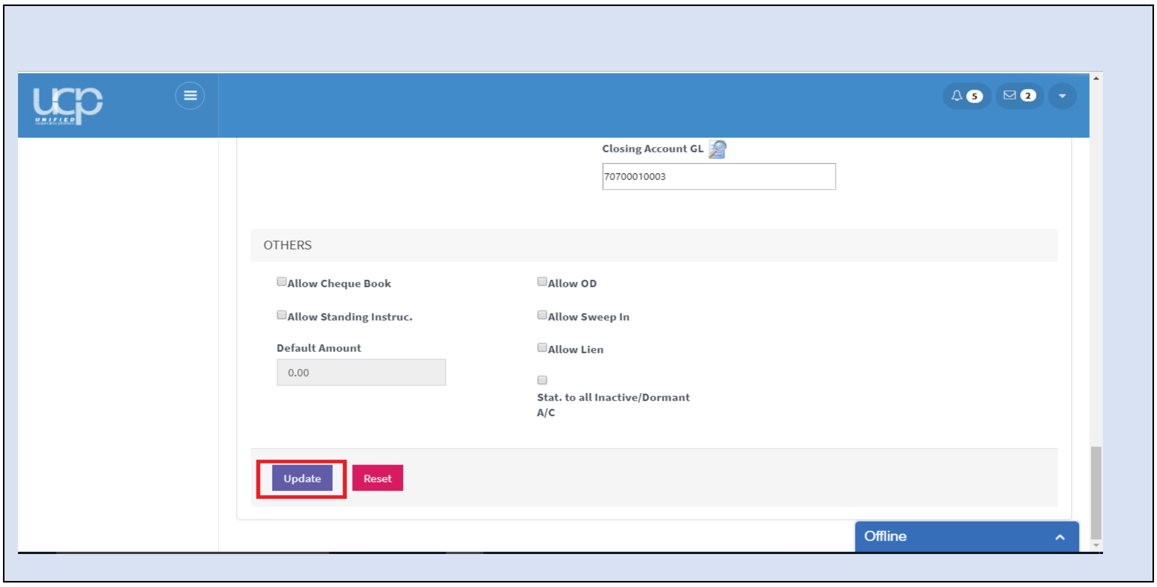
1. From the List of Savings Products, click on the **Edit** button for the particular Savings Product to be edited:



2. Edit the Savings Product details:



3. Click on the **Update** button:

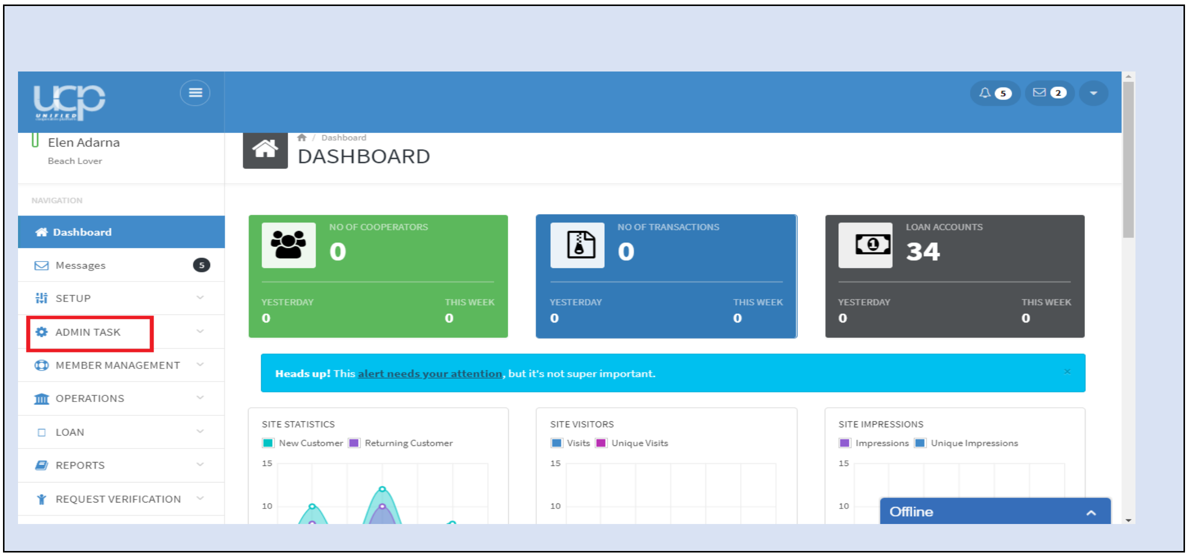


6. Admin Task

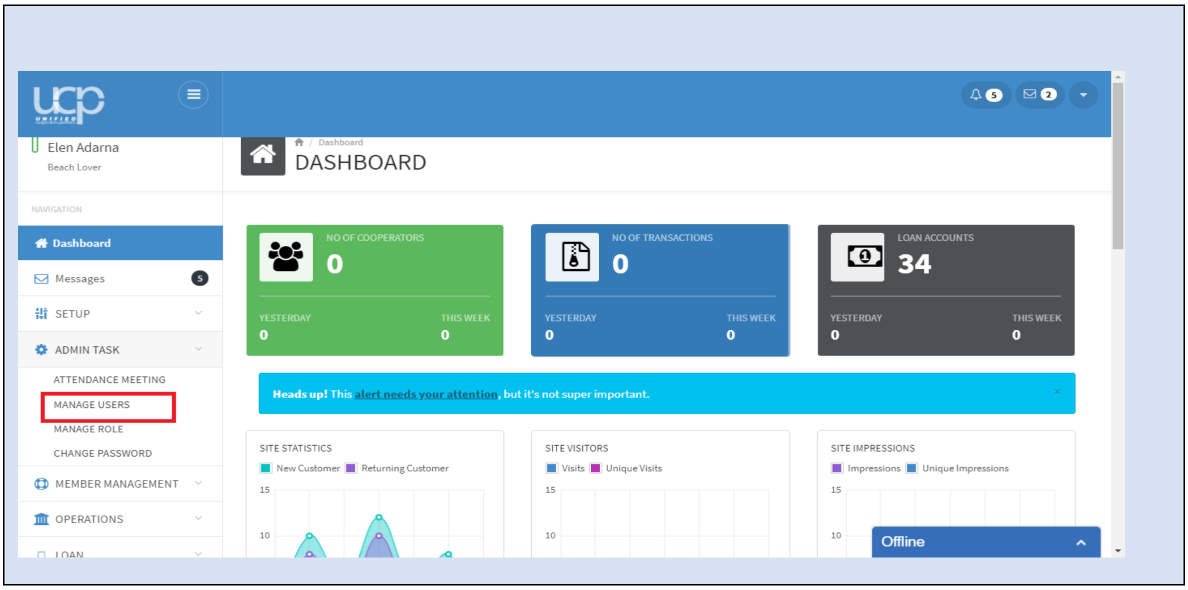
This is the menu where administrative tasks like User and role management are carried out.

6.1. Manage Users

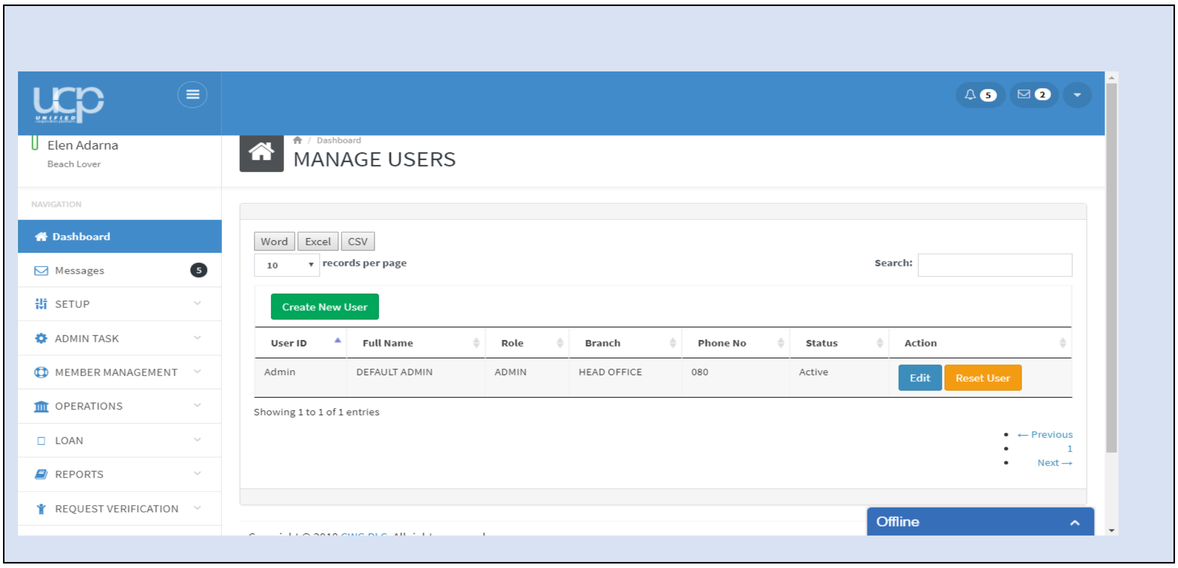
1. Login and click on the **Admin Task** Menu:



2. Click on the **Manage Users** Sub menu:

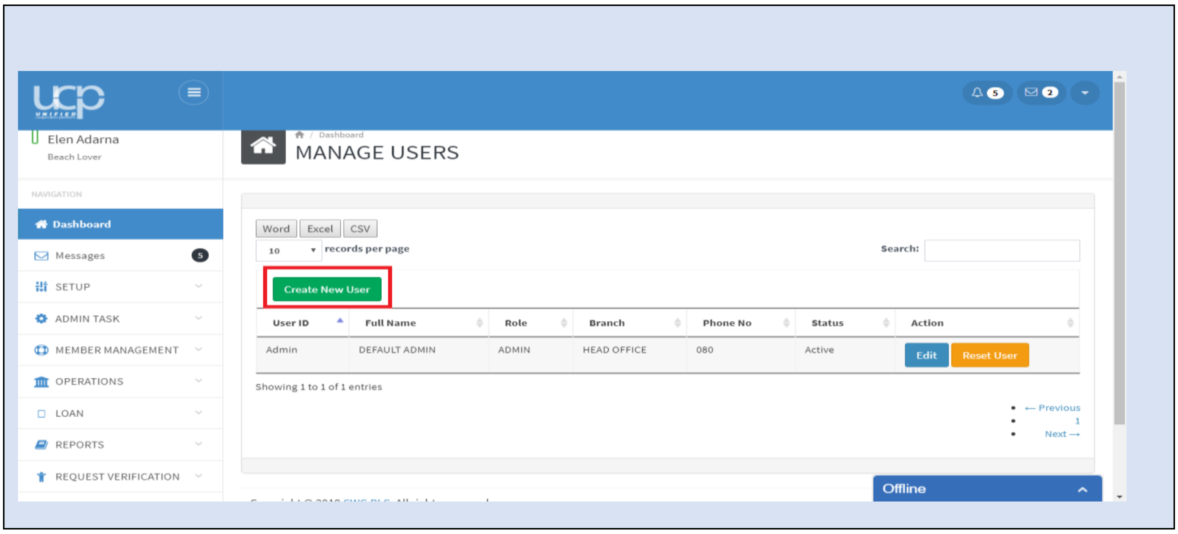


3. The Manage Users page is displayed listing the created users:

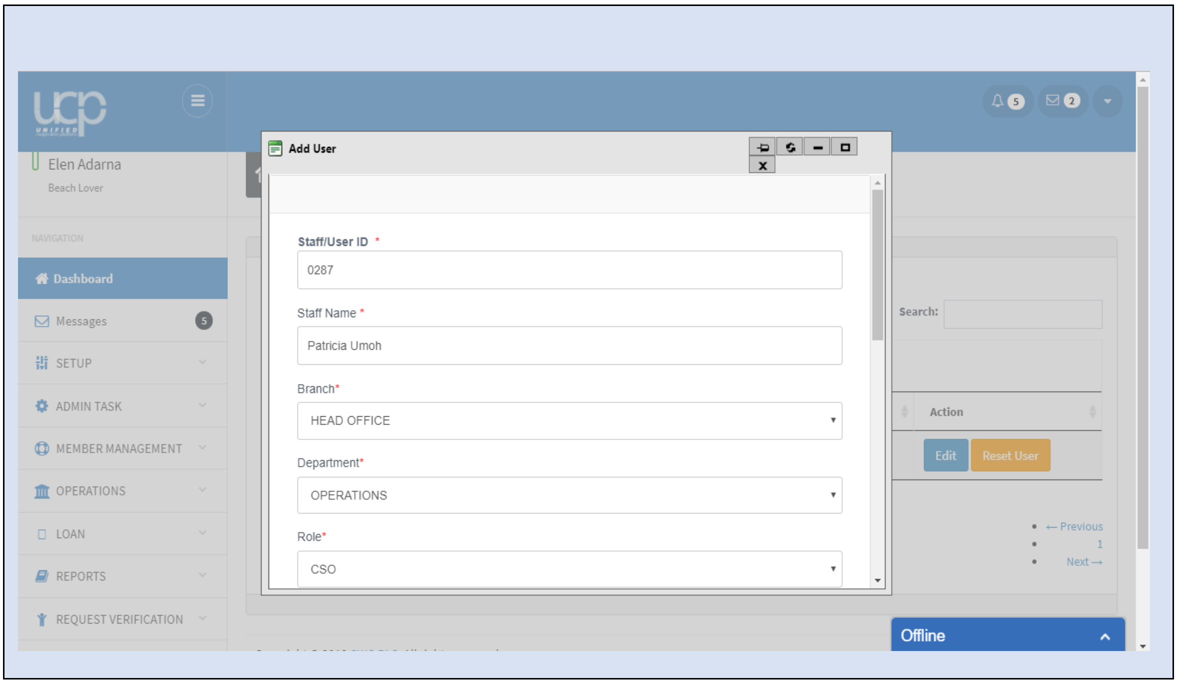


6.1.1. Add New User

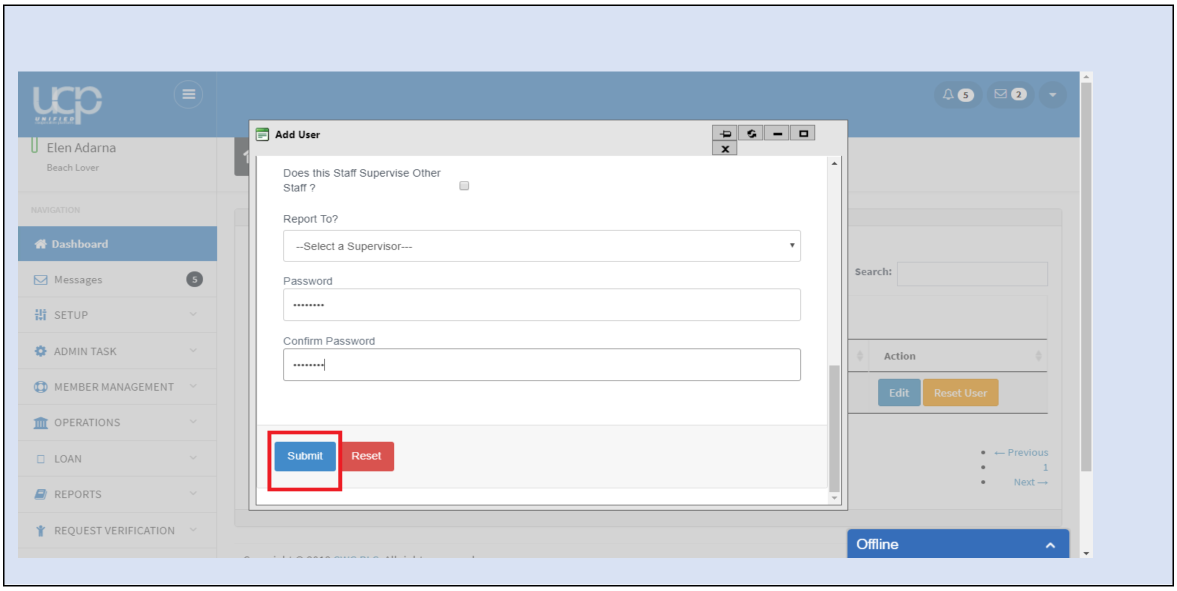
1. From the Manage Users page, click on the **Create New User** button:



2. Provide the User's details:

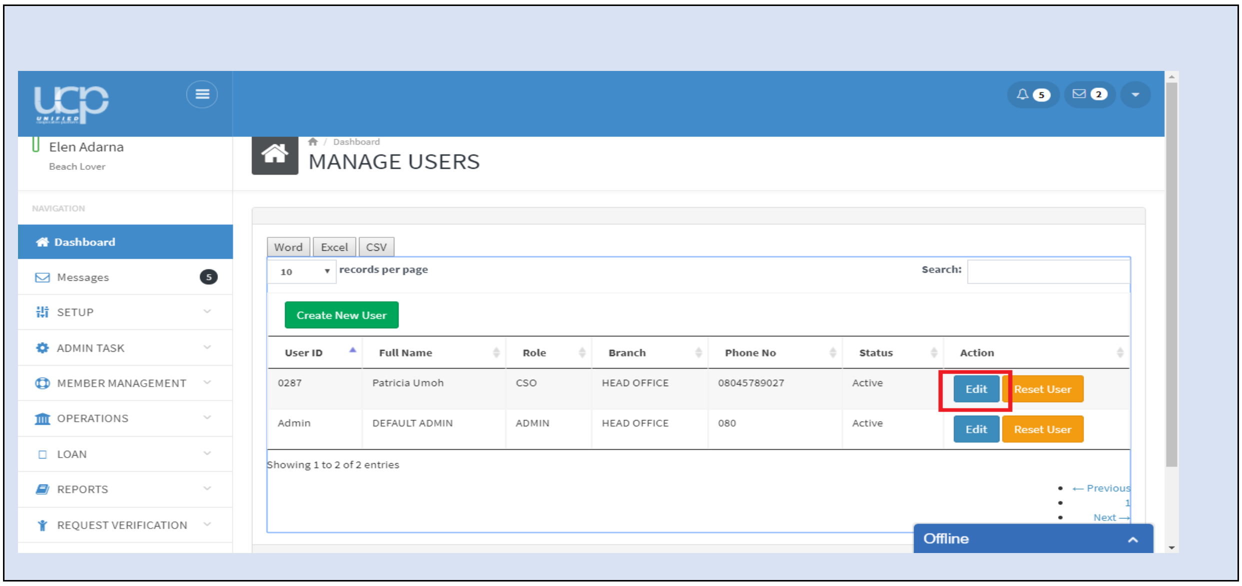


3. Click on the **Submit** button:

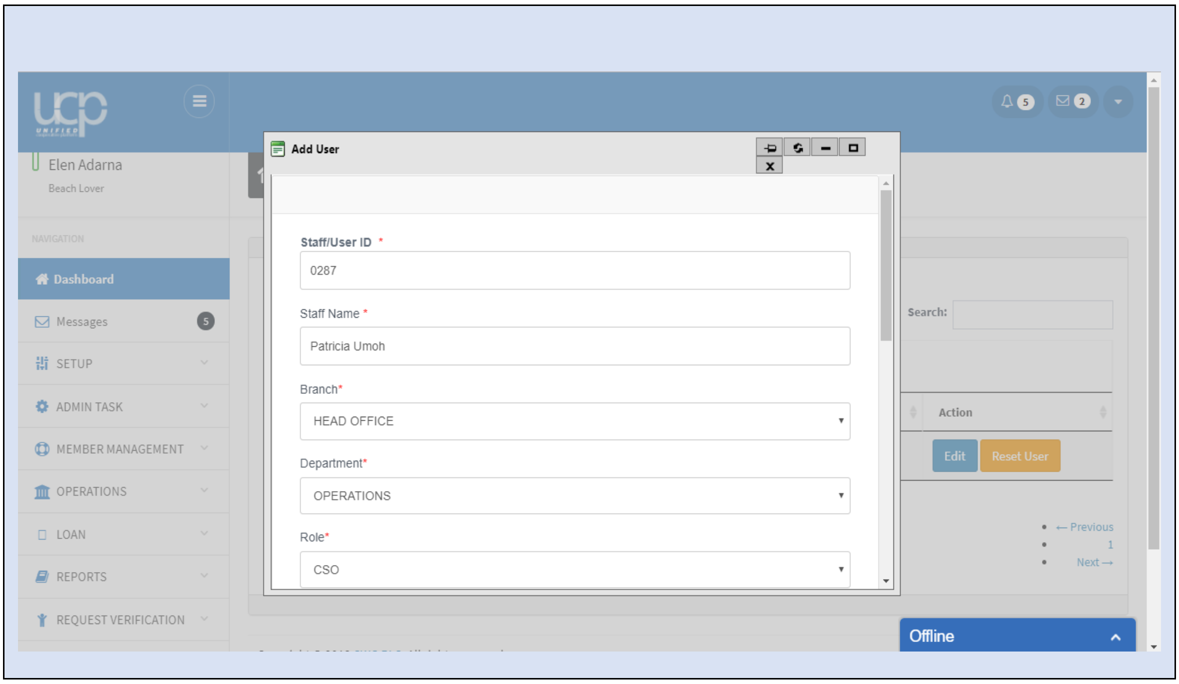


6.1.2. Edit User

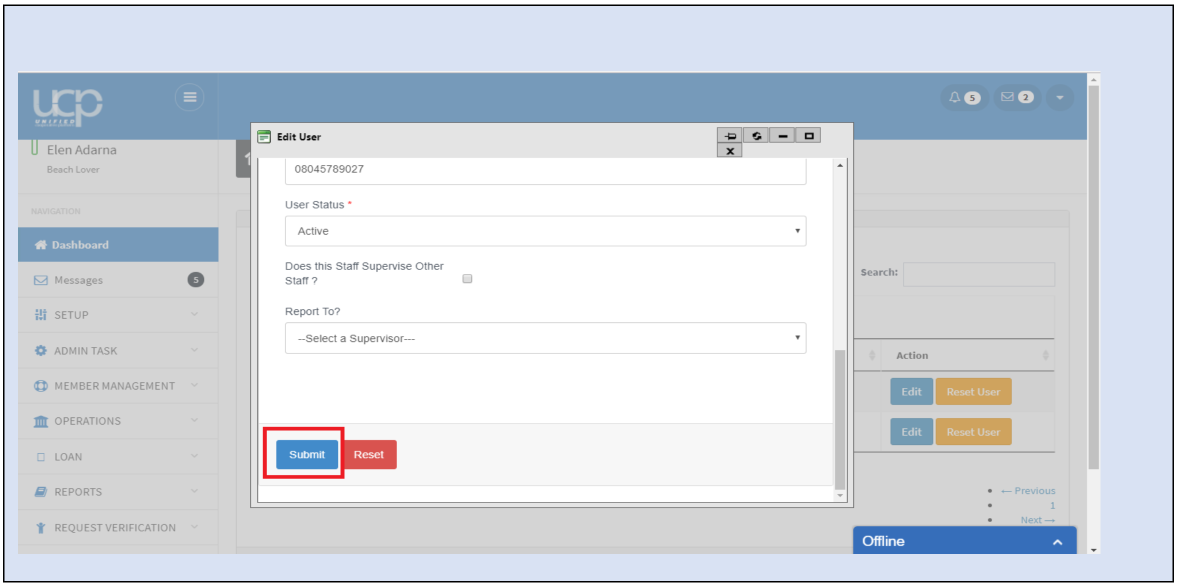
1. From the Manage Users page, click on the **Edit** button for the particular user to be edited:



2. Edit the user details:

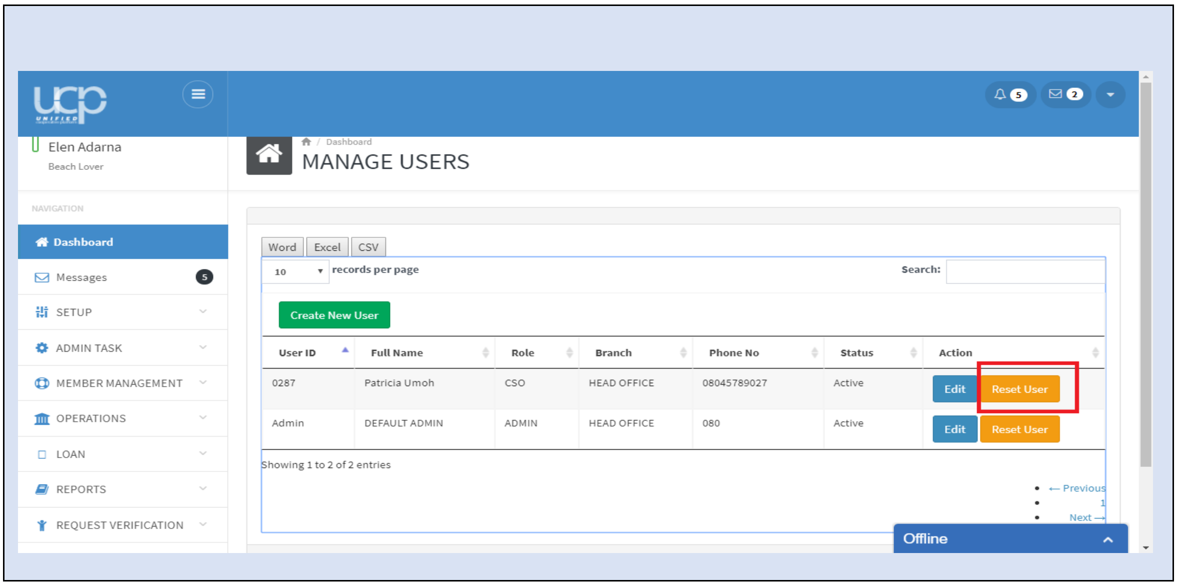


3. Click on the **Submit** button:

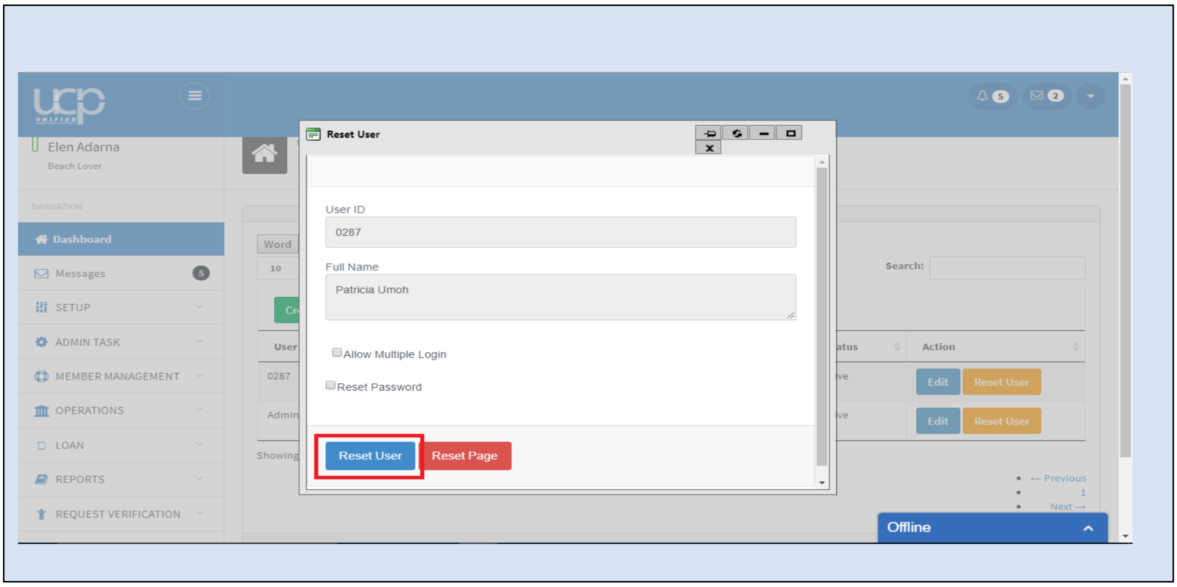


6.1.3. Reset User

1. From the Manage Users page, click on the **Reset User** button for the particular user to be edited:

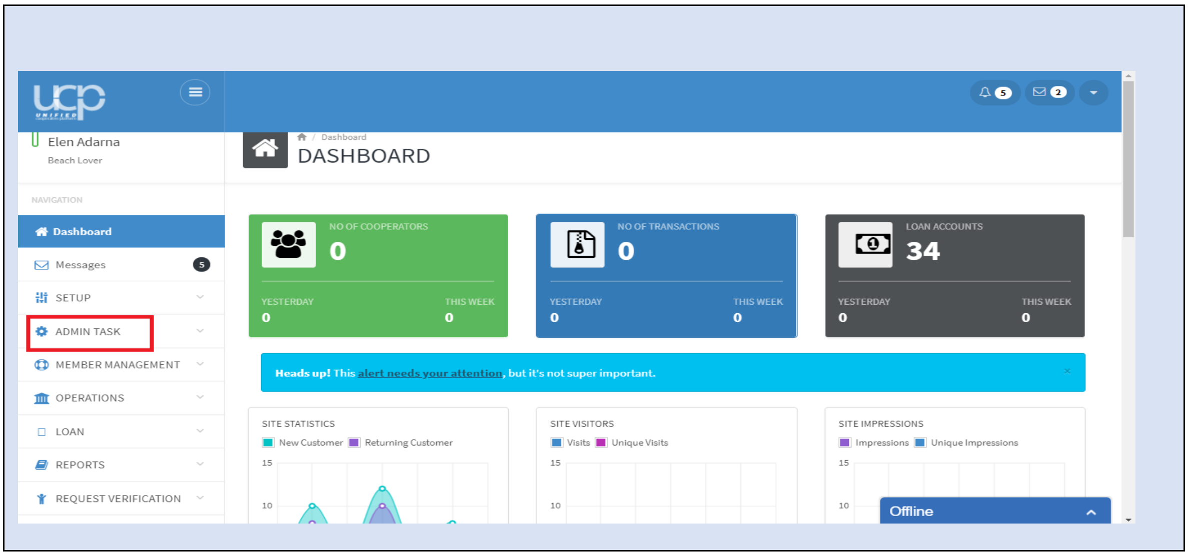


2. Check the applicable checkboxes to allow multiple login or/and reset password (if required) and click the **Reset User** button:

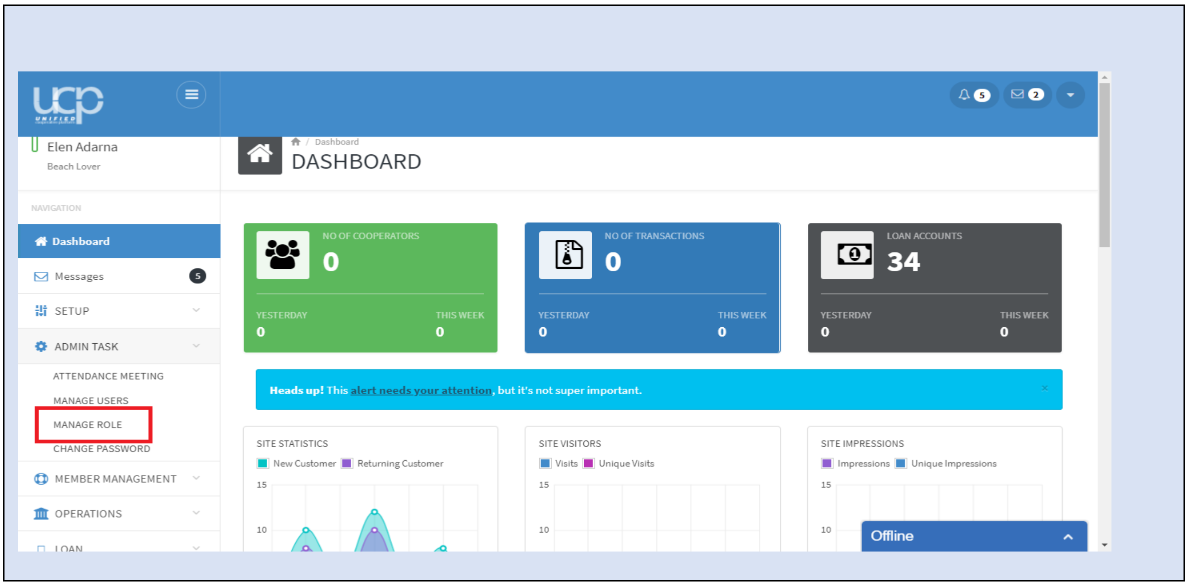


6.2. Manage Role

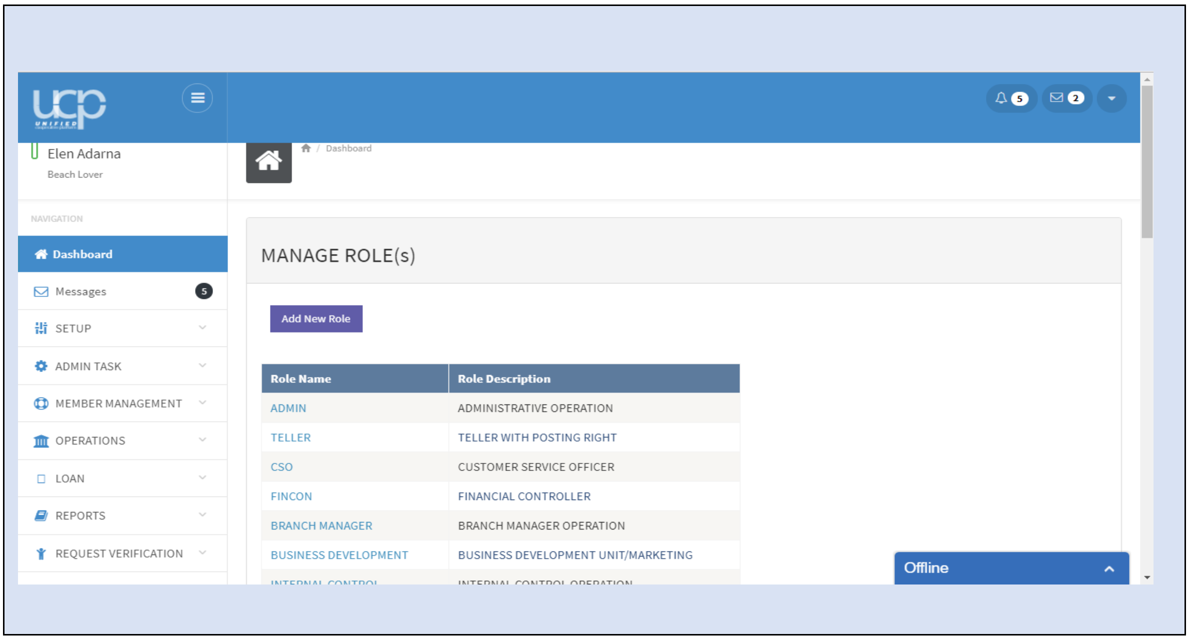
1. Login and click on the **Admin Task** Menu:



2. Click on the **Manage Role** Sub menu:

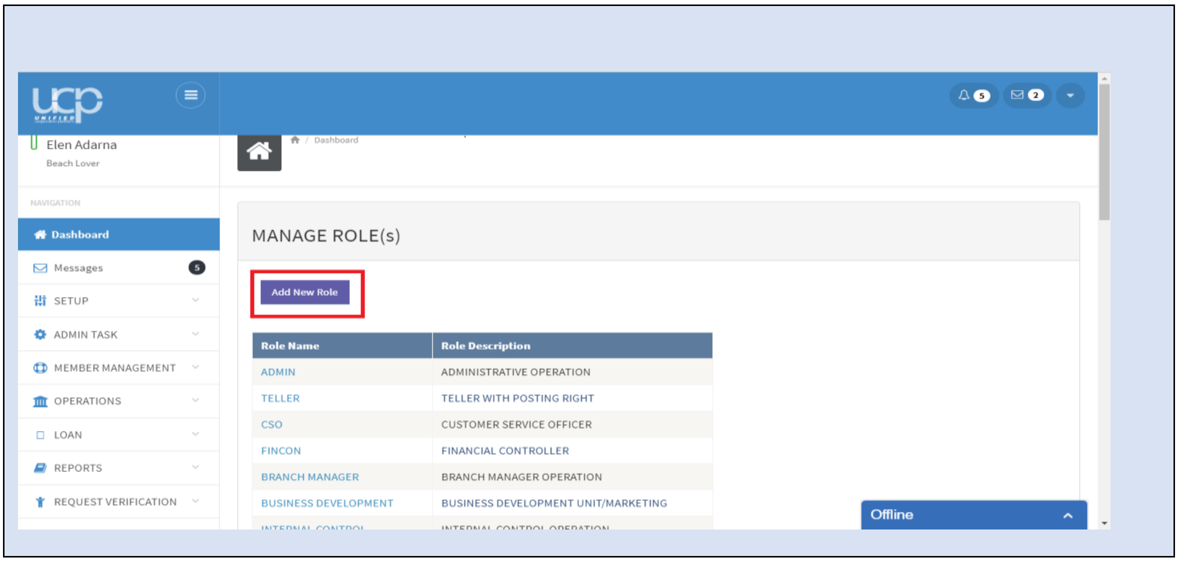


3. The Manage Role(s) page is displayed listing the existing roles and their description:

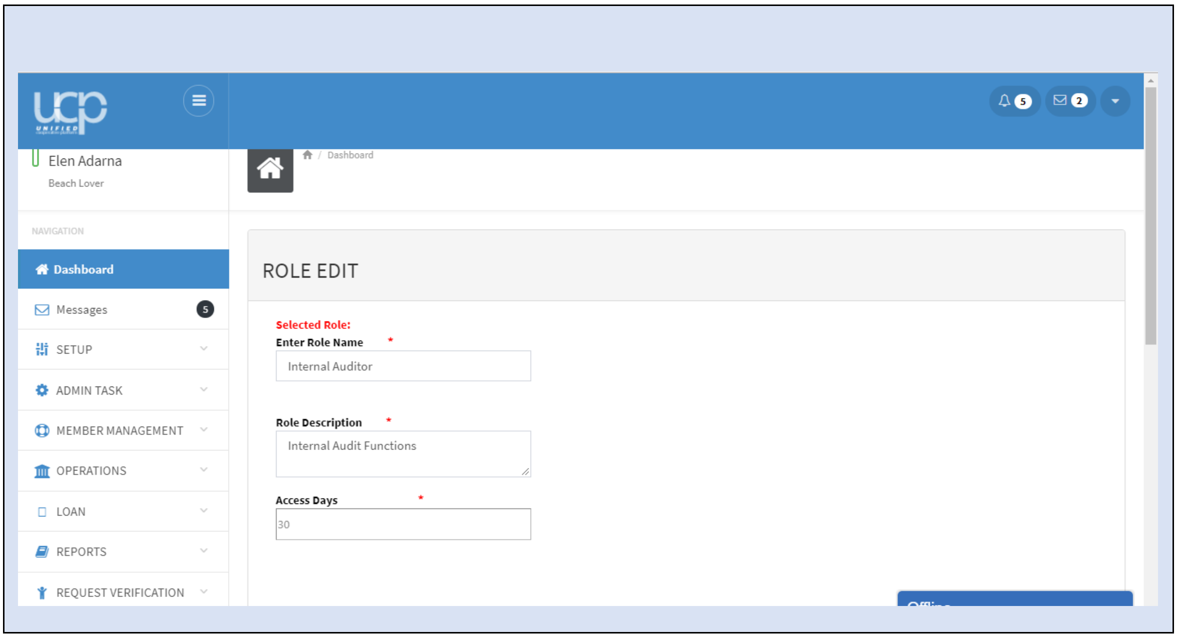


6.2.1. Add New Role

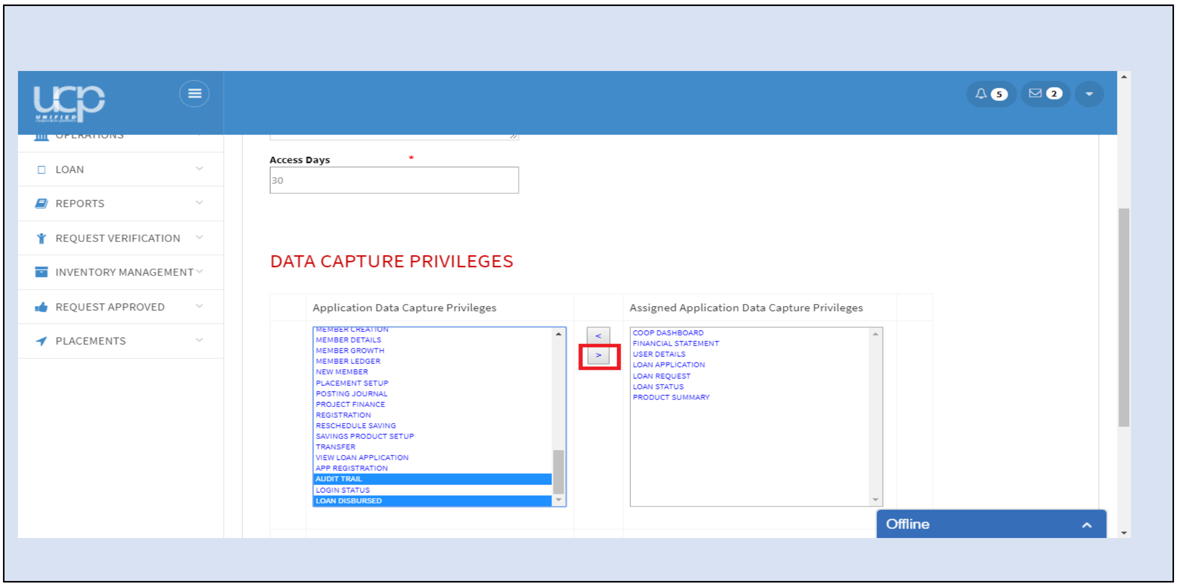
1. From the Manage Role(s) page, click on the **Add New Role** button:



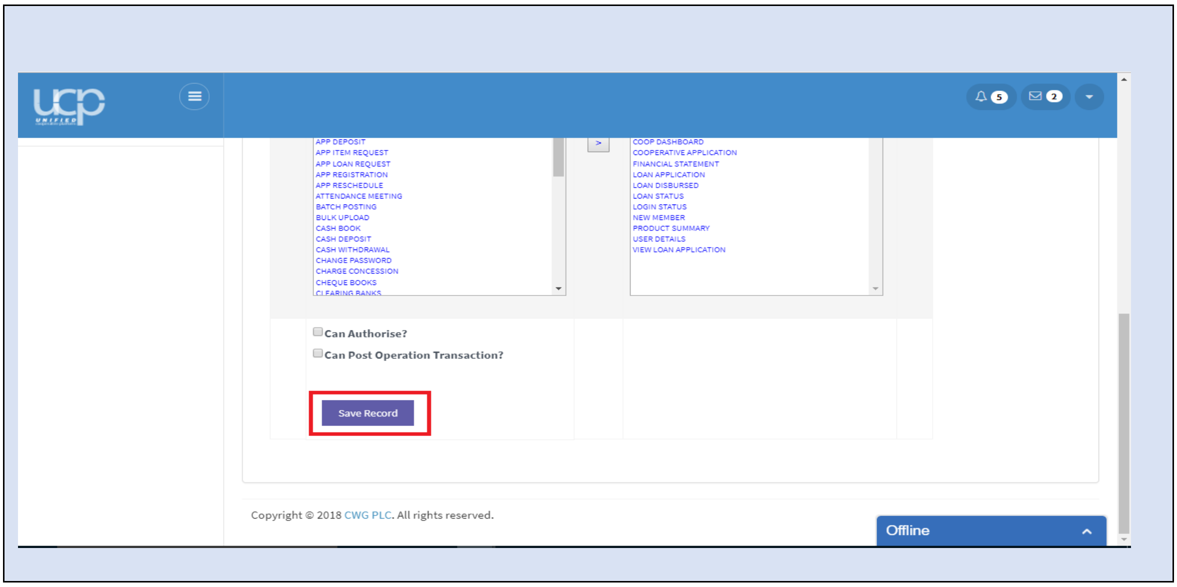
2. Provide the Role's details:



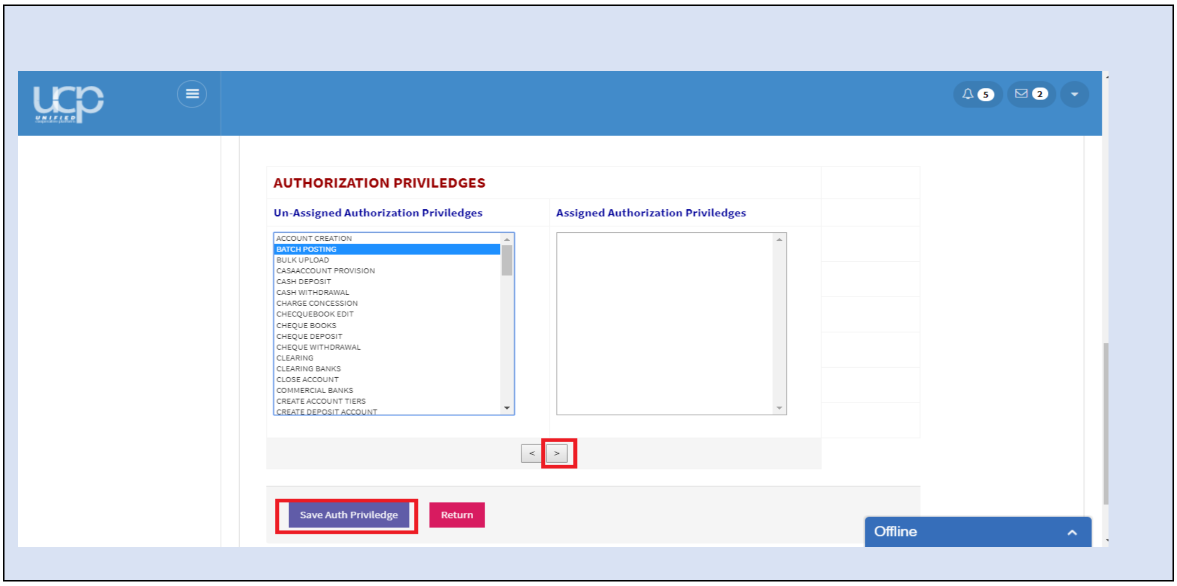
3. Select the Data Capture Privilege(s) for the role and click the **Right Arrow** button > to assign to the role. The **Left Arrow** button < can also be used to unassign selected Data Capture Privilege(s):



4. Select checkboxes if applicable) and click on the **Save Record** button:

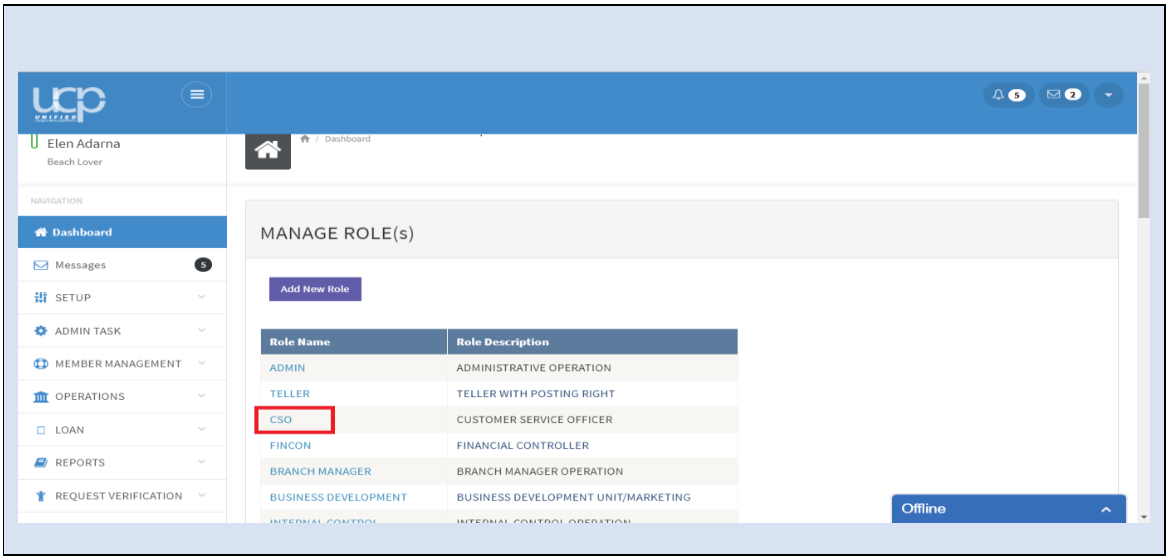


5. If the **Can Authorise** checkbox was selected, select the Authorisation Privilege(s) for the role and click the **Right Arrow** button  to assign to the role. The **Left Arrow** button  can also be used to unassign selected Authorisation Privilege(s). Click the **Save Auth Priviledge** button to save:

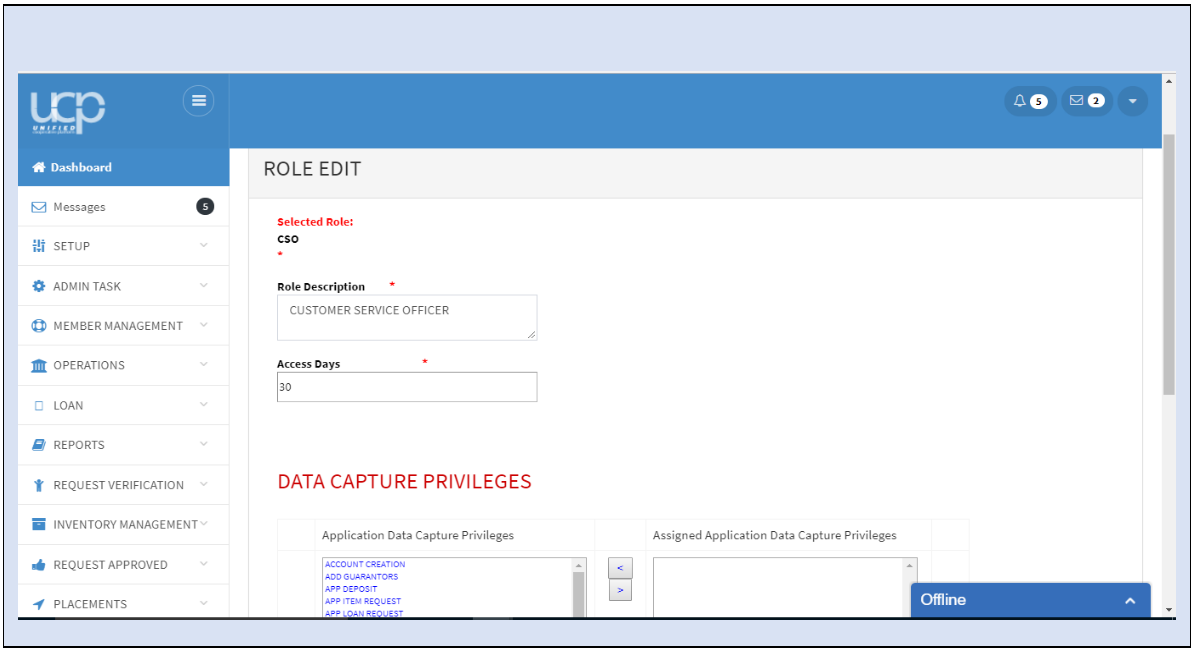


6.2.2. Edit Role

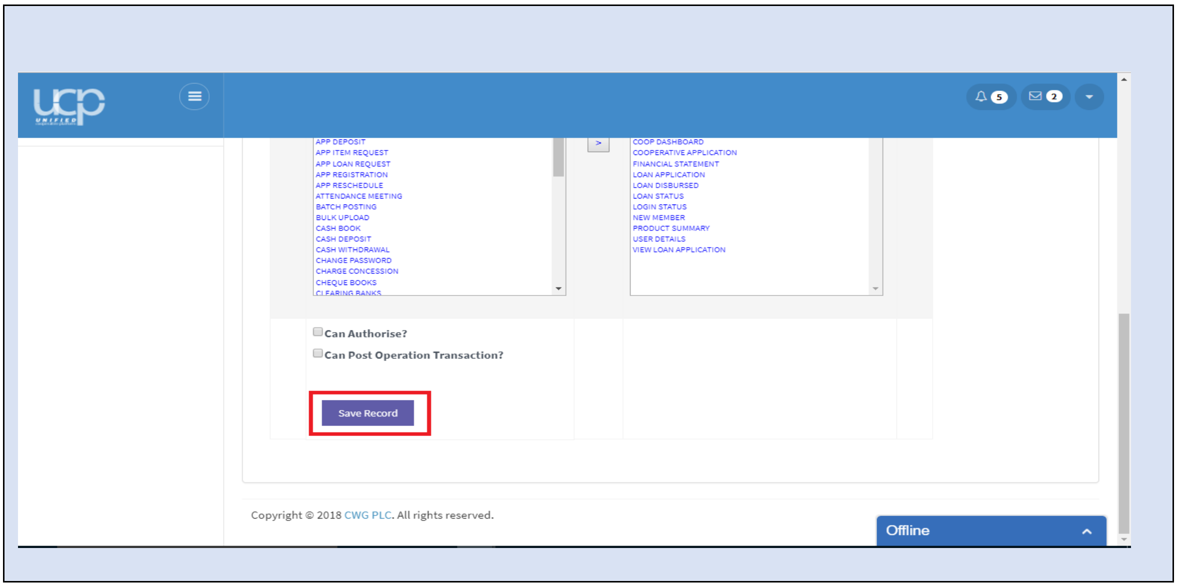
1. From the Manage Role(s) page, click on the particular user role to be edited:



2. Edit the role as required:

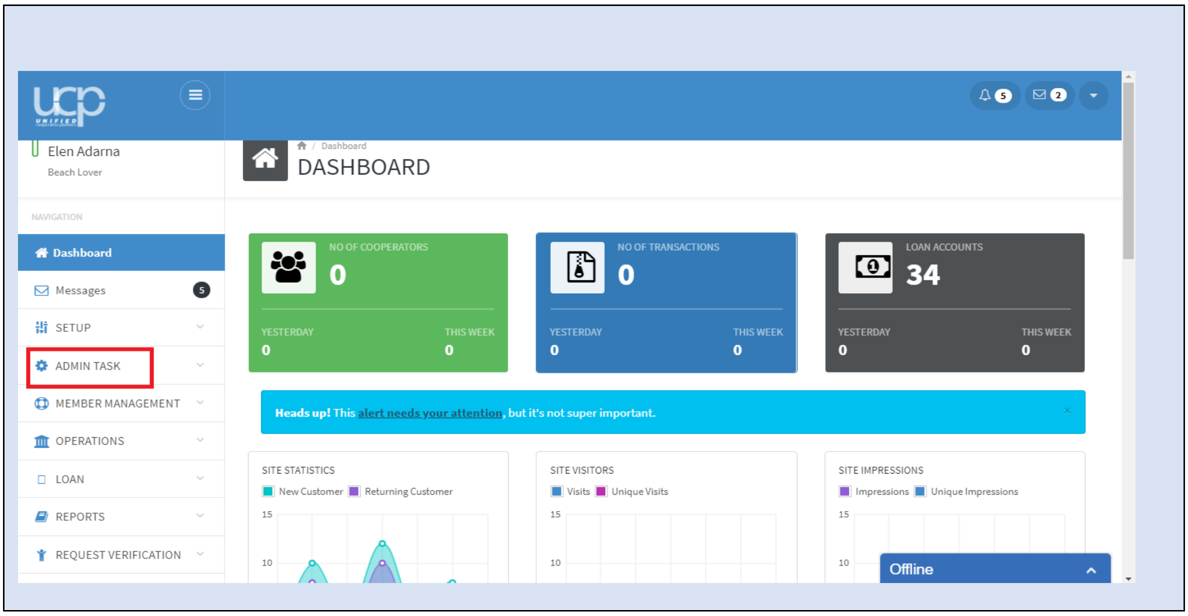


3. Click on the **Save Record** button:

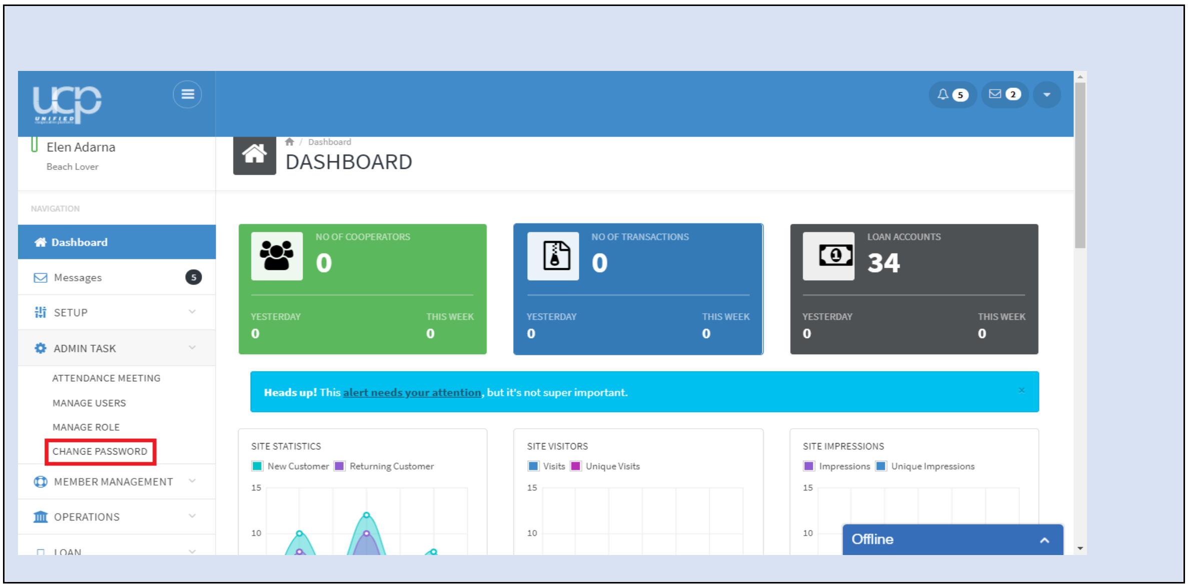


6.3. Change Password

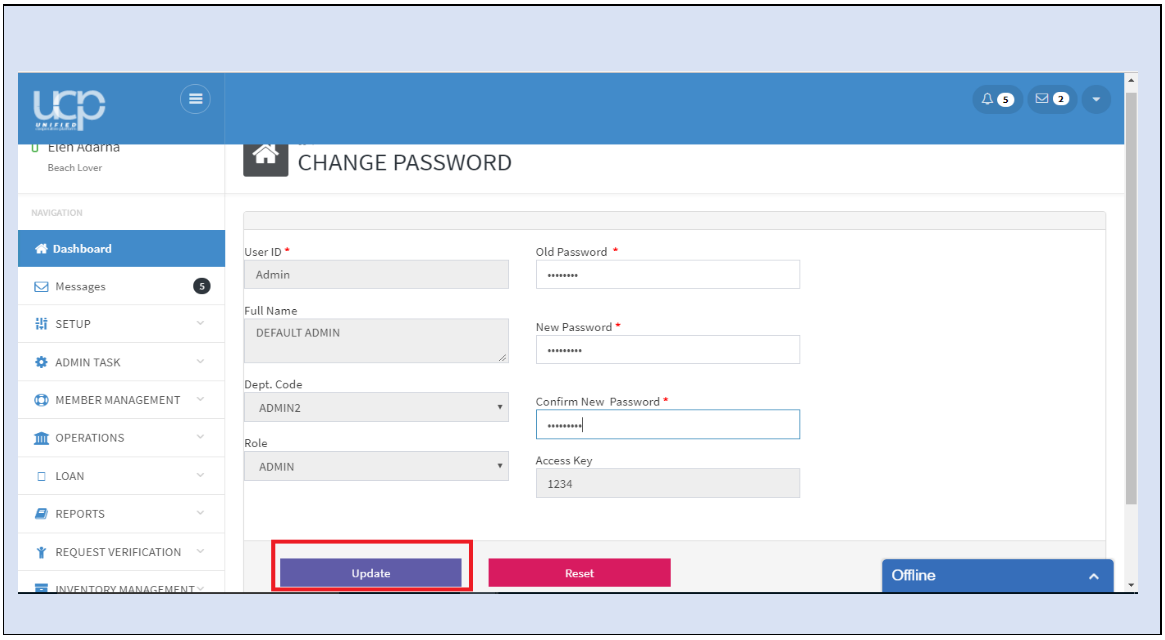
1. Login and click on the **Admin Task** Menu:



4. Click on the **Change Password** Sub menu:



6. The Change Password page is displayed. Enter the old password and new password. Confirm the new password and click on the **Update** button:

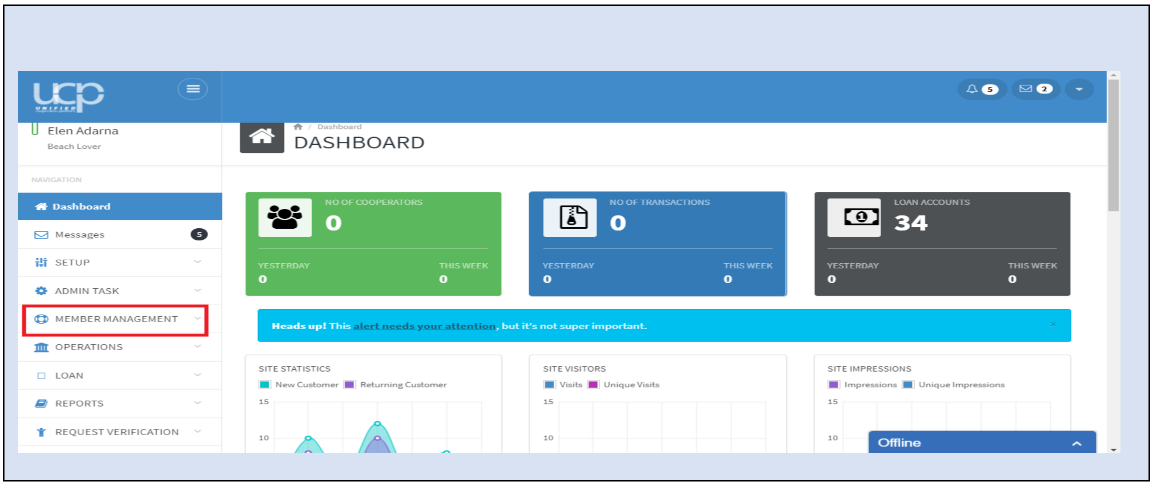


7. Member Management

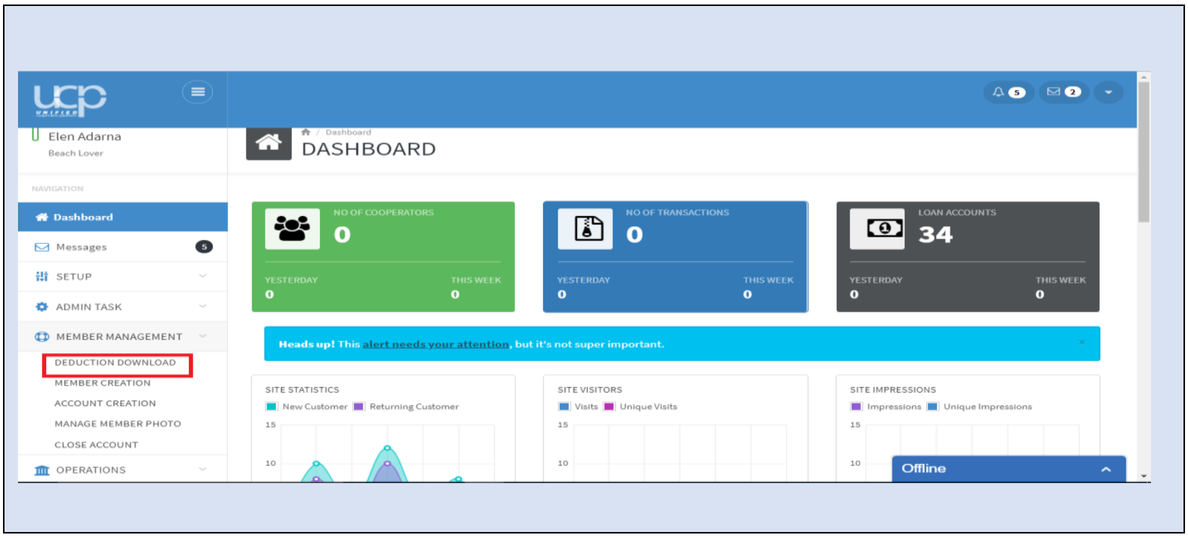
Members are managed under this menu. Functions like Deduction download and Member creation are carried out.

7.1. Deduction Download

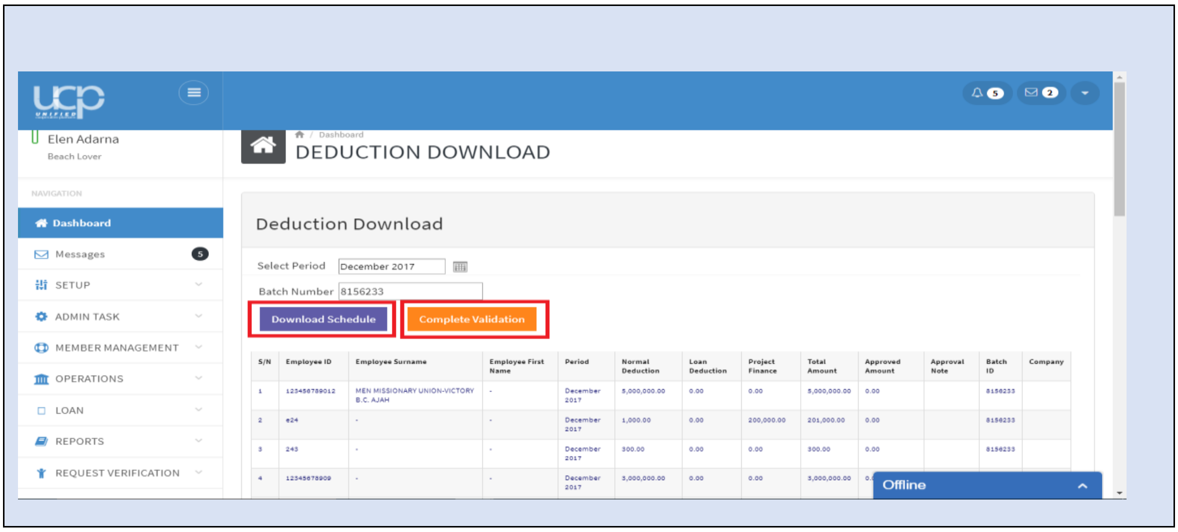
1. Login and click on the **Member Management** Menu:



2. Click on the **Deduction Download** Sub menu:

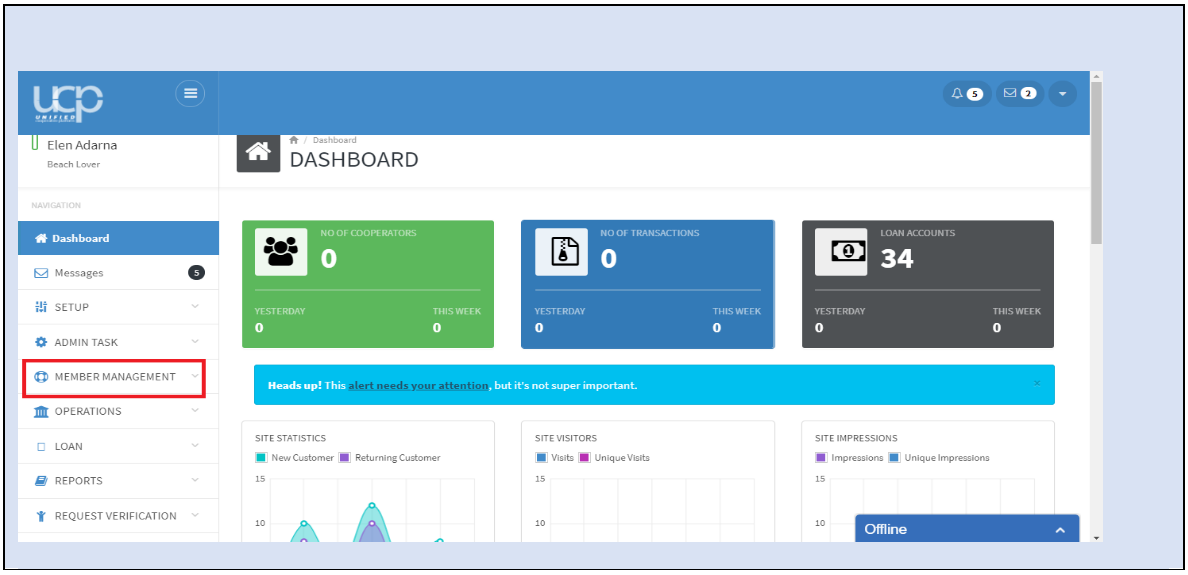


3. The Deduction download page is displayed. Select Period. The Deduction Schedule is displayed. Click the **Download Schedule** button to download the schedule and click the **Complete Validation** button to complete validation:

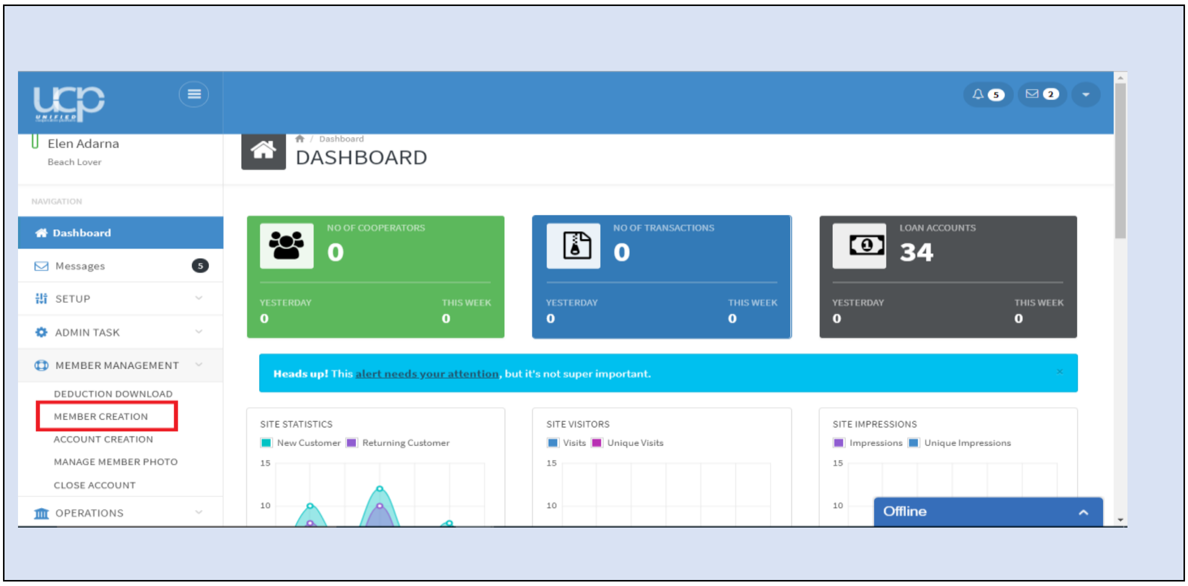


7.2. Member Creation

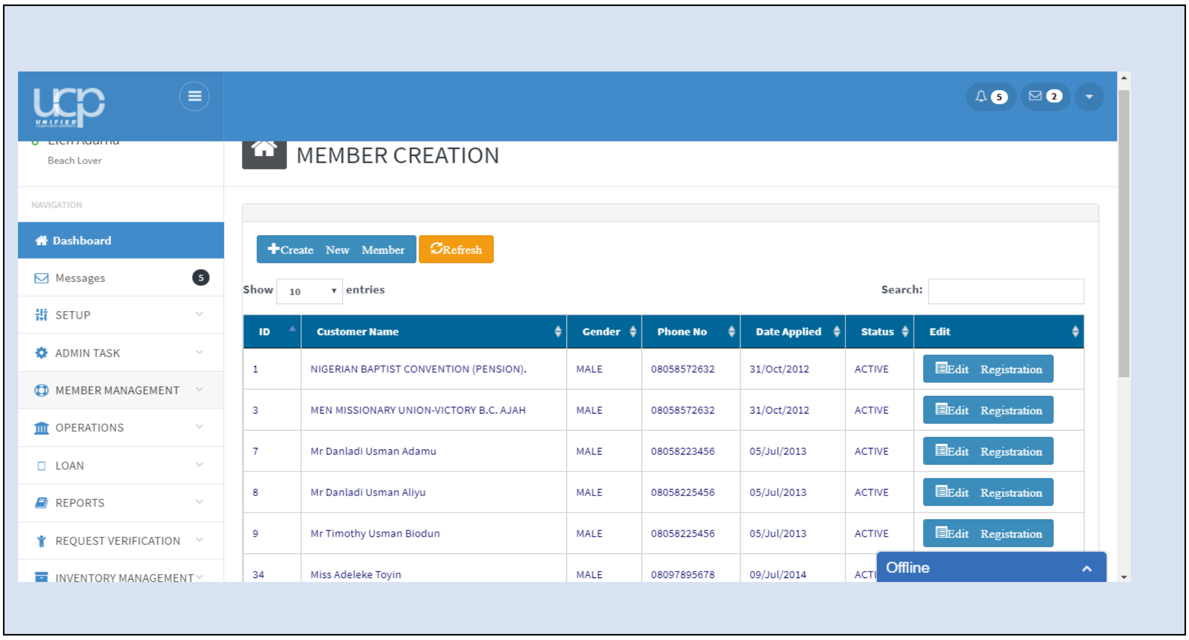
1. Login and click on the **Member Management** Menu:



2. Click on the **Member Creation** Sub menu:

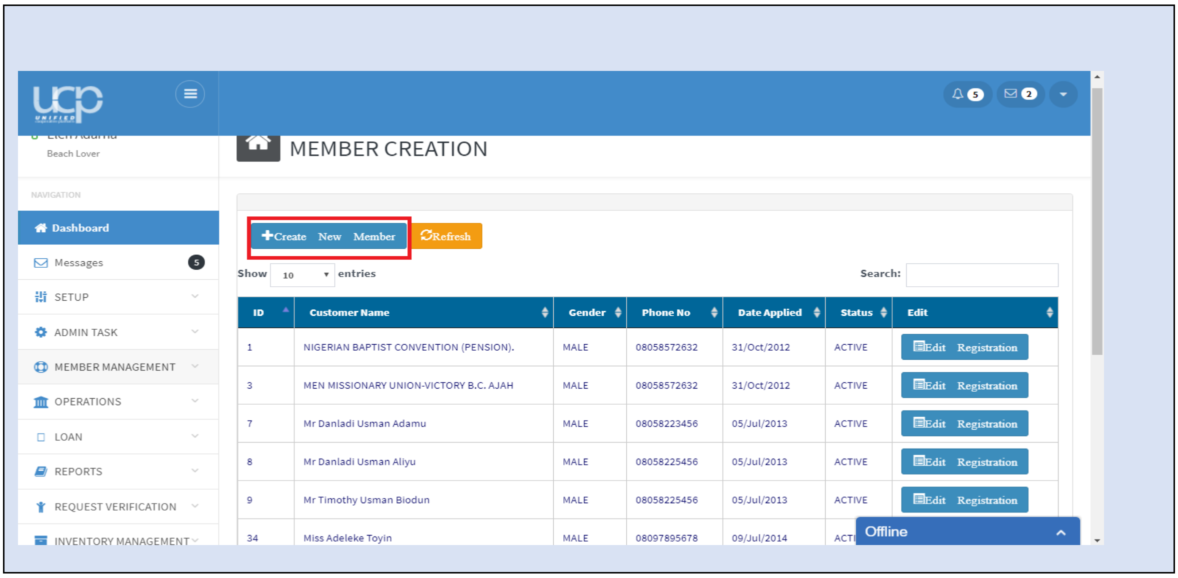


3. The Member Creation page is displayed listing the existing members:

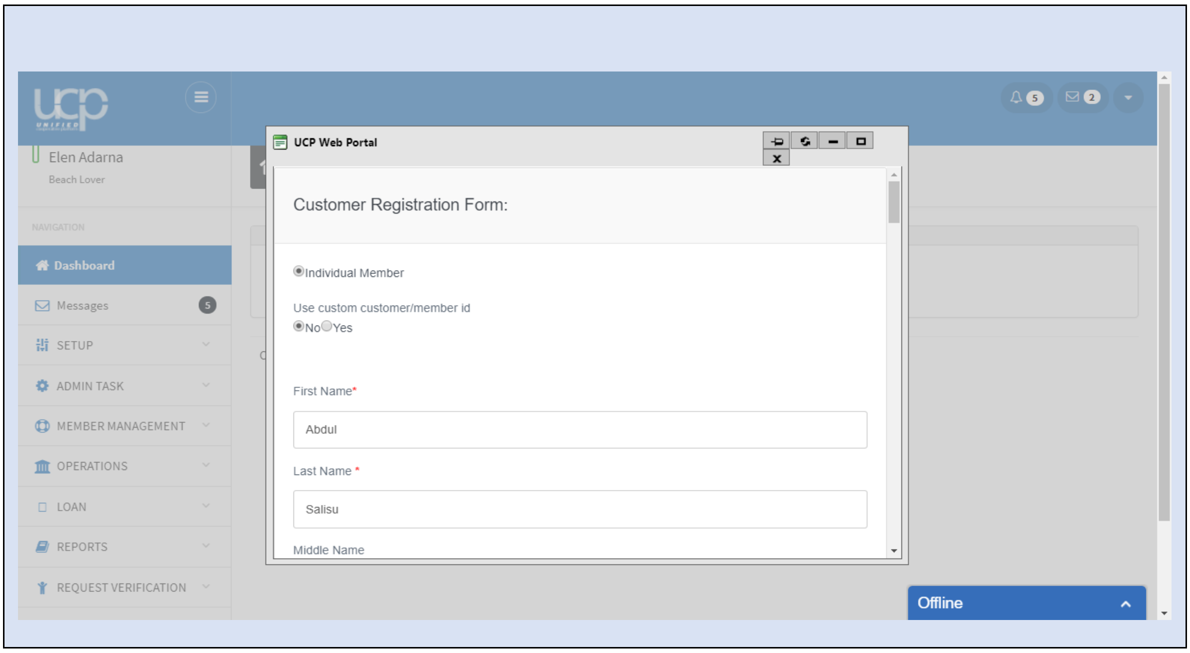


7.2.1. Create New Member

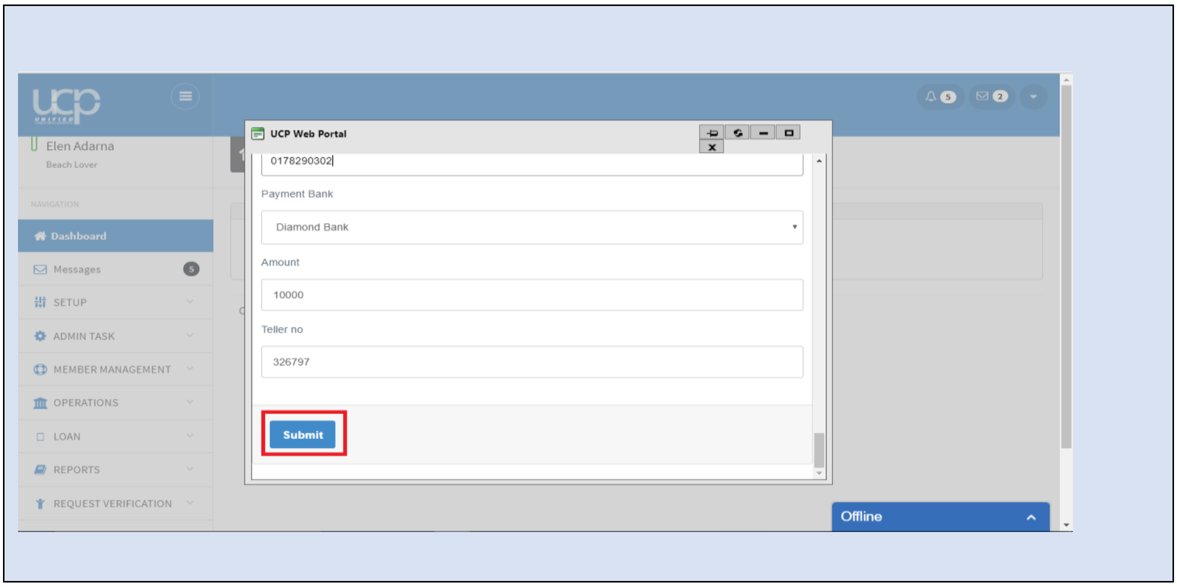
1. From the Member Creation page, click on the **Create New Member** button:



2. Provide the required information:

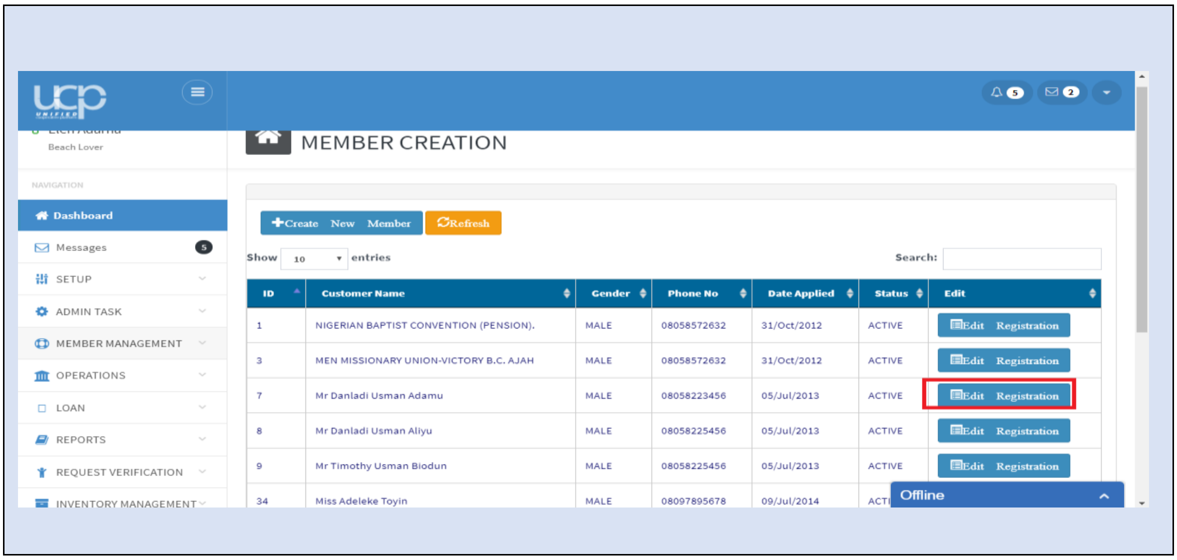


3. Click on the **Submit** button:

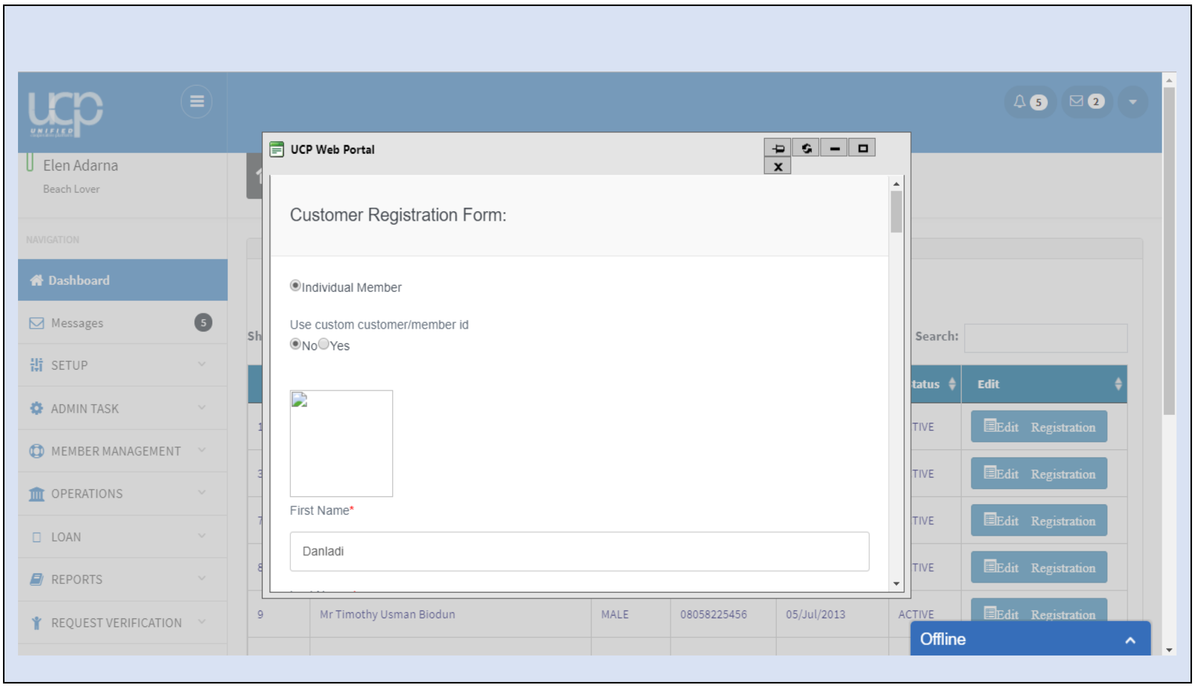


7.2.2. Edit Registration

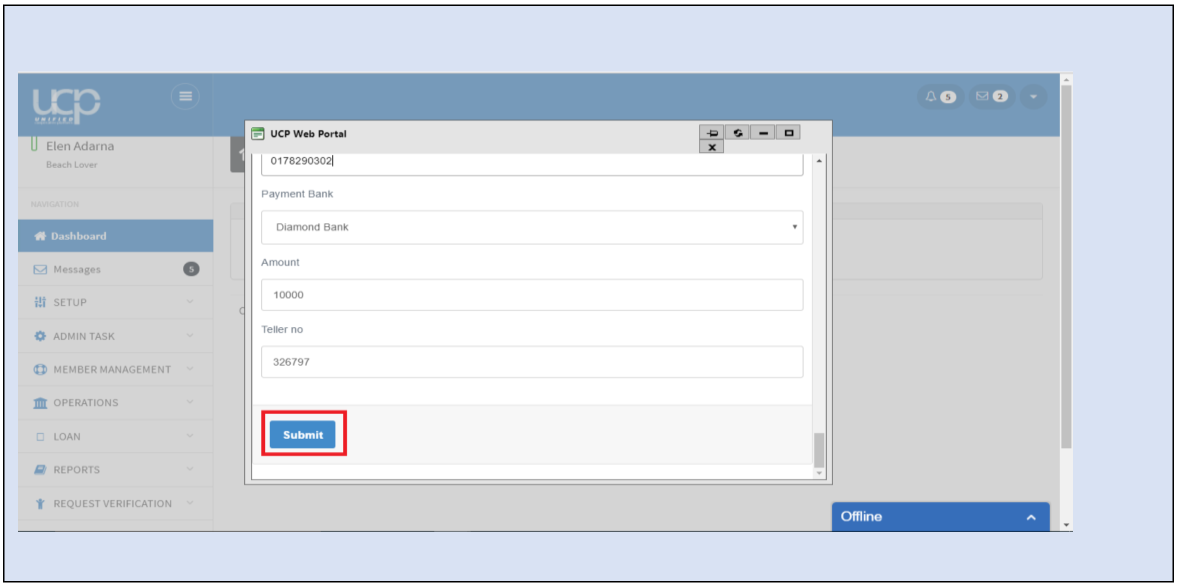
1. From the Member Creation page, click on the **Edit Registration** button for the particular member registration to be edited:



2. Edit the registration as required:



3. Click on the **Submit** button:

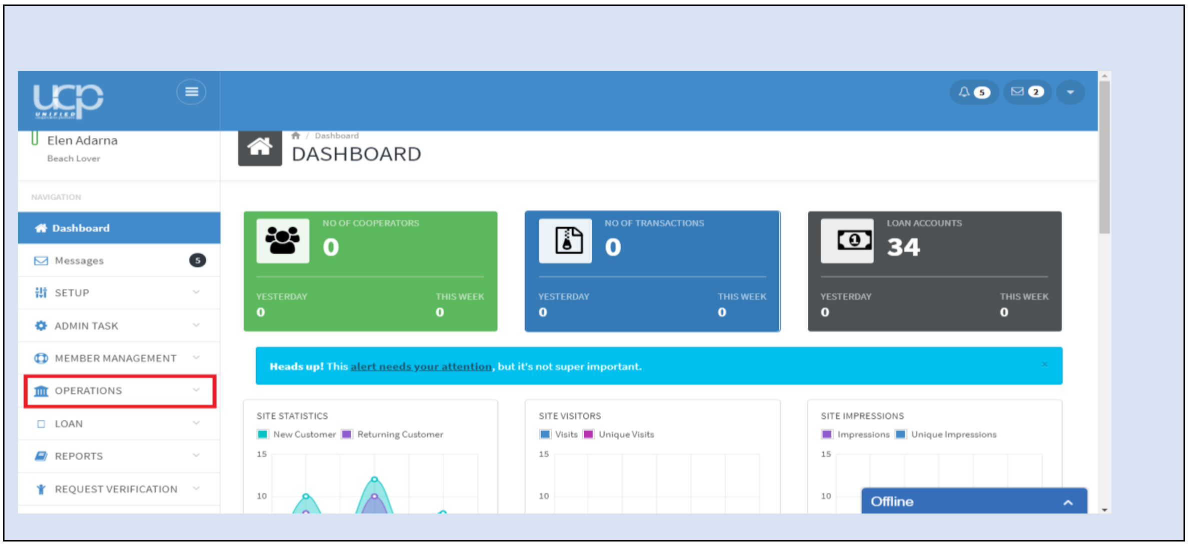


8. Operations

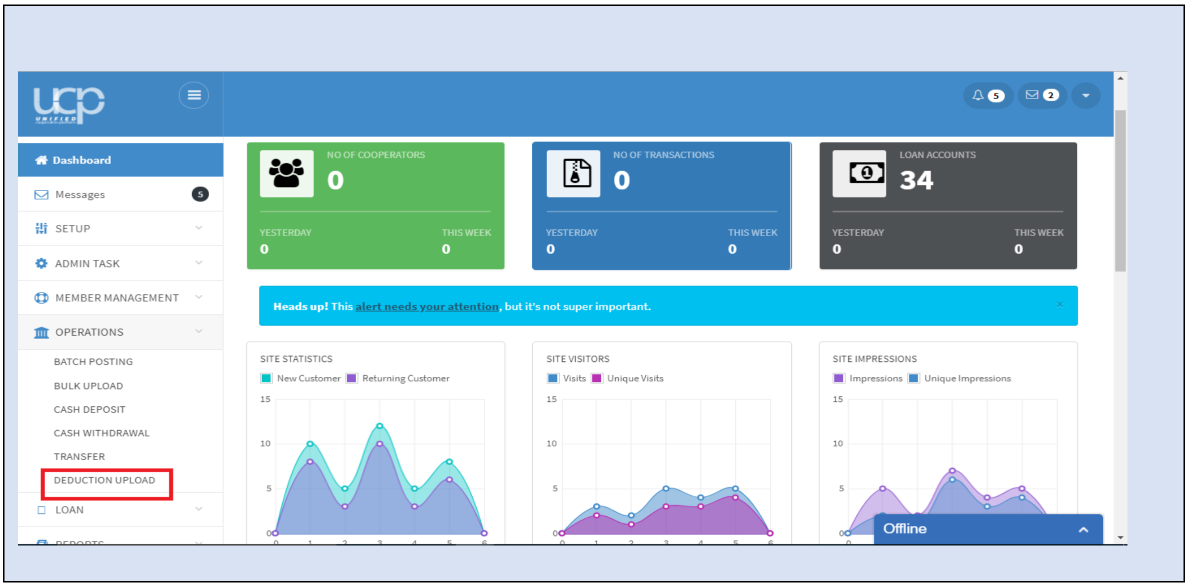
Operation functions are carried out under this menu.

8.1. Deduction Upload

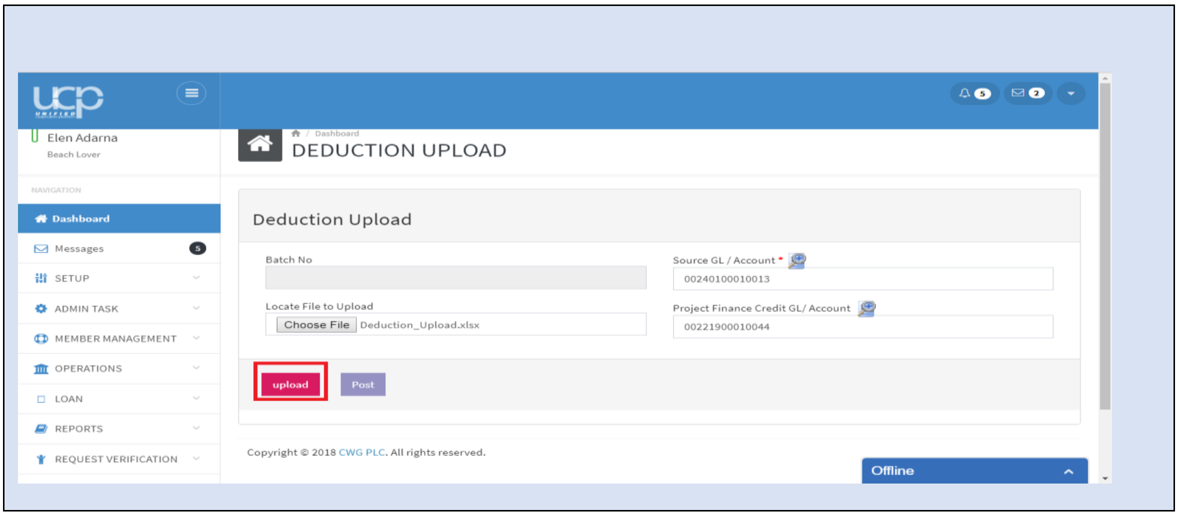
1. Login and click on the **Operations** Menu:



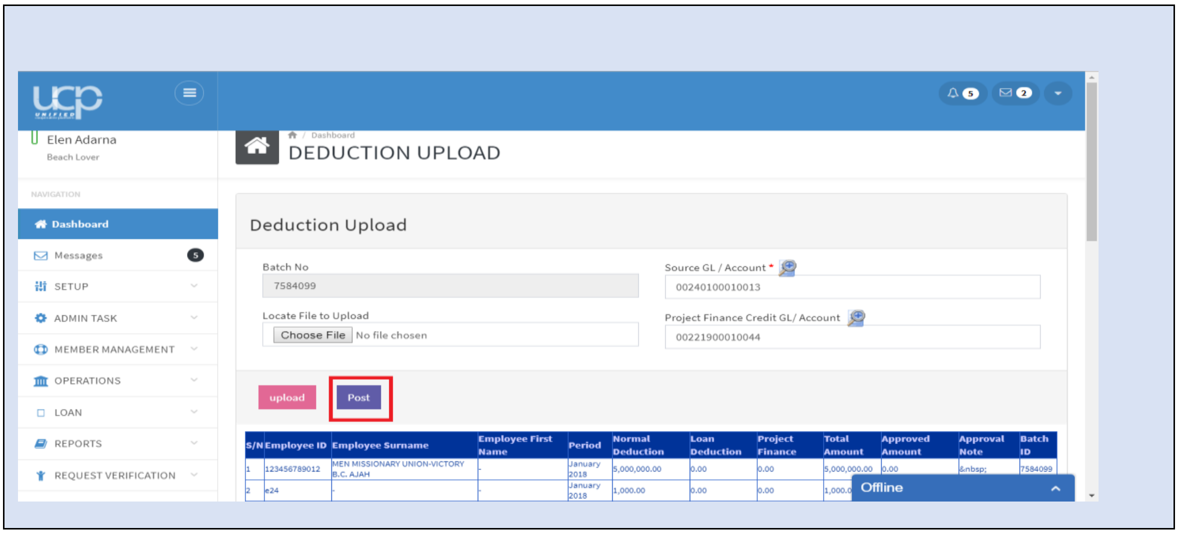
2. Click on the **Deduction Upload** Sub menu:



3. The Deduction upload page is displayed. Provide the required GLs and upload file. Click on the **Upload** button:



4. The Deduction Schedule is uploaded and displayed. Click on the **Post** button to post:

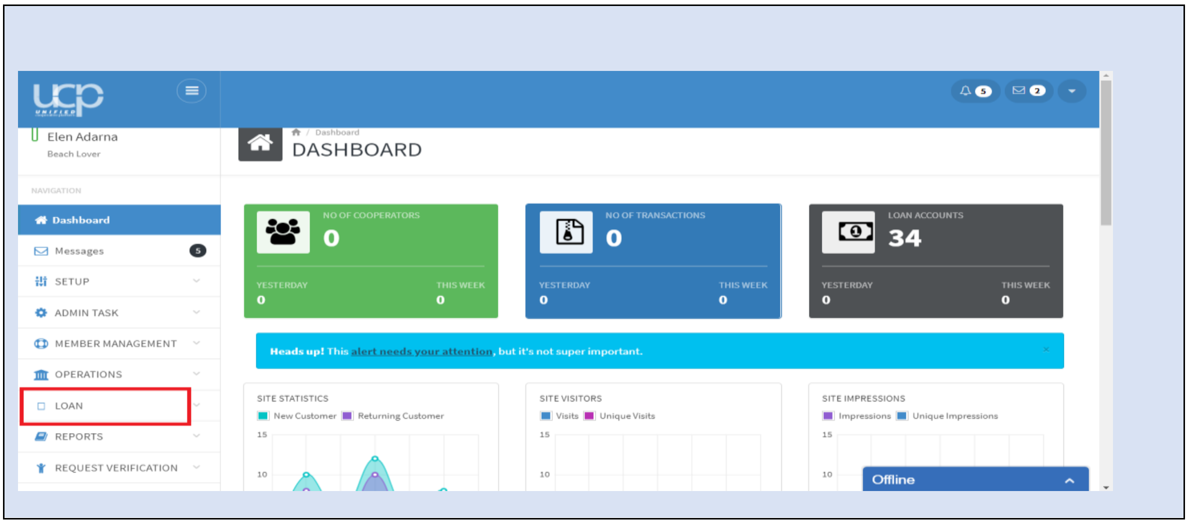


9. Loan

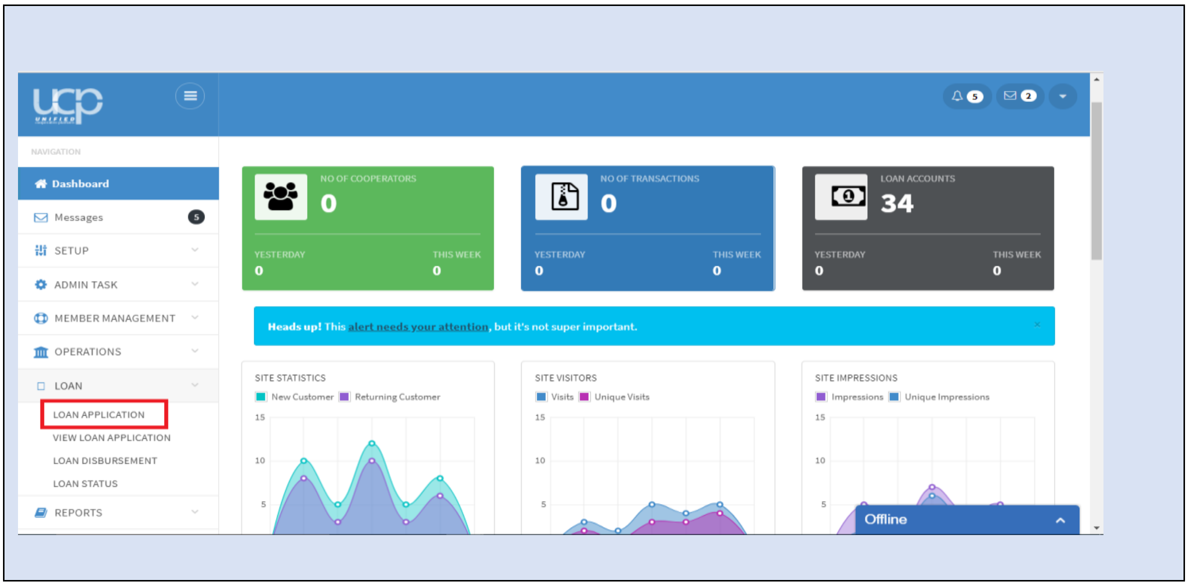
Using this menu Loan application can be made and funds disbursed for the loans.

9.1. Loan Application

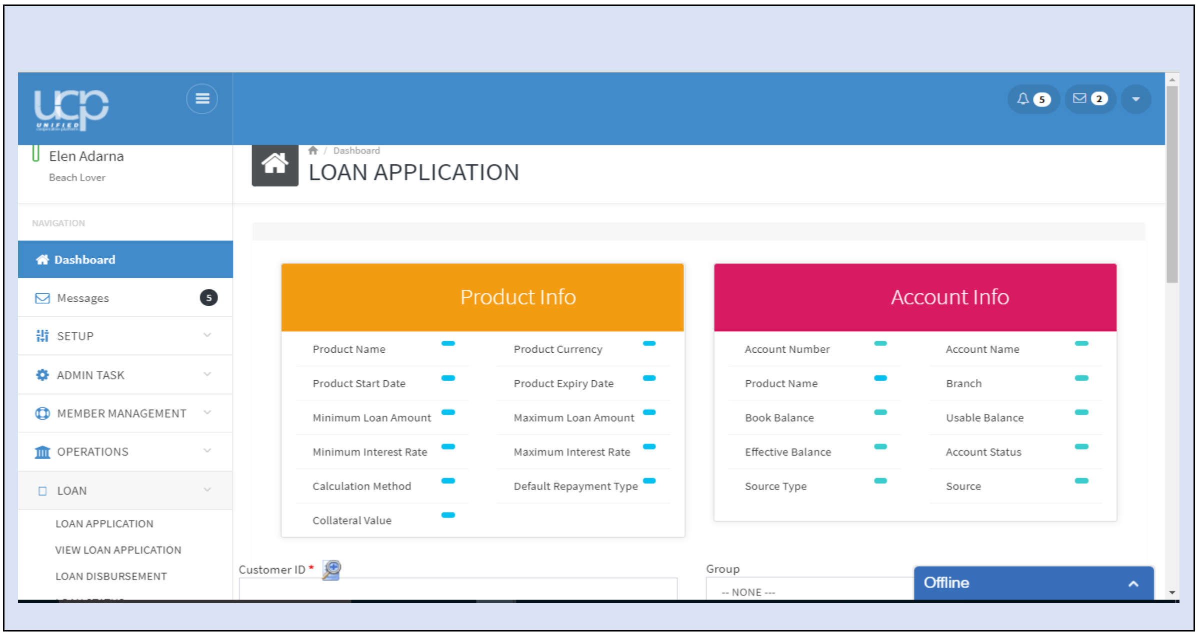
1. Login and click on the **Loan** Menu:



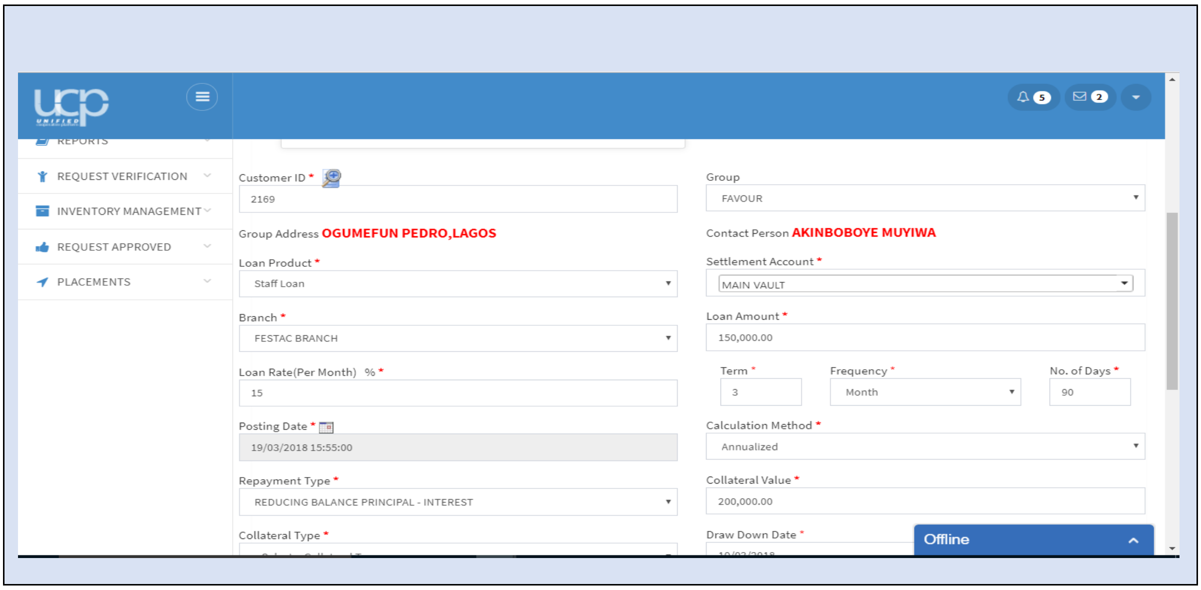
2. Click on the **Loan Application** Sub menu:



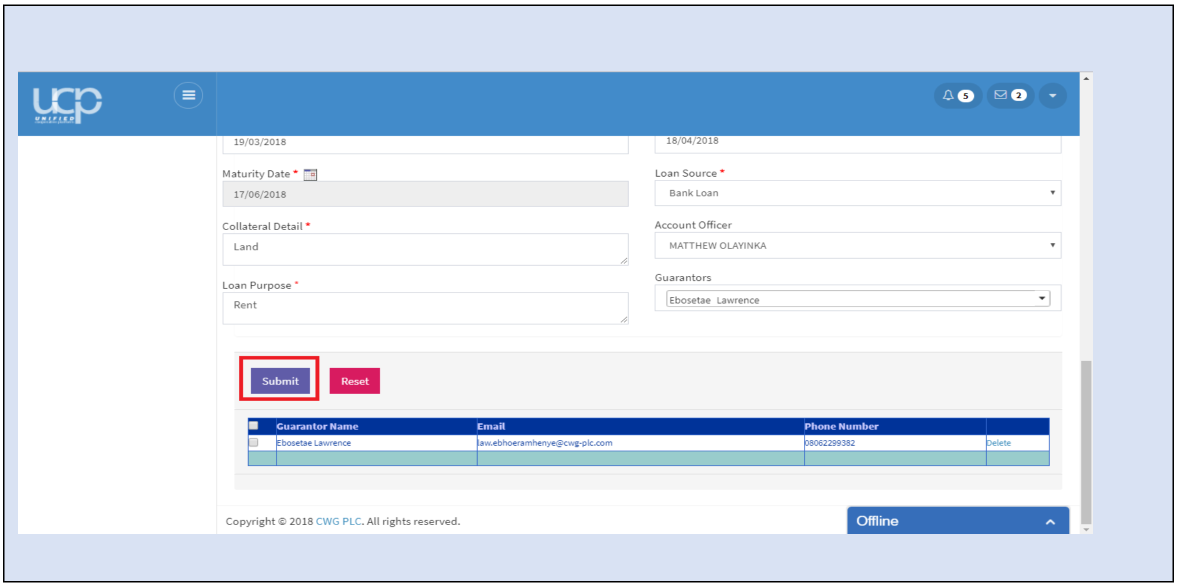
3. The Loan Application page is displayed:



4. Provide the required information:

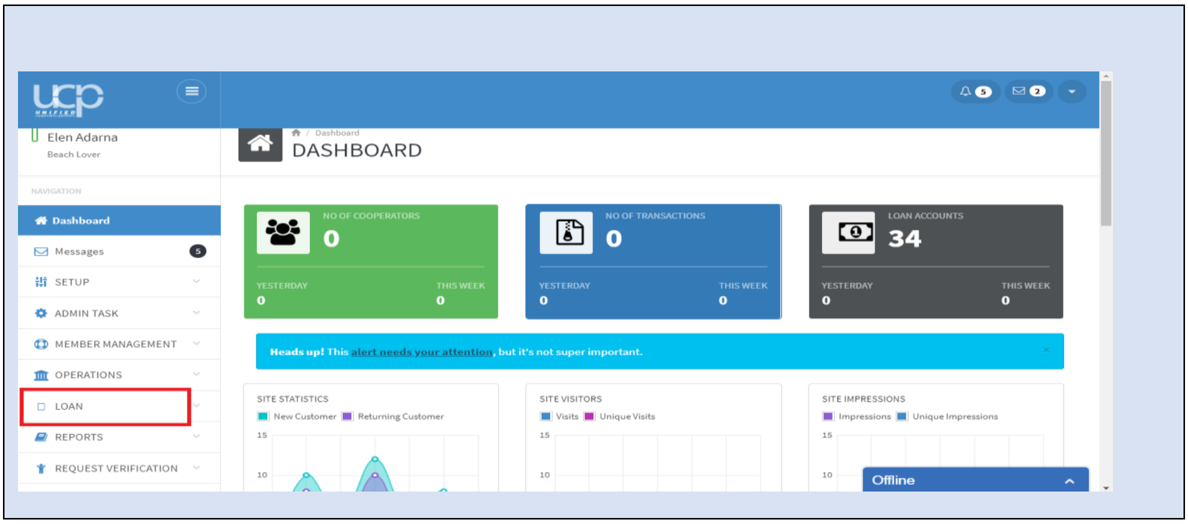


5. Click on the **Submit** button:

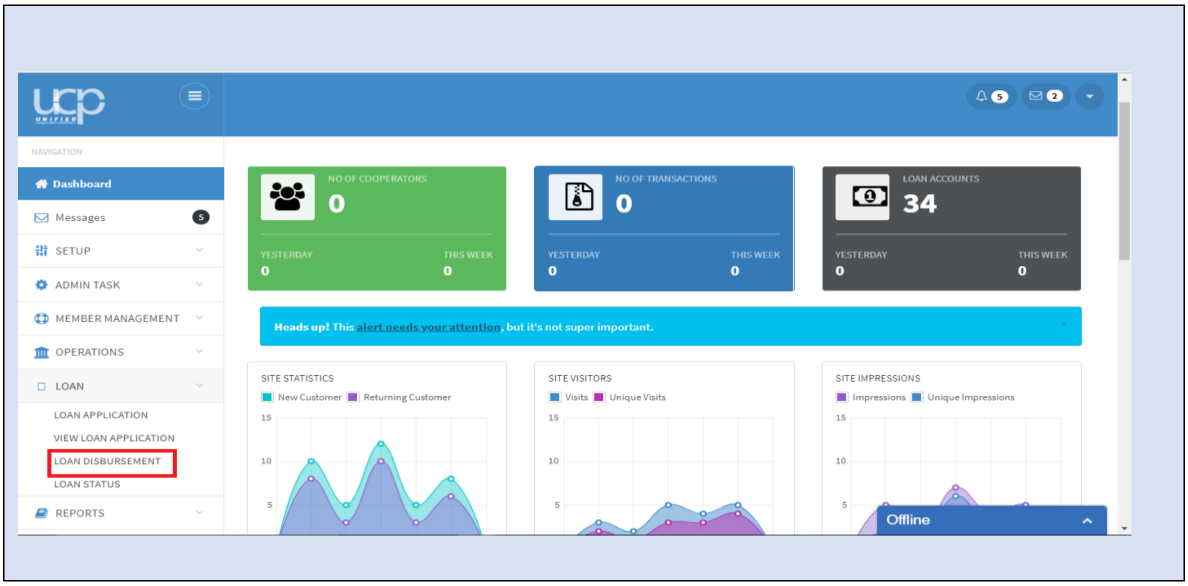


9.2. Loan Disbursement

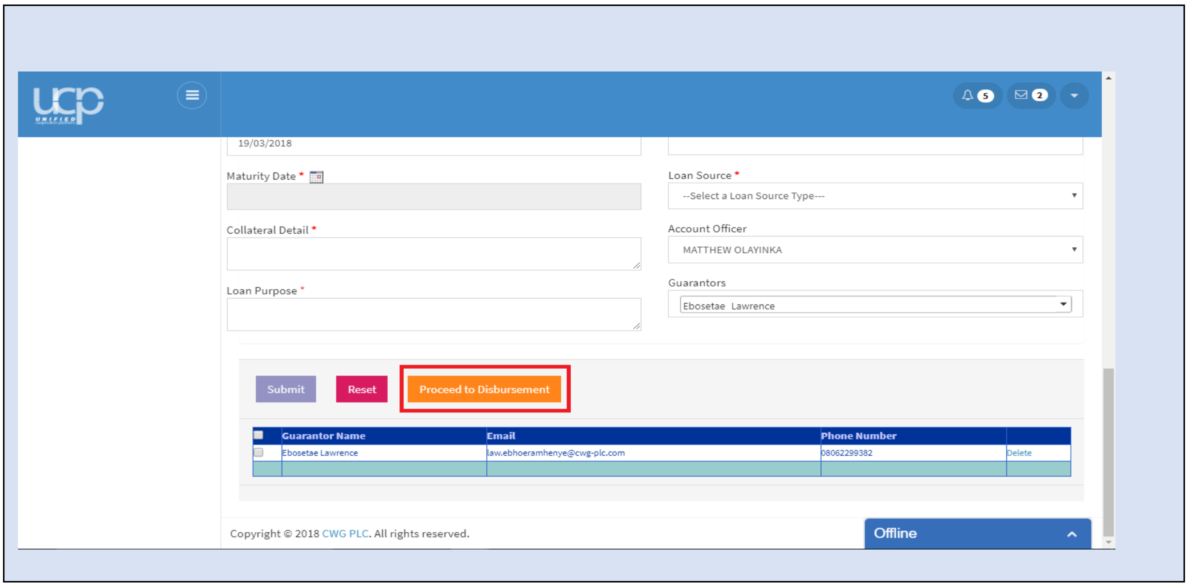
1. Login and click on the **Loan** Menu:



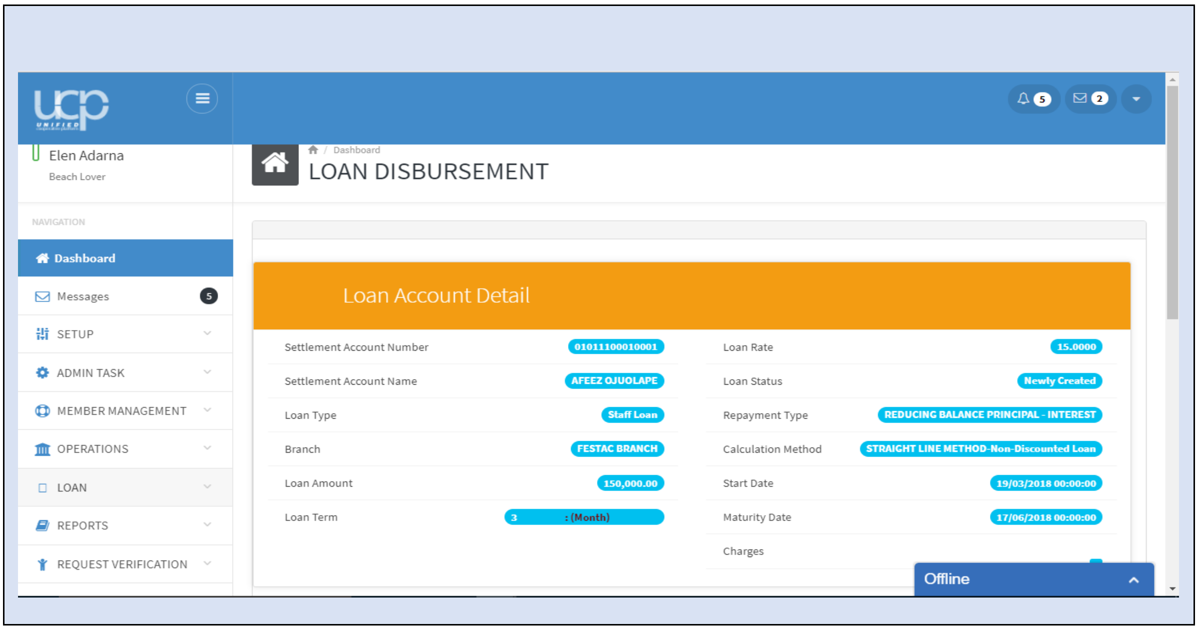
2. Click on the **Loan Disbursement** Sub menu:



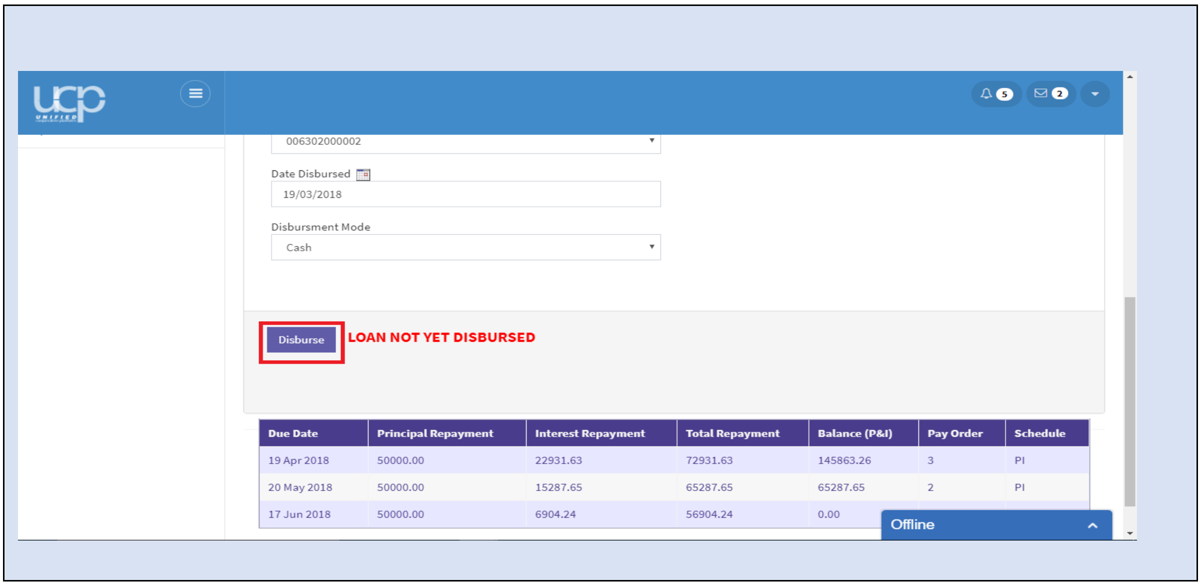
3. A Loan can also be disbursed by clicking on the **Proceed to Disbursement** button on the Loan Application after the Loan application process:



4. The Loan Disbursement page is displayed:



5. Provide the required Loan information. The Loan repayment schedule is displayed. Click the **Disburse** button to disburse loan:

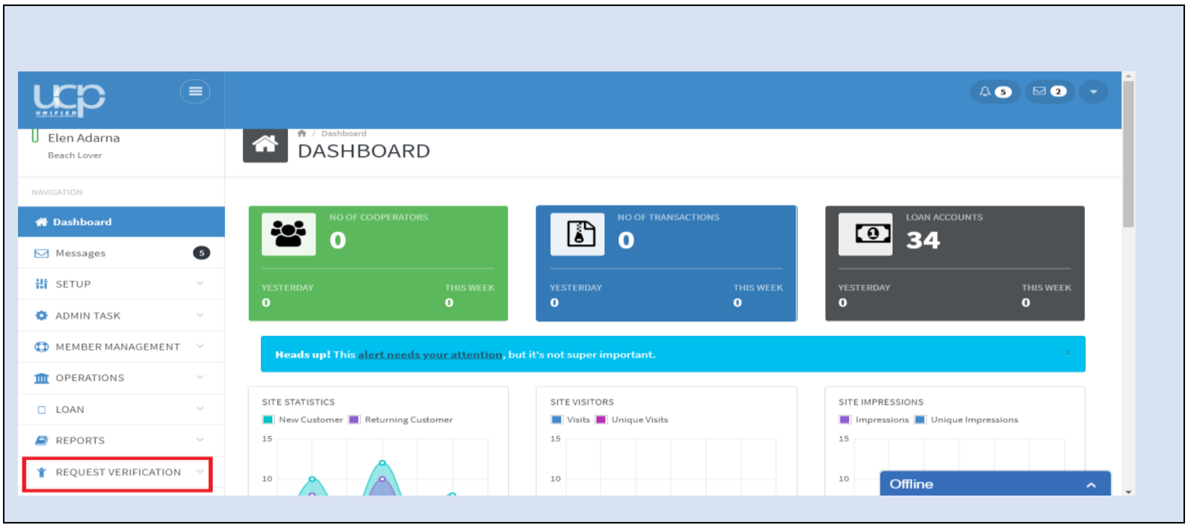


10. Request Verification

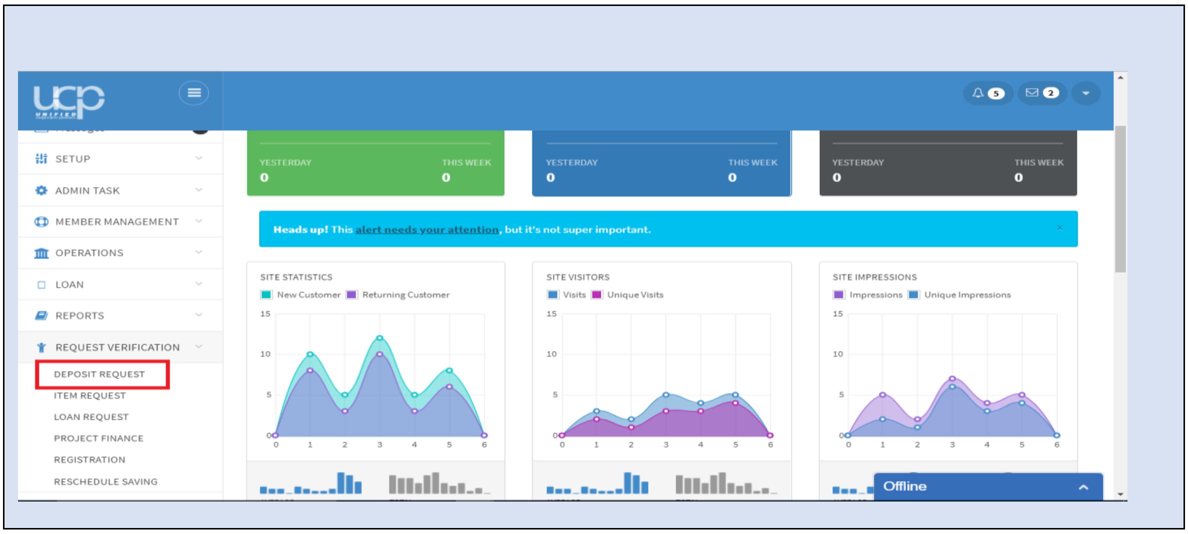
This is the menu where requests like Loan, deposit and registration requests can be reviewed and approved or disapproved.

10.1. Deposit Request

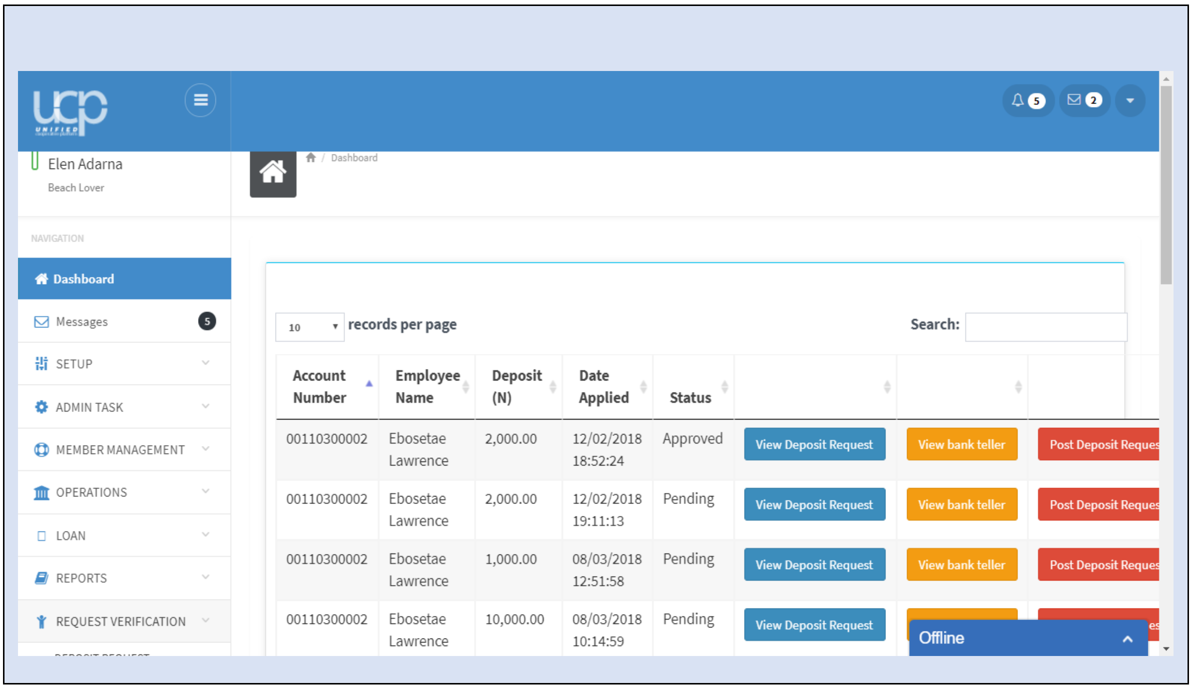
1. Login and click on the **Request Verification** Menu:



2. Click on the **Deposit Request** Sub menu:

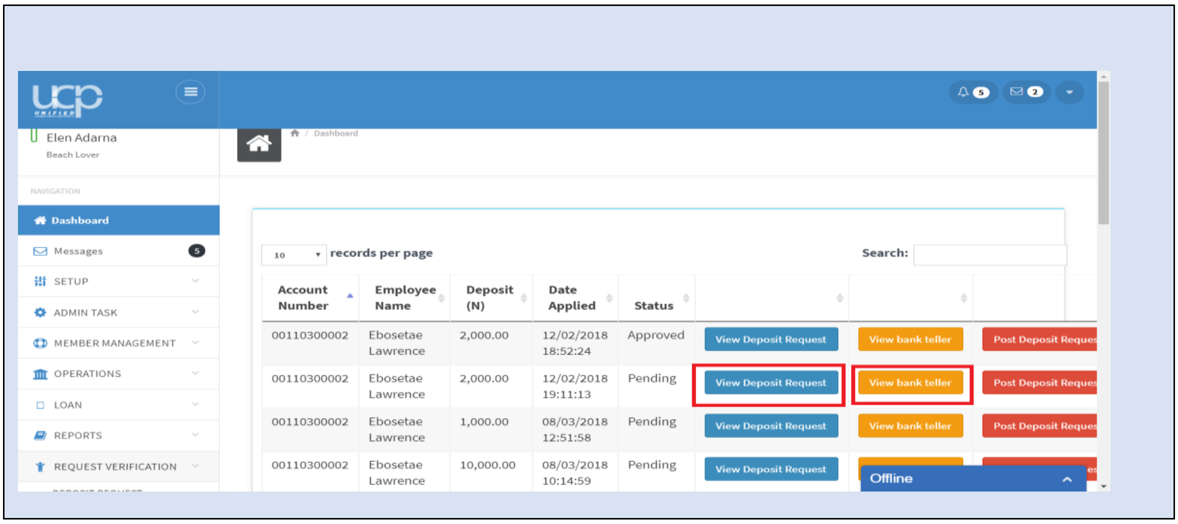


3. The Deposit Request page is displayed listing the Deposit Requests:

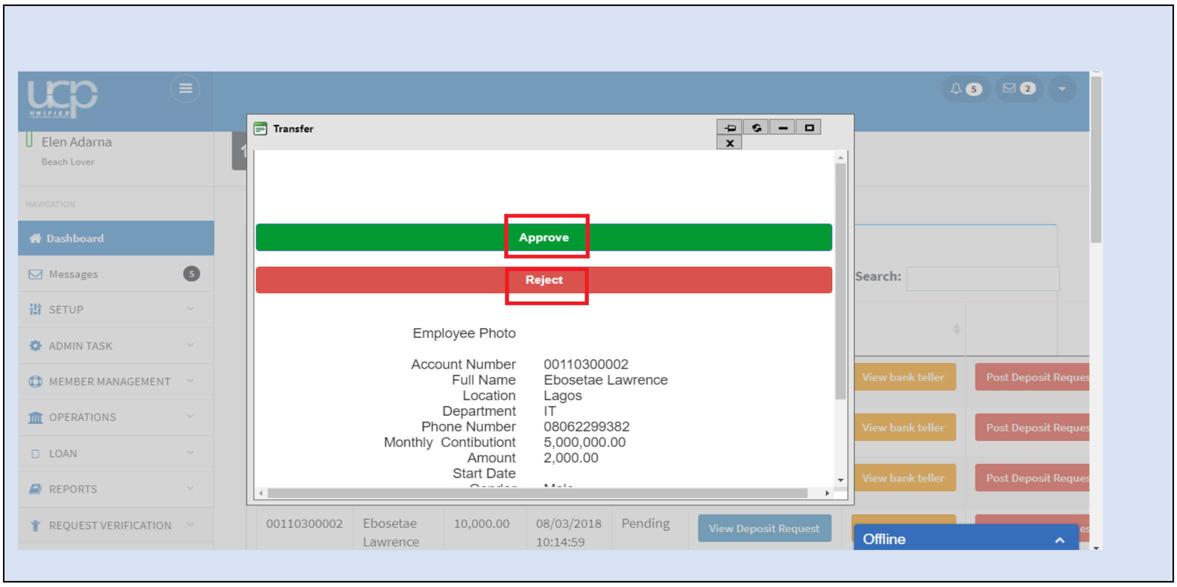


10.1.1. Approve/Reject Deposit Request

1. From the Deposit Request page, click on the **View Deposit Request** button for a particular deposit request. The **View Bank teller** button can also be clicked to view the bank teller:

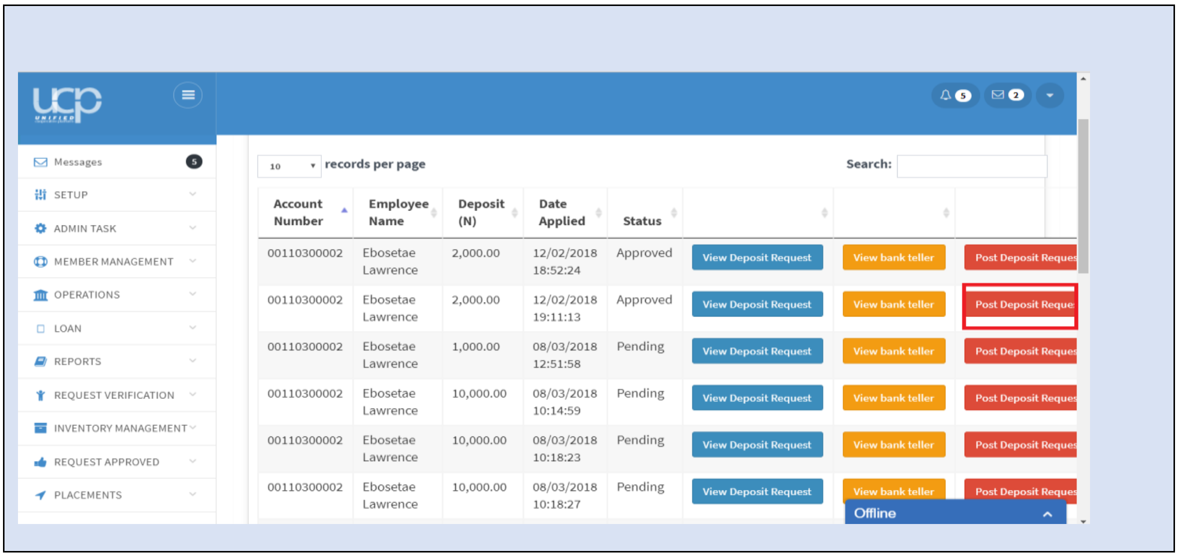


2. The Deposit request details are displayed. Click the **Approve/Reject** button to Approve/Reject request:

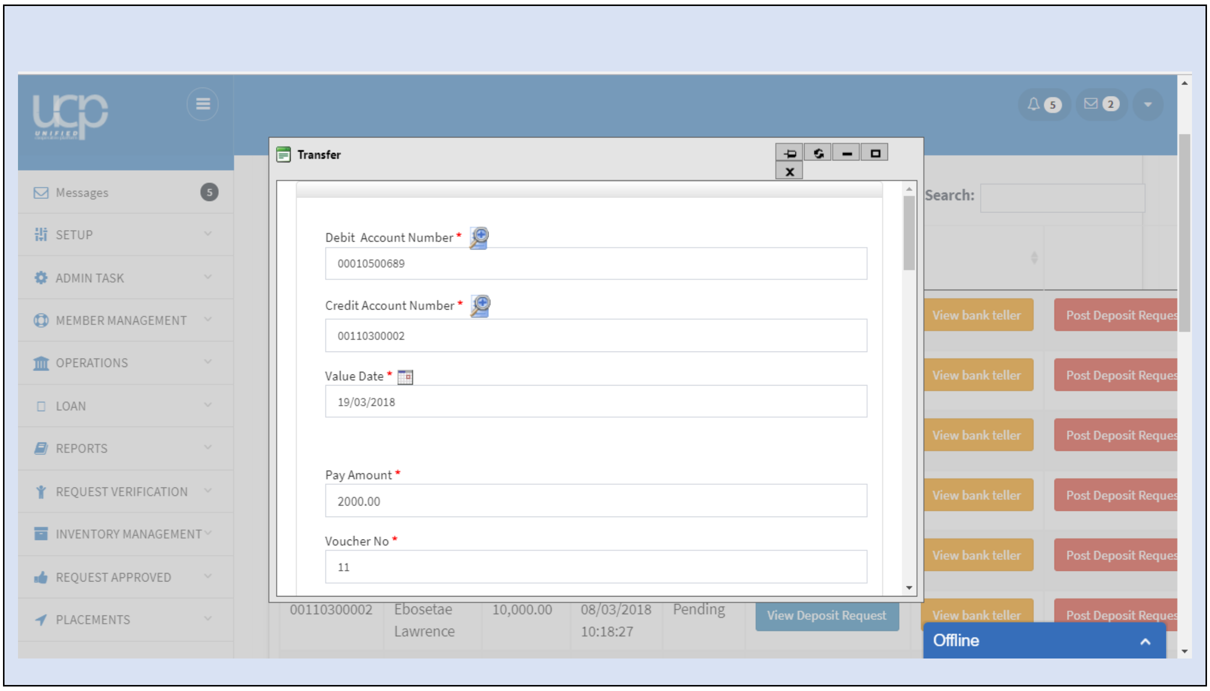


10.1.2. Post Deposit Request

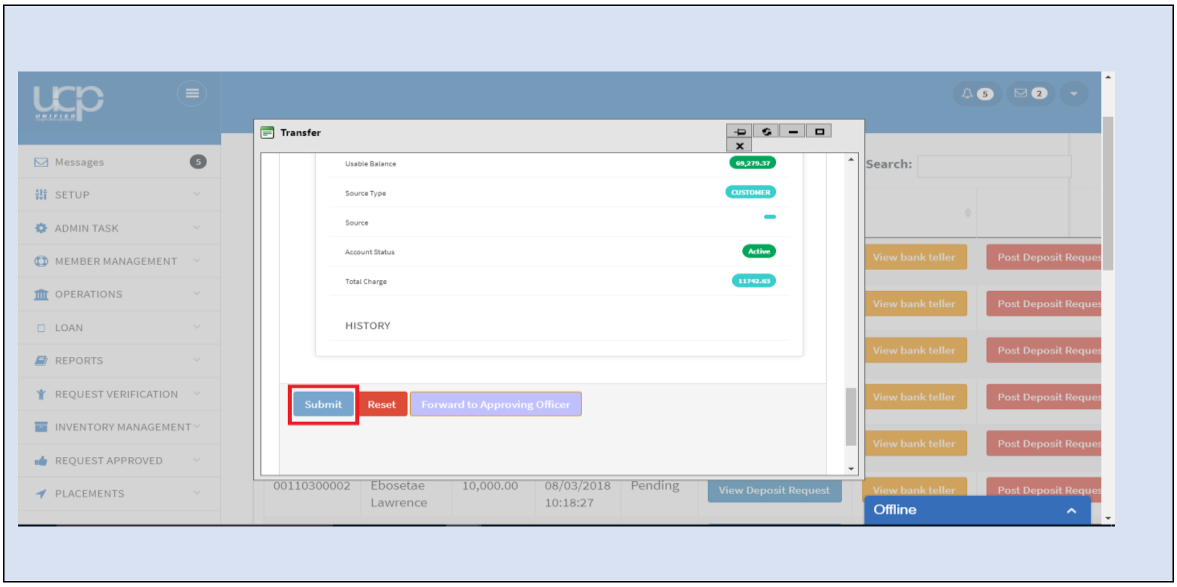
1. From the Deposit Request page, click on the **Post Deposit Request** button for a particular approved deposit request:



2. Provide the required details:

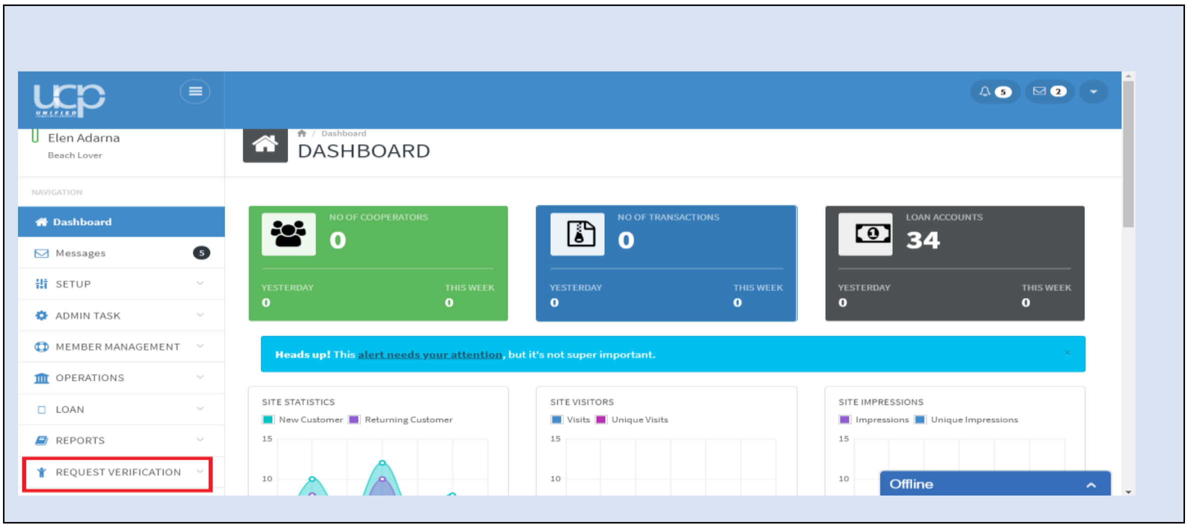


3. Click on the **Submit** button:

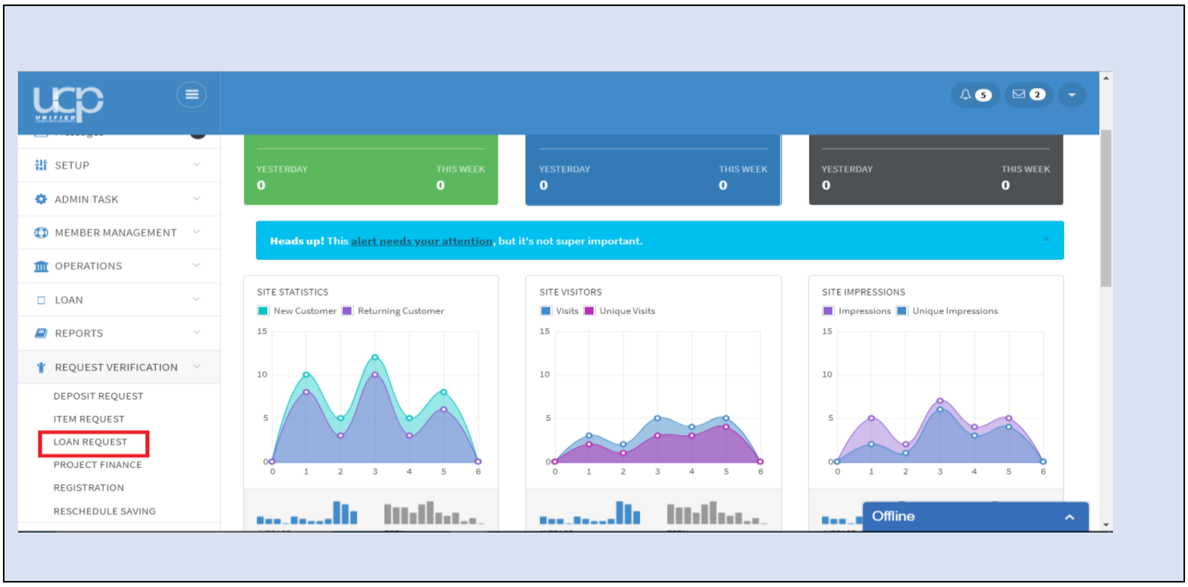


10.2. Loan Request

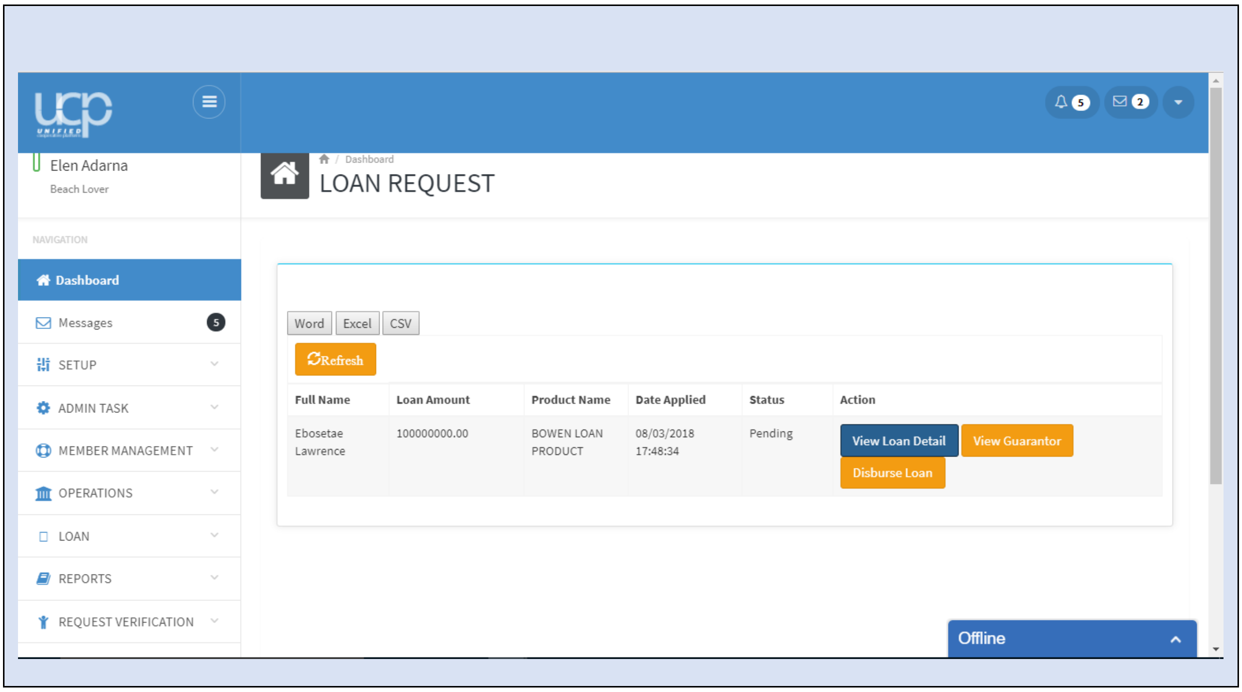
1. Login and click on the **Request Verification** Menu:



2. Click on the **Loan** Sub menu:

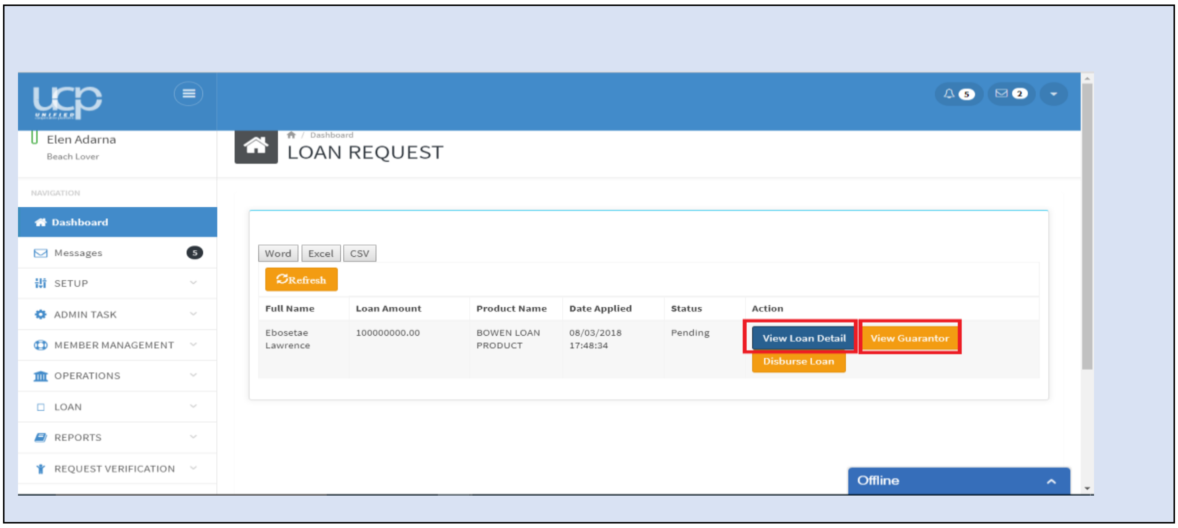


3. The Loan Request page is displayed listing the Loan Requests:

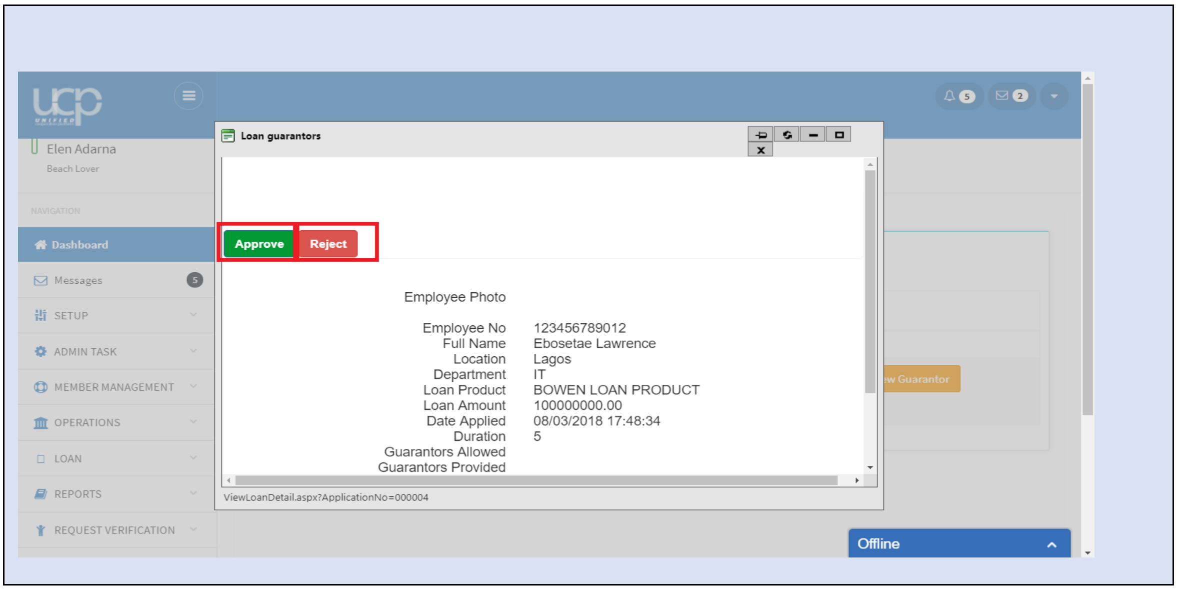


10.2.1. Approve/Reject Loan Request

1. From the Loan Request page, click on the **View Loan Detail** button for a particular Loan request. The **View Guarantor** button can also be clicked to view the guarantors:

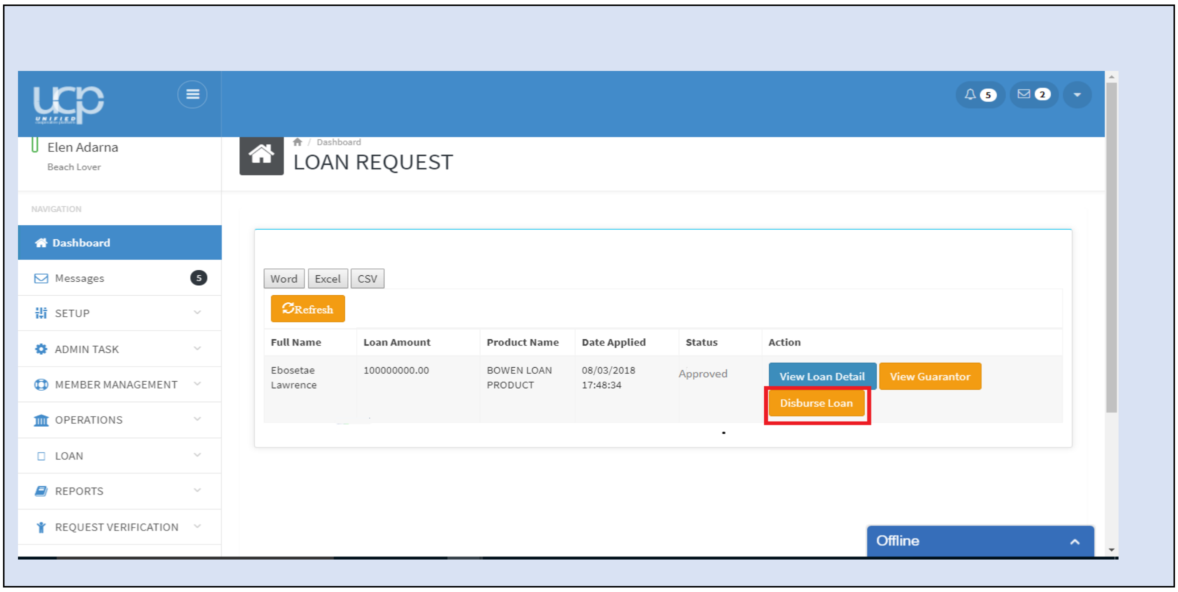


2. The Loan request details are displayed. Click the **Approve/Reject** button to Approve/Reject request:

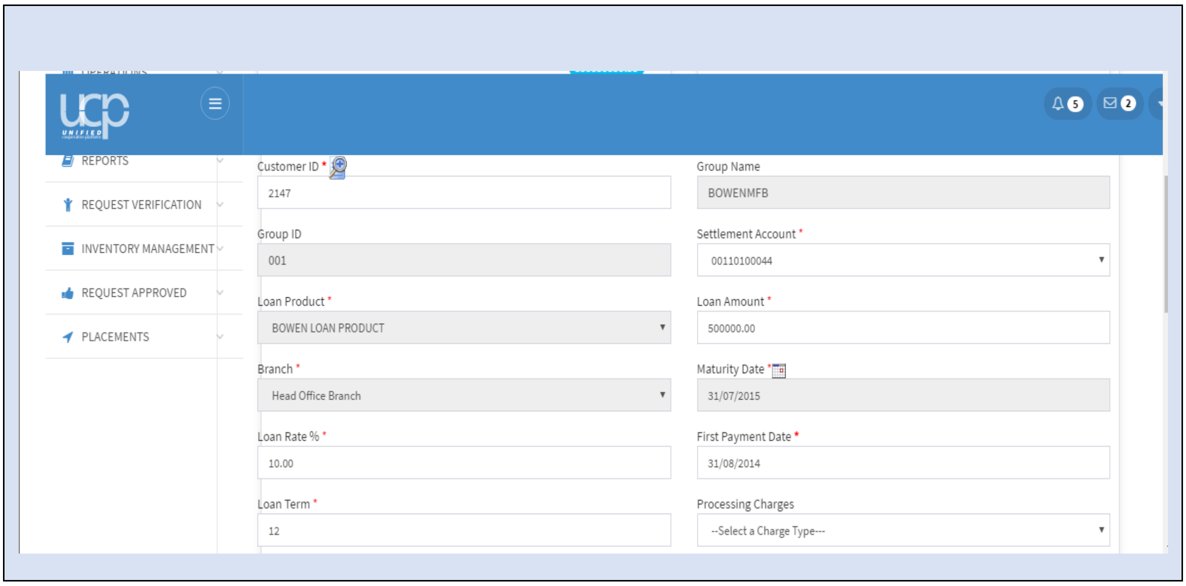


10.2.2. Disburse Loan

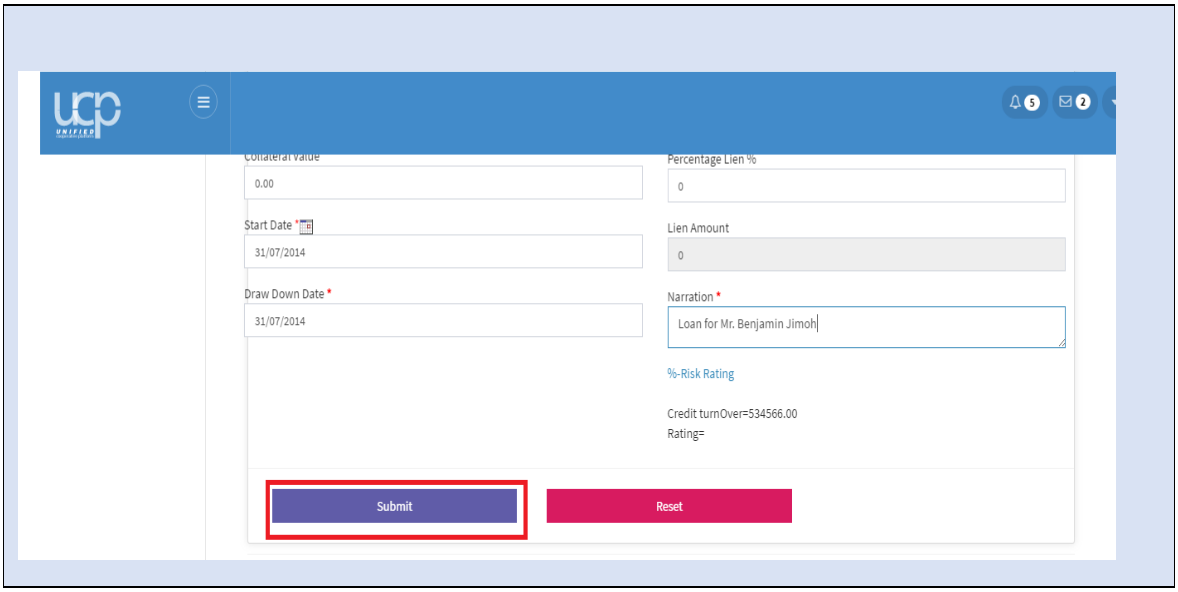
1. From the Loan Request page, click on the **Disburse Loan** button for a particular approved Loan request to disburse the loan:



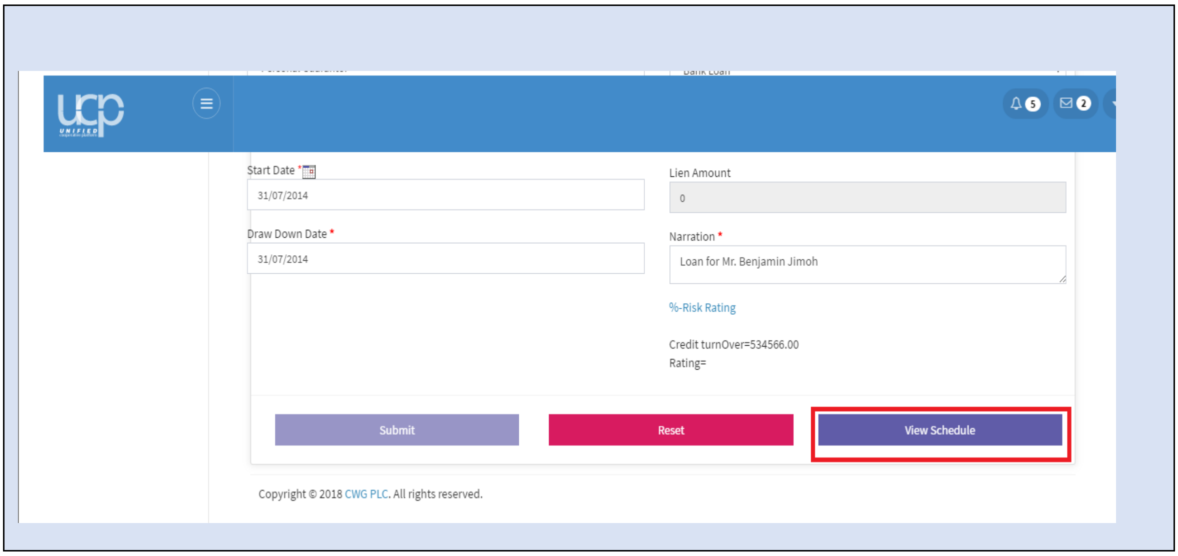
2. Provide the required details:



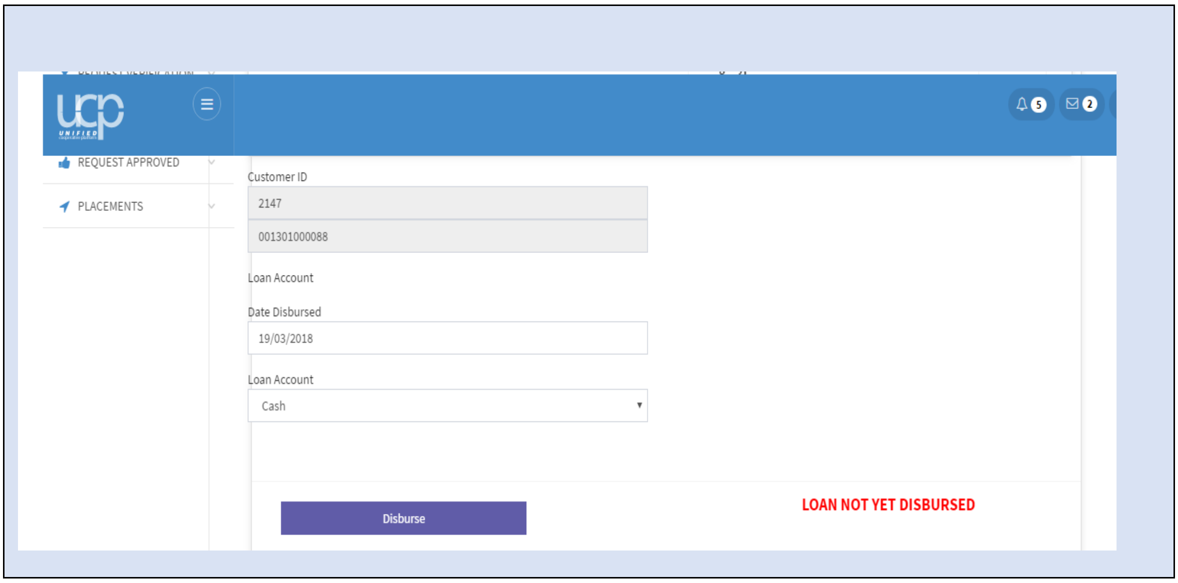
3. Click the **Submit** button:



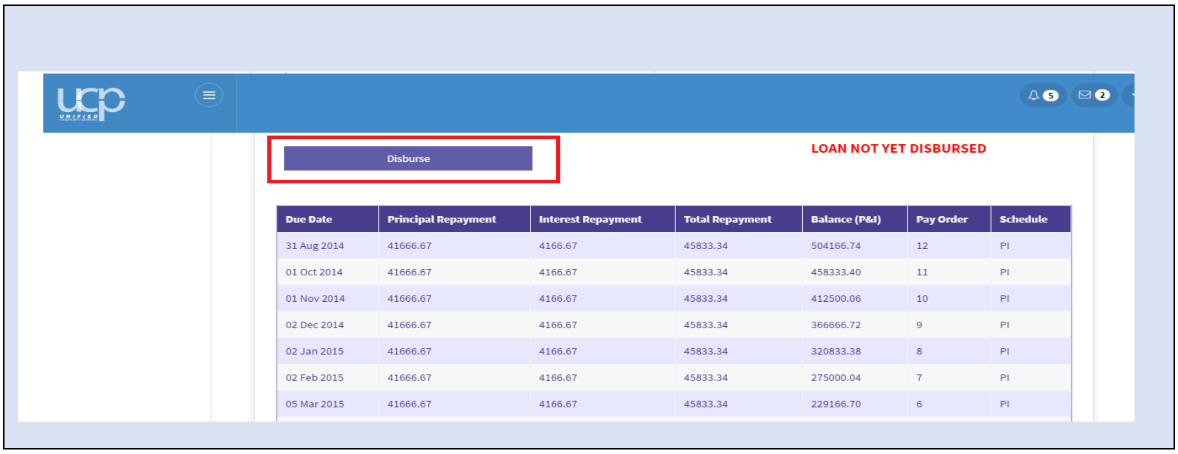
4. Click the **View Schedule** button:



5. Provide the required details:



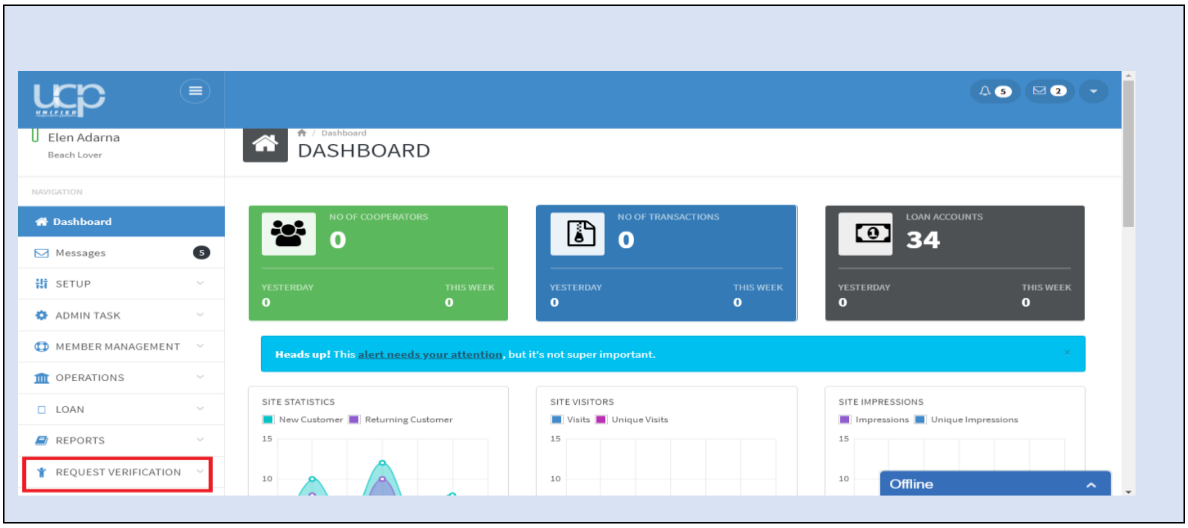
6. The Repayment Schedule is displayed. Click the **Disburse** button to disburse the Loan:



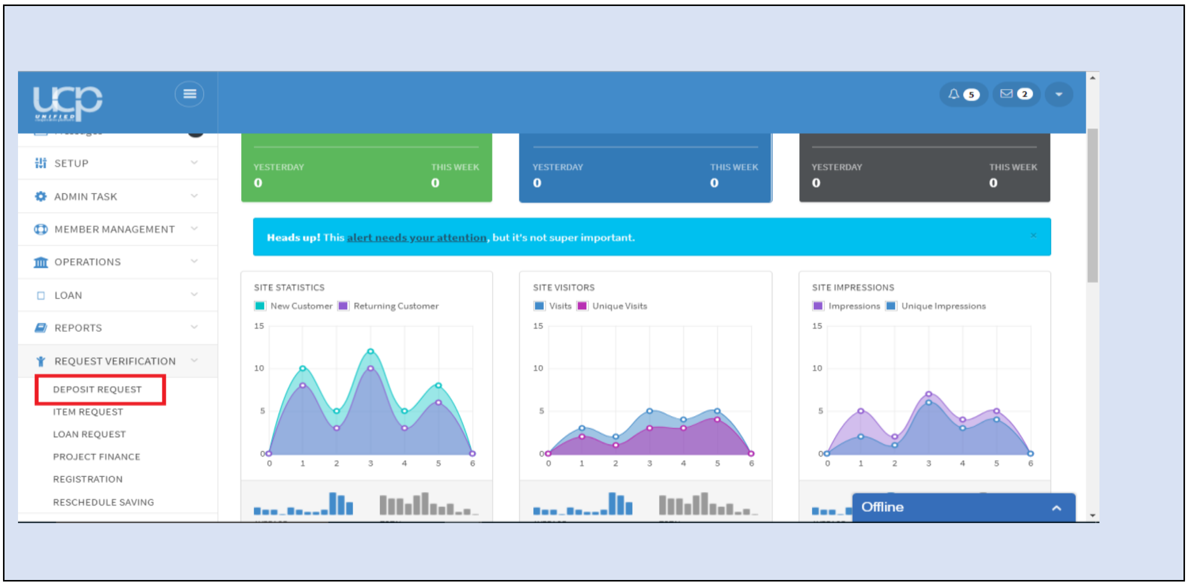
10.3. Registration Request

10.3.1. Approve/Reject Registration Request

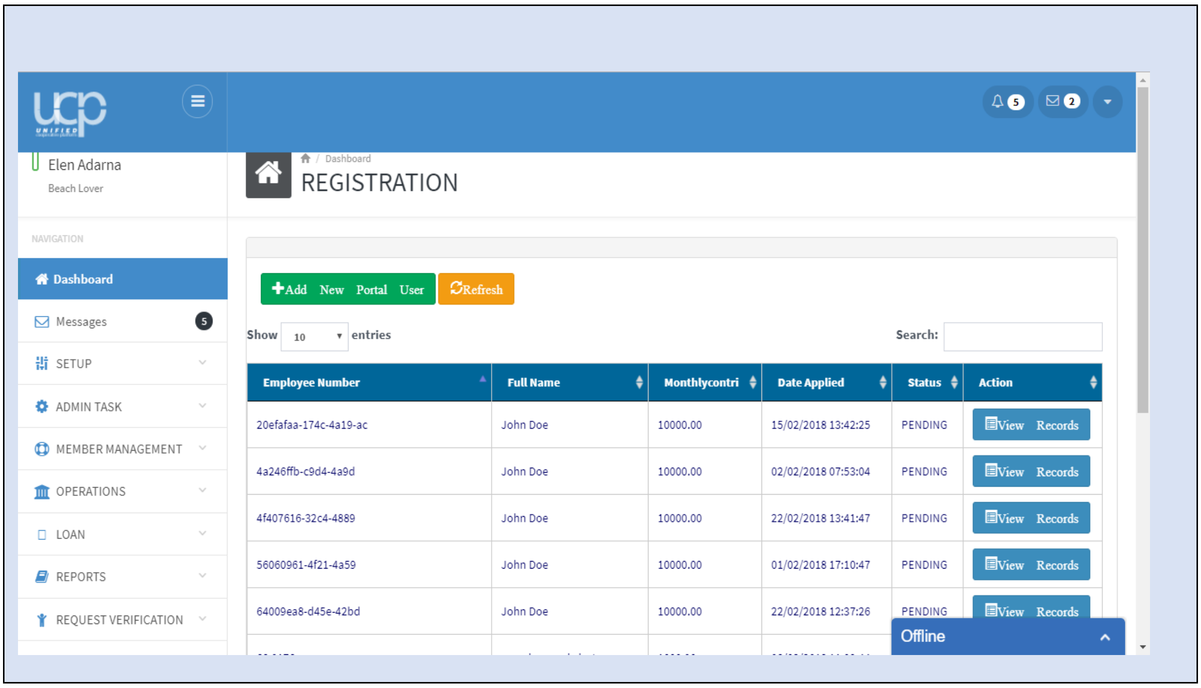
1. Login and click on the **Request Verification** Menu:



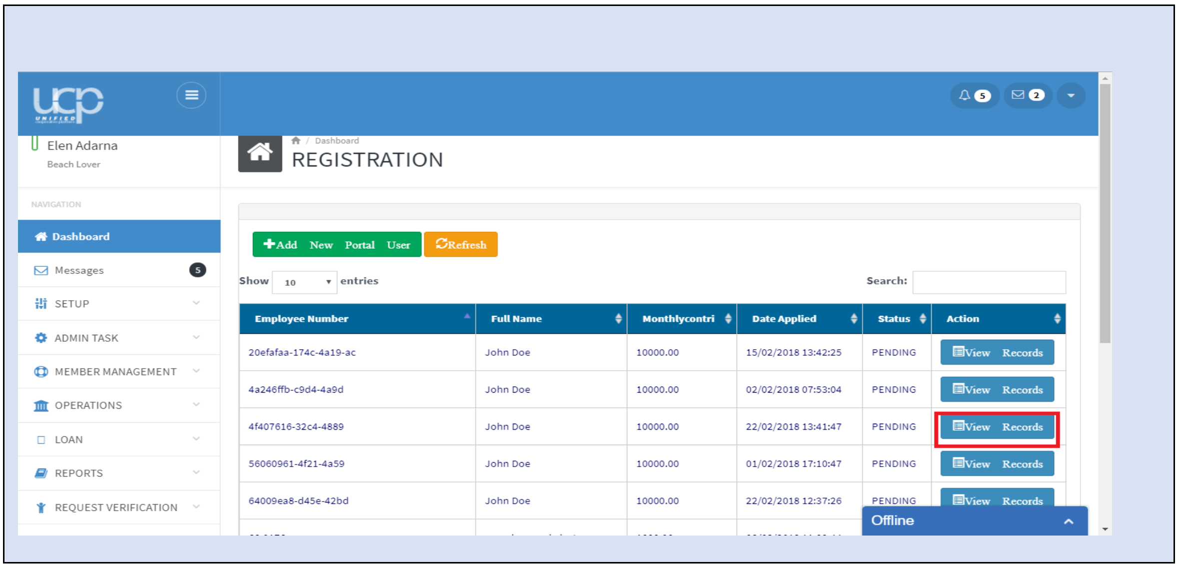
2. Click on the **Registration** Sub menu:



3. The Registration Request page is displayed listing the Registration Requests:



4. Click on the **View Records** button for a particular Registration request:



5. The Registration request details are displayed. Click the **Approve/Reject** button to Approve/Reject request: