

Alberta Personal Property Registry Electronic System (APPRES)

Maintain Preferences APPRES Finance and Reporting User Guide

Please note: The material in this package was prepared by PPR business support staff and is intended to assist users with maintain preferences, APPRES finance and reporting functionality in APPRES.

Preferences, Finance and Reporting User Guide

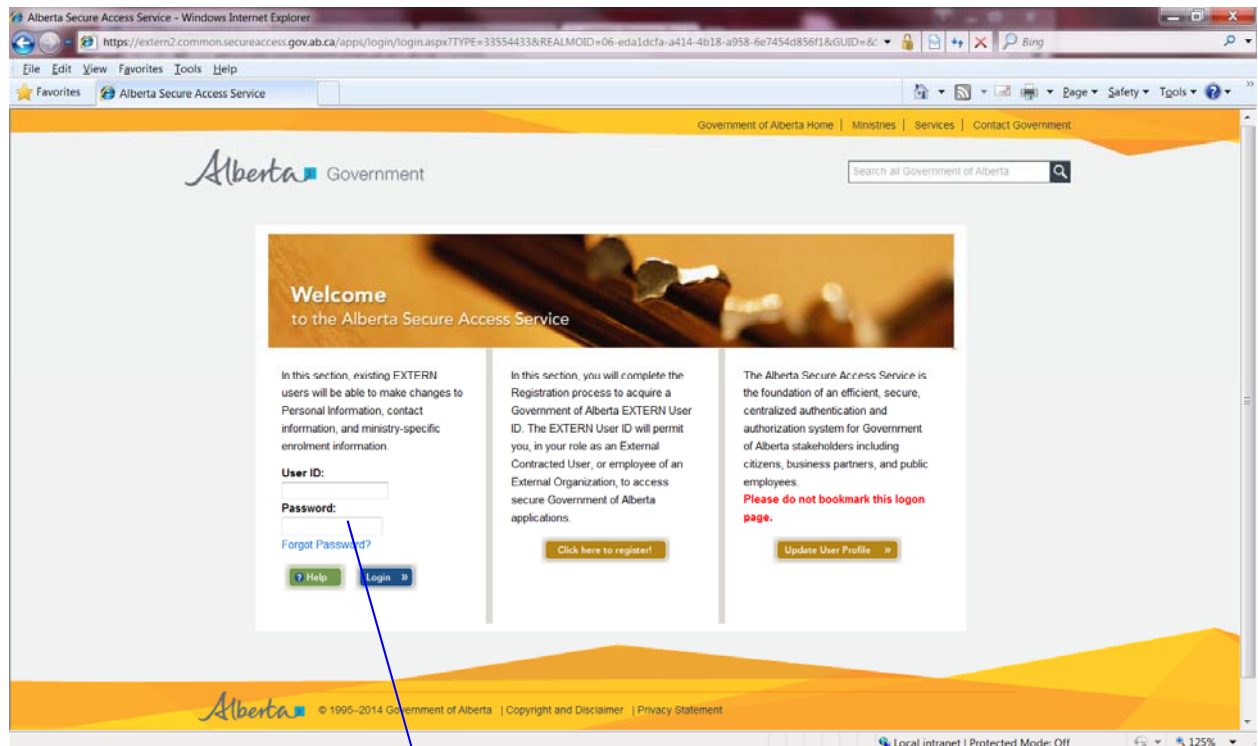
Getting Started

You will require an Alberta Secure Access Service (ASAS) User ID to access APPRES. Refer to the ASAS information package for instructions on obtaining an ASAS User ID.

Once you have an ASAS User ID navigate to APPRES at this location:

<https://appres.reg.gov.ab.ca>

Supply your ASAS User ID and password and click “Login”.



Alberta Secure Access Service - Windows Internet Explorer

https://extern2.common.secureaccess.gov.ab.ca/apps/login.aspx?TYPE=33554433&REALMOID=06-eda1dcfa-a414-4b18-a958-6e7454d856f1&GUID=8c...

File Edit View Favorites Tools Help

Government of Alberta Home | Ministries | Services | Contact Government

Alberta Government

Welcome to the Alberta Secure Access Service

In this section, existing EXTERN users will be able to make changes to Personal Information, contact information, and ministry-specific enrolment information.

User ID:

Password:

Forgot Password?

Help Login

In this section, you will complete the Registration process to acquire a Government of Alberta EXTERN User ID. The EXTERN User ID will permit you, in your role as an External Contracted User, or employee of an External Organization, to access secure Government of Alberta applications.

Click here to register!

The Alberta Secure Access Service is the foundation of an efficient, secure, centralized authentication and authorization system for Government of Alberta stakeholders including citizens, business partners, and public employees.

Please do not bookmark this login page.

Update User Profile

Alberta © 1995-2014 Government of Alberta | Copyright and Disclaimer | Privacy Statement

Local intranet | Protected Mode: Off

Supply your ASAS User ID and password to access APPRES.

Preferences, Finance and Reporting User Guide

APPRES Home Page

The APPRES home page will appear, the information on the page will be updated to reflect current events or system outages.

To continue maneuver your cursor over the “Menu” text, a drop down menu will appear, select “Maintain Preferences” from the list.

APPRES | Personal Property Registry | Alberta

Menu | H.Wood123 | APPRES ID: M68I3VDD | Example Registration Business Ltd | LOGOUT | Help

Home
Registry Activities
Security Activities
Maintain Preferences
Request Affiliation

Welcome to APPRES Build # 2859.1

The following General Comments:

- To modify your Personal Information and or Password please click on '[ASAS](#)'.
- Popups are used to support the APPRES application. Please ensure that popups are enabled.
- DO NOT** send distributions to locations outside of AGS.
- Note that Scheduling has been enabled. Please use caution when adding Client Account Product Distribution Records as arrears notifications and or Client Account Statements may be distributed to a client if fax is identified or if a non test e-mail is entered into the Party General details and e-mail is identified.

No messages found.

Internet

Select Maintain Preferences to continue.

Preferences, Finance and Reporting User Guide

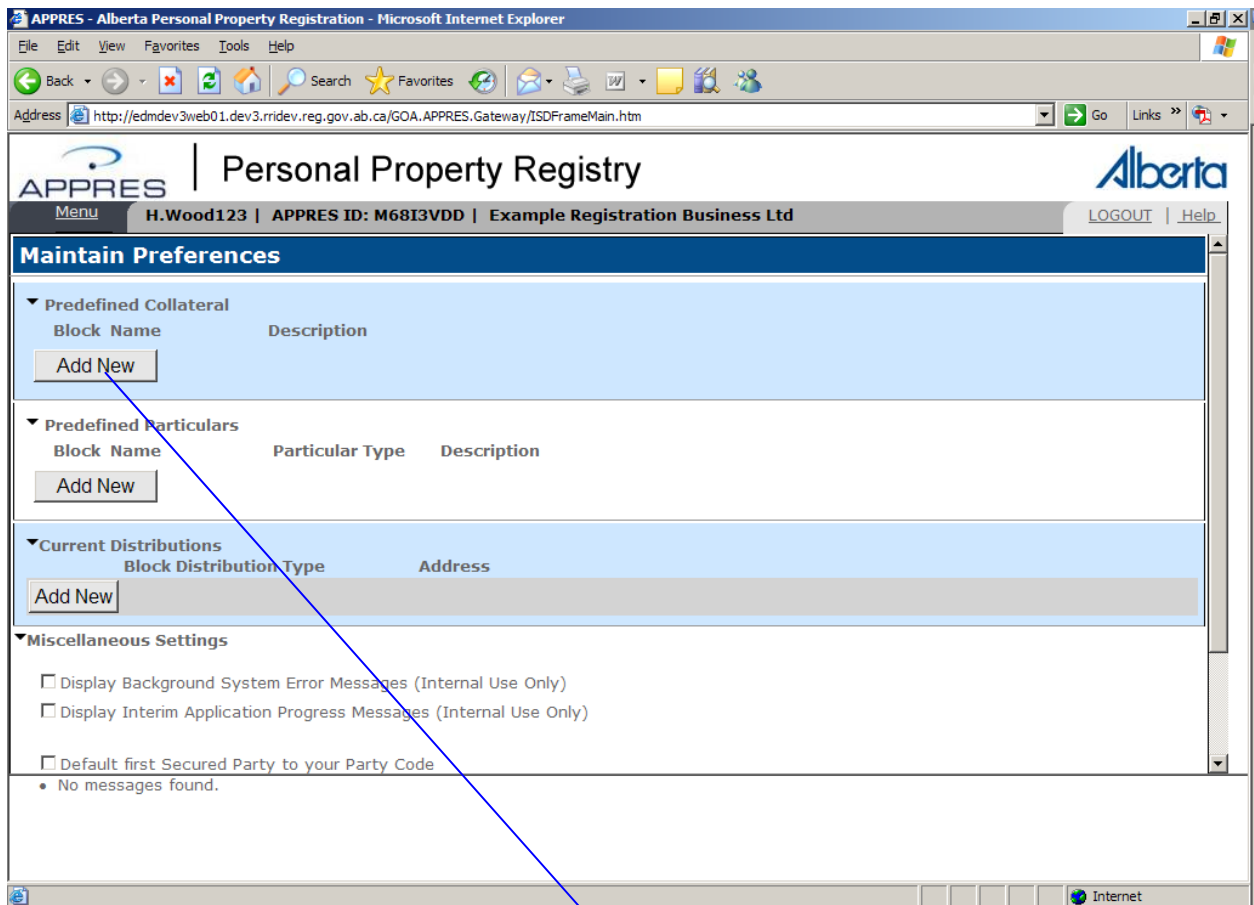
Maintain Preferences

Maintain Preferences allows you to save a frequently used description for general collateral or particulars, you will then be able to supply the saved description during the registration process.

Refer to the *Maintain Preferences* section in the Help Guide for additional information on this screen.

To create a predefined description, click on “Add New” under predefined collateral or predefined particulars for the type of description you wish to save.

For this example a predefined collateral description will be created and saved.



Click on add new to create a new description.

Preferences, Finance and Reporting User Guide

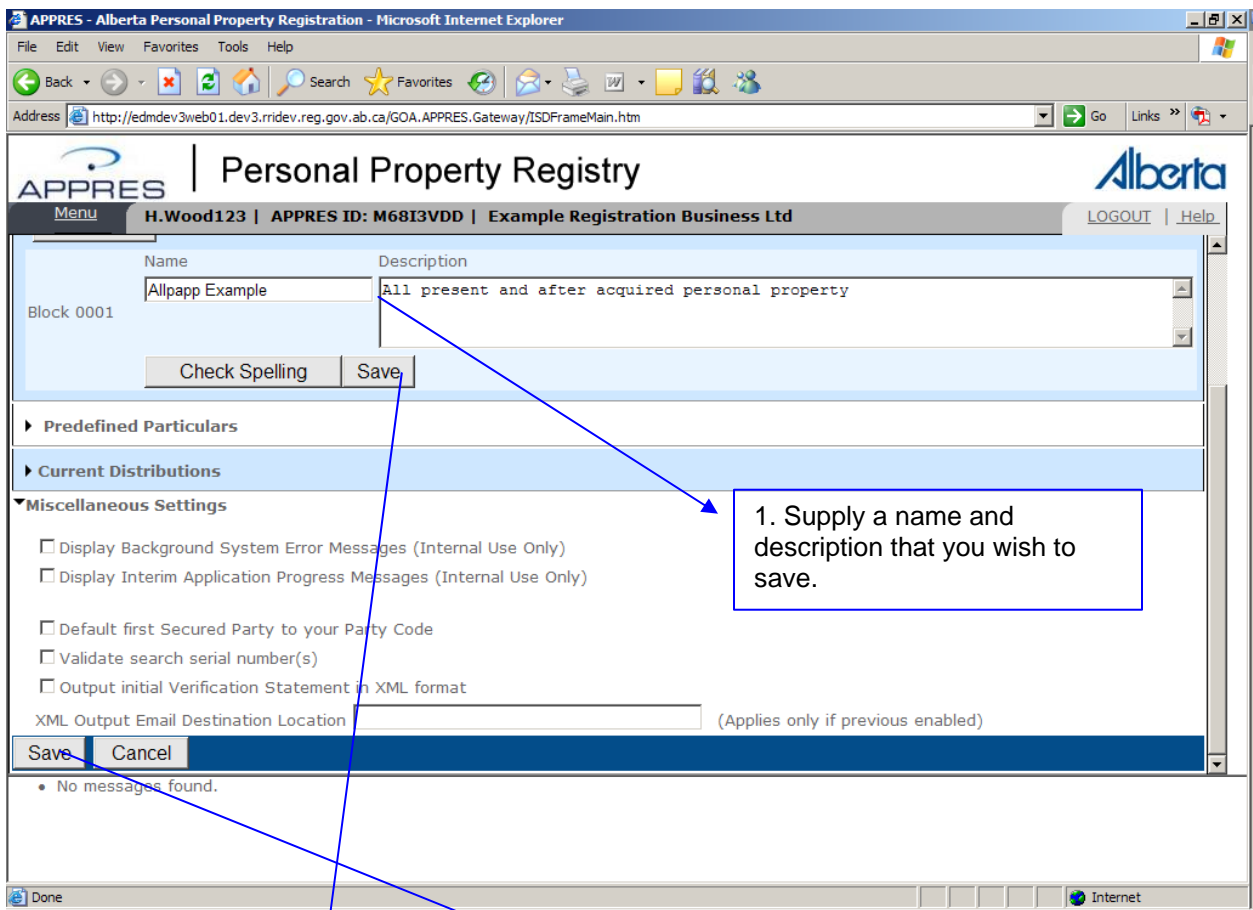
Predefined Description

Supply a name and the description that you wish to save. Up to 15 predefined collateral and 15 predefined particulars descriptions can be saved.

To successfully save the description the following details are required:

- Collateral – name of description and the general collateral text up to a maximum of 2000 characters.
- Particulars – name of description, particulars type and the particulars description up to a maximum of 500 characters.

In this example, the details shown below were supplied. Click “Save” to save the description then click “Save” at the bottom of the screen to complete the overall save of the description. You must log off and on again for the change to take affect.



1. Supply a name and description that you wish to save.

2. Click “Save” to save description.

3. You must click this “Save” to begin the overall save process.
Click “Continue” when prompted to complete save process.

Preferences, Finance and Reporting User Guide

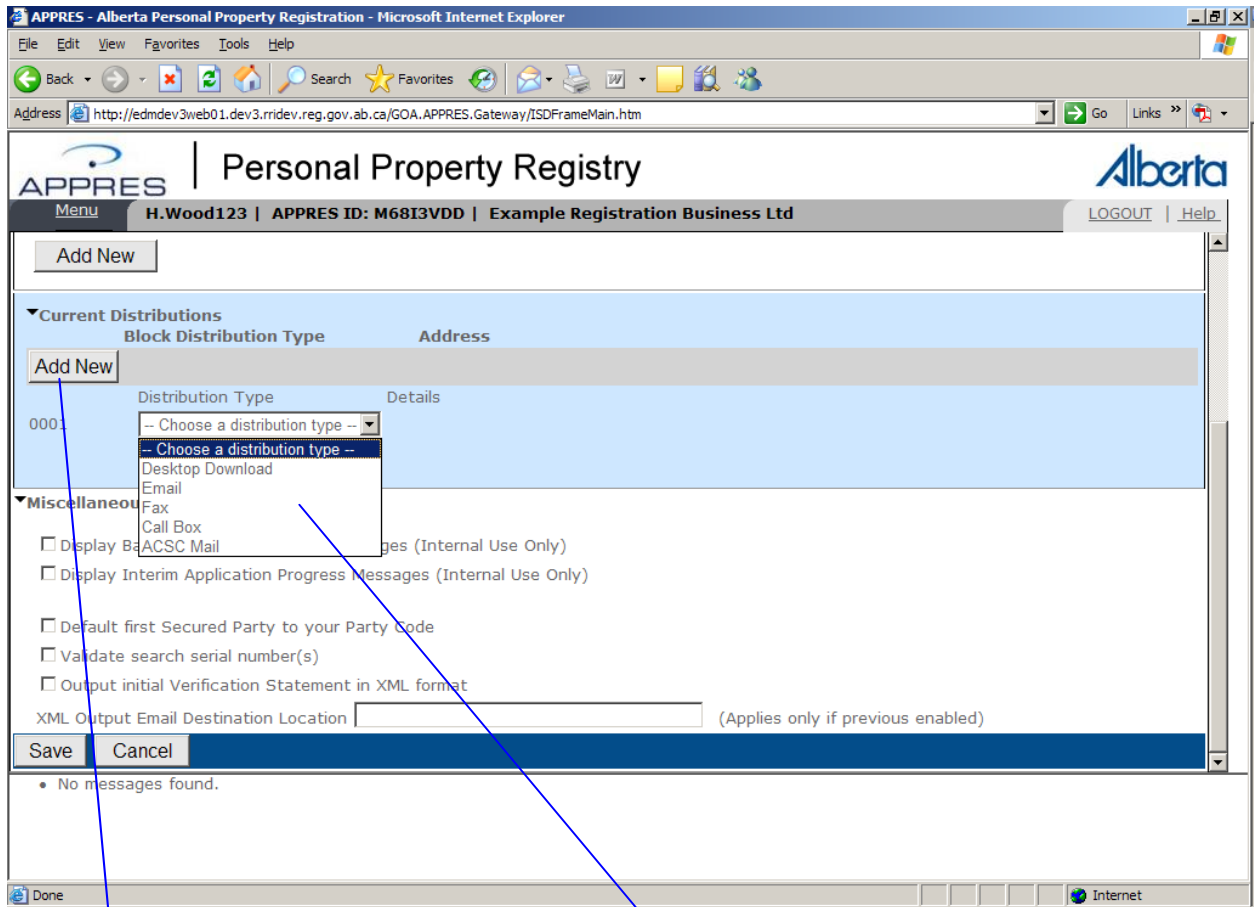
Setting a default Distribution Method

To select a distribution method that will default whenever you distribute a product, click on “Add New” under the Current Distributions section.

These additional details are required if these distribution methods are selected:

- Email – a valid email address
- Call Box – a call box in Edmonton or Calgary - must be prefixed with “E” or “C”.

Please refer to the *Methods of Distributing Material* section of the Help Guide for additional information.



1. Click “Add New”.

2. Select a method from the list.

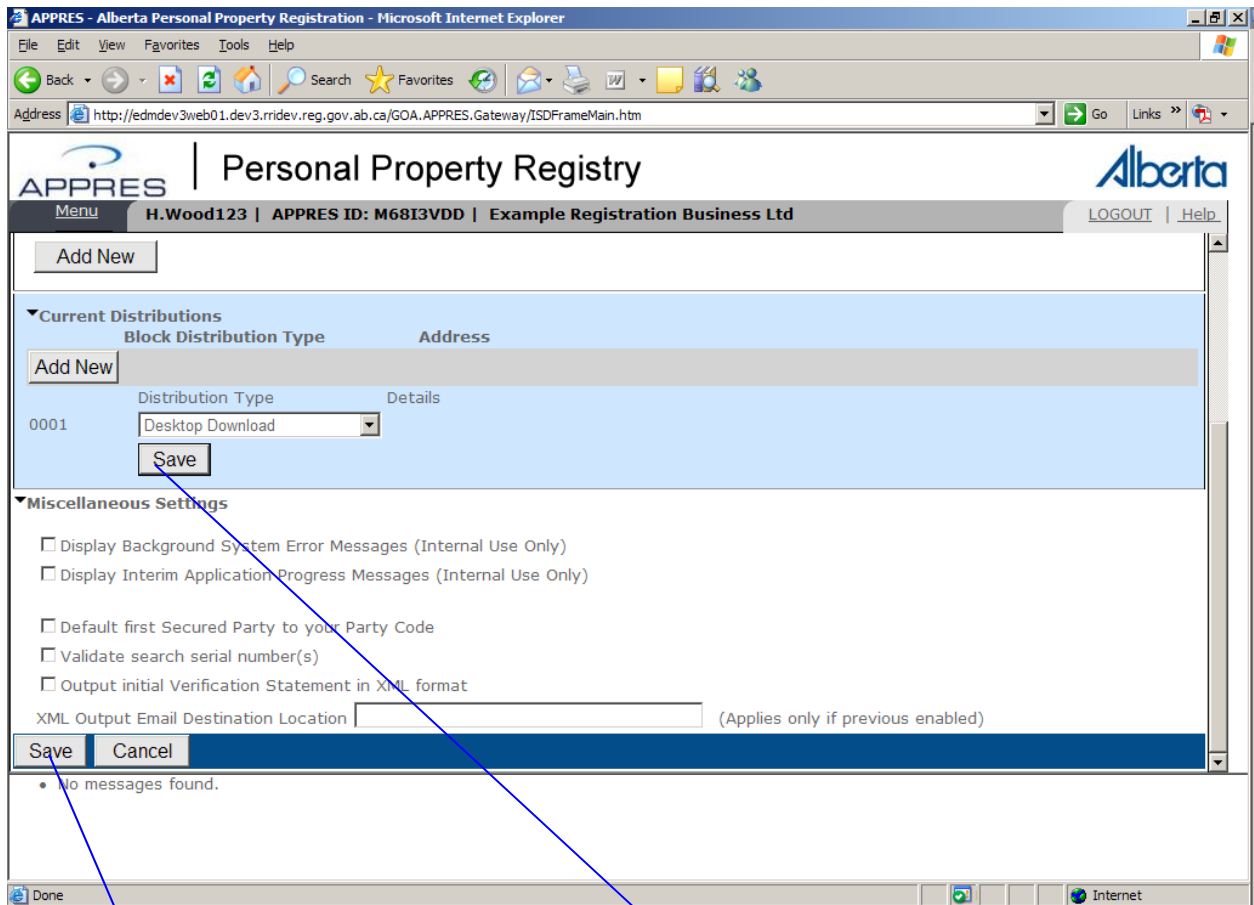
Preferences, Finance and Reporting User Guide

Setting a default Distribution Method - continued

Click “Save” to under the “Current Distribution” section, then you must click “Save” at the bottom of the screen to complete the overall save.

You can select “Add New” to select additional methods of receiving the material if required.

You must logout and sign on again for the changes to take affect.



2. Click “Save” then “Continue” to complete save process.

1. Click “Save” to save method.

Preferences, Finance and Reporting User Guide

Miscellaneous Settings

Display Background System Error Messages (Internal Use Only)

Display Interim Application Progress Messages (Internal Use Only)

These two settings only apply to internal users, whether you check in the box or leave blank will not have an impact on the messages viewed in the results window.

Default first Secured Party Code to your Party Code

If you would like the first secured party on a financing statement to default to your organization's name and address - check this box.

Validate search serial number(s)

If you would like the serial number provided on a serial number search to be validated prior to the search being processed – check this box

Output initial Verification Statement in XML format (and email location)

If you are using the upload functionality to create draft financing statement / financing change statement and wish to receive the Verification Statement in XML format, check this box, supply the email address you wish the output to be sent to on the next line.

The screenshot shows the APPRES web application interface in a Microsoft Internet Explorer browser window. The browser address bar shows the URL: <http://edmdev3web01.dev3.rridev.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page title is "APPRES - Alberta Personal Property Registry". The user is logged in as "H.Wood123" with APPRES ID: M68I3VDD and Example Registration Business Ltd. The interface includes a "Menu" button, "LOGOUT" and "Help" links, and an "Add New" button. The "Miscellaneous Settings" section contains the following options:

- Display Background System Error Messages (Internal Use Only)
- Display Interim Application Progress Messages (Internal Use Only)
- Default first Secured Party to your Party Code
- Validate search serial number(s)
- Output initial Verification Statement in XML format

Below these options is a text input field for "XML Output Email Destination Location" with a placeholder "(Applies only if previous enabled)". At the bottom of the page, a message states "No messages found."

Preferences, Finance and Reporting User Guide

Registry Activities – Finance Options

To view and redistribute the Client Account Statement for your organization, click “Go” beside “Browse Client Account” under the “Finance Options”.

Please note: you will only be able to see this option if it has been enabled by your Site Coordinator. If you are the Site Coordinator and do not see this option, refer to the Site Coordinator Information Package for instructions on obtaining this option.

The screenshot shows the APPRES Personal Property Registry interface. The page title is "APPRES | Personal Property Registry" with the Alberta logo. The user is logged in as "H. Wood123 | APPRES ID: M68I3VDD | Example Registration Business Ltd". The interface is divided into several sections:

- Search Options:** Includes "Perform a Search" (dropdown) and "Browse for Performed Searches".
- Finance Options:** Includes "Browse Client Account" (with a "Go" button) and "Browse Client Account Transactions" (with a "Go" button).
- Reporting Options:** Includes "Request a Report" (dropdown) and "Browse Completed Reports" (with a "Go" button).

At the bottom of the page, there is a message: "• No messages found." A blue arrow points from a text box at the bottom of the page to the "Go" button next to "Browse Client Account" in the Finance Options section.

Click “Go” to view client account information and redistribute a Client Account Statement.

Preferences, Finance and Reporting User Guide

Browse Client Account Information

The organization name, address, phone, fax number and contact name will appear. In addition the current balance, previous month, 30, 60 and 90 day balances are also displayed.

You are also able to redistribute a client account statement that had been generated in the past 3 months. In this example there are none available to redistribute, if there was, you would see the statement date, accumulated interest (if any) and the amount due on that statement. To redistribute, you would see a radio button beside each statement, click in the radio button beside the statement you wish to redistribute and supply a distribution method (if you have not chosen a default method or if you wish to distribute through a different method).

The screenshot shows a web browser window titled "APPRES - Alberta Personal Property Registration - Microsoft Internet Explorer". The address bar shows the URL: <http://edmdev3web01.dev3.rridev.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page content includes the APPRES logo and the text "Personal Property Registry" with the Alberta logo. The user is logged in as "H.Wood123" with APPRES ID: M68I3VDD, viewing the account for "Example Registration Business Ltd".

Contact: Contact Name
111 22 Street
Edmonton, AB - Alberta, T6Y 7U8
Phone: Fax:

Current Month Balance: \$ 0.00
Previous Month Balance: \$ 0.00
One Month Overdue: \$ 0.00 Age: 0
Two Months Overdue: \$ 0.00
Three Months Overdue: \$ 0.00
Interest Balance: \$ 0.00
Current Balance: \$ 0.00

▼ Client Account Statement Summaries

Statement Date (yyyy/mm/dd)	Accumulated Interest	Total Amount Due
• No messages found.		

Preferences, Finance and Reporting User Guide

Browse Client Account Transactions

To view transactions that have been charged to your client account, click “Go” beside “Browse Client Account Transactions” under the “Finance Options” on the Registry Activities screen.

You will be able to view transactions performed by all users of your organization by removing the default User ID and clicking search. You can also filter by a specific party code associated to your account number or for a specific date range.

The transaction detail includes the date, time, account number, account name, party code, control number and registration number or search ID, type of registration or search performed, reference number (if supplied), the amount charged and the user ID of the individual who performed the transaction.

The screenshot shows the APPRES web application interface. The browser title is "APPRES - Alberta Personal Property Registration - Microsoft Internet Explorer". The address bar shows the URL: <http://edmddev3web01.dev3.rridev.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page header includes the APPRES logo, "Personal Property Registry", and the Alberta logo. The user is logged in as "H.Wood123" with APPRES ID "M68I3VDD" for "Example Registration Business Ltd".

The main section is titled "Browse Client Account Transactions". It contains search filters for PPR Reference, Account Number (60000120), Party Code (60000120), and User ID (M68I3VDD). Date filters are set from 2007/11/01 00:00:00 to 2007/11/30 23:59:59. A "Search" button is present.

Below the search filters, it indicates "1 - 2 of total 2 matches". A table displays the search results:

Date (yyyy/mm/dd hh:mm:ss)	Account #	Account Name	Party Code	PPR Reference	PPR Reference Type	Client Reference	Amount	User ID
2007/11/27 16:18:36	60000120	Example Registration Business Ltd	60000120	F00000358;07112700015;	Security Agreement	File # 1234	\$10.00	M68I3VDD
2007/11/27 16:19:32	60000120	Example Registration Business Ltd	60000120	Z00000129	Business Debtor Search; EXAMPLE BUSINESS DEBTOR SEARCH INC	File #1234	\$1.00	M68I3VDD

A "Return" button is located below the table. At the bottom of the page, a log of activities is displayed:

- Product for [Z00000129](#) is available for viewing. [2007/11/27 16:19:45]
- Successfully submitted distribution request for Z00000129. [2007/11/27 16:19:44]
- Search: Z00000129 finalized. [2007/11/27 16:19:44]
- Successfully executed Search: [Z00000129](#) [2007/11/27 16:19:33]
- Finance charge of \$1.00 for Z00000129 has been completed. [2007/11/27 16:19:33]
- Product for [07112700015](#) is available for viewing. [2007/11/27 16:18:42]

Preferences, Finance and Reporting User Guide

Registry Activities – Reporting Options

Depending on the type of organization you are affiliated with, you will have the ability to generate the following reports:

- Expiring Registration Report
- Report of Seizure Registration Report
- Report of Seizure Sheriff's Report

For the purpose of this example, the Expiring Registration Report has been selected.

The screenshot shows the APPRES web application interface. The browser title is "APPRES - Alberta Personal Property Registration - Microsoft Internet Explorer". The address bar shows the URL: <http://edmdev3web01.dev3.rridev.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page header includes the APPRES logo, the text "Personal Property Registry", and the Alberta logo. Below the header, the user is logged in as "H.Wood123 | APPRES ID: M68I3VDD | Example Registration Business Ltd". The main content area is divided into several sections: "Draft a Financing Change Statement" with a dropdown menu and a "Go" button; "Browse Draft Financing Statement / Financing Change Statement"; "Re Register an Expired or Discharged Registration"; "Upload Electronic Financing Statement(s) or Financing Change Statement(s)" with a "Browse..." button and a "Go" button; "View Registration History"; "Search Options" with a dropdown menu and a "Go" button; "Browse for Performed Searches" with a "Search ID Number (if known)" input field and a "Go" button; "Finance Options" with "Browse Client Account" and "Browse Client Account Transactions" links, each with a "Go" button; and "Reporting Options" with "Request a Report" set to "APOP0010 - Expiring Registration Report" and a "Go" button, and "Browse Completed Reports" with a "Go" button. A blue arrow points from a text box to the "Go" button next to the "Request a Report" dropdown.

Click "Go" to request selected report.

Preferences, Finance and Reporting User Guide

Registry Activities – Reporting Options - continued

For this report type, you can choose an expiry date range up to 45 days from today's date. If you have not provided a default distribution method, supply those details first then click "Generate Report" to obtain the report.

Please refer to the *Expiring Registration Report* section of the Help Guide for detailed information on this report.

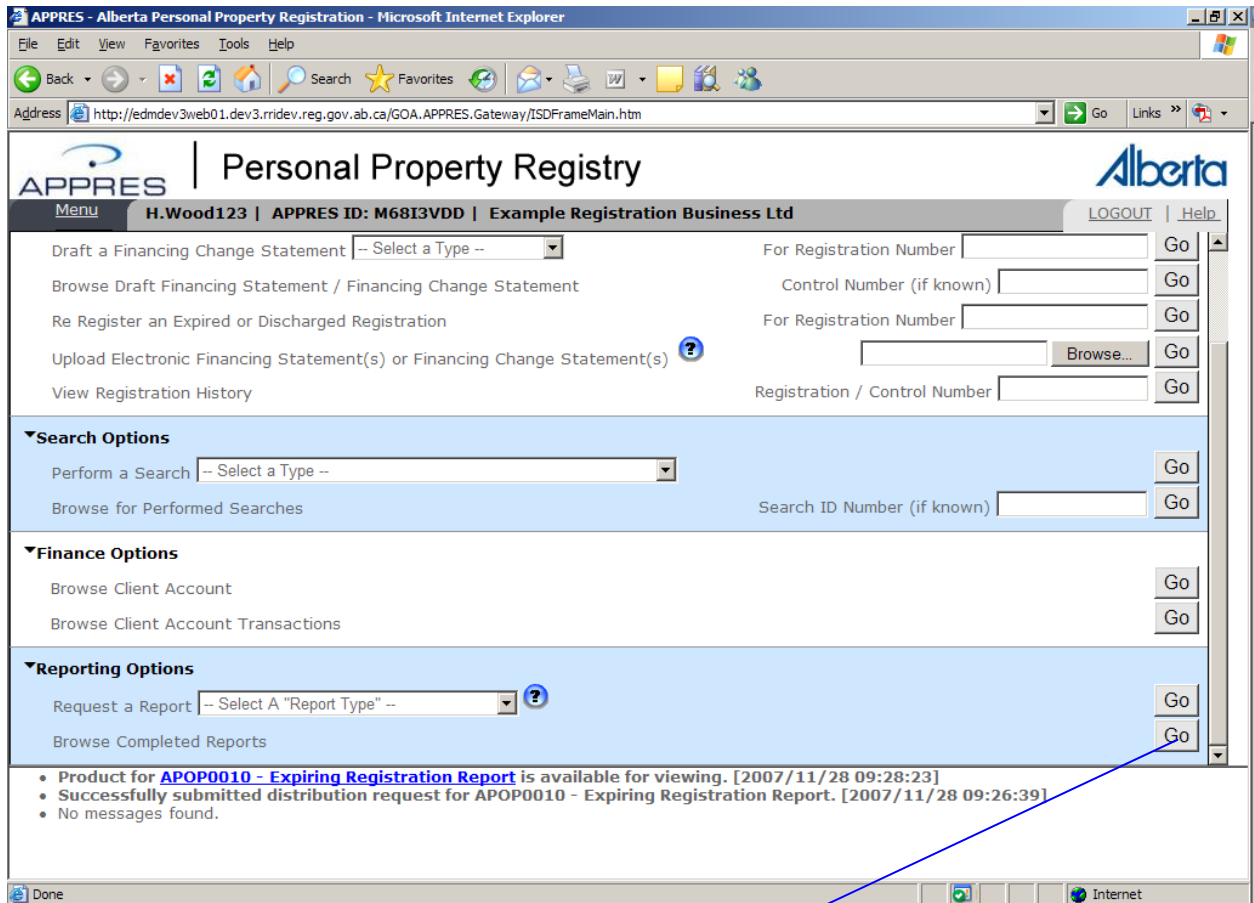
1. Supply a distribution method.

2. Click "Generate Report" to receive report details.

Preferences, Finance and Reporting User Guide

Reporting Options – Browse for Completed Reports

You can distribute a previously requested report by accessing the “Browse Completed Reports” under the Reporting Options section.



Click “Go” to view and distribute previously requested reports.

Preferences, Finance and Reporting User Guide

Browse for Completed Reports

A list of reports that have been previously requested within the report execution date range will appear. The report execution date will default to the current month and can be modified to include reports requested up to 4 months in the past.

You can also choose to filter the list of reports to a specific user within your organization by supplying the APPRES User ID of that person in the User ID field and clicking search.

To distribute a report, click on “Distribute” beside the report you wish to receive and supply a distribution method (only if you have not provided a default method or wish to receive in a method other than the default method).

APPRES - Alberta Personal Property Registration - Microsoft Internet Explorer

Address: <http://edmdev3web01.dev3.rridev.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>

Personal Property Registry | Alberta

H.Wood123 | APPRES ID: M68I3VDD | Example Registration Business Ltd | LOGOUT | Help

Browse Completed Reports

Return Search

Party Code: 60000120 | User ID: M68I3VDD | Report Type: -- Select a "Report Type" --

Report Execution Date (yyyy/mm/dd hh:mm:ss): 2007/11/01 00:00:00 - 2007/11/30 23:59:59 | Report Request Identification Number: []

1 - 1 of total 1 matches

Report Request Identification Number	Party Code	User ID	Report Type	Report Execution Date (yyyy/mm/dd hh:mm:ss)	
12802	60000120	M68I3VDD	APOP0010 - Expiring Registration Report	2007/11/28 09:26:39	Distribute

- Product for [APOP0010 - Expiring Registration Report](#) is available for viewing. [2007/11/28 09:28:23]
- Successfully submitted distribution request for APOP0010 - Expiring Registration Report. [2007/11/28 09:26:39]
- No messages found.