



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.ca Account to access APPRES. Please refer to the APPRES Affiliation Guide for instructions on creating an Alberta.ca Account and password.

Once you have an Alberta.ca Account/password navigate to APPRES at this location:

<https://appres.alberta.ca>

Click Login to APPRES and supply your Alberta.ca Account and password and click Next.

The screenshot shows the top of the APPRES website. At the top left is the APPRES logo and the text 'Personal Property Registry'. Below this is a dark blue banner with the text 'Welcome to the Alberta Personal Property Registry Electronic System (APPRES)'. Underneath the banner, there is a link for instructions on creating an Alberta.ca Account. The main content area contains a button labeled 'Login to APPRES', followed by the text 'Click here to login with your Alberta.ca Account OR Create an Alberta.ca Account'. At the bottom, there is a dark blue footer with contact information under the heading 'Need help?'. A blue arrow points from the 'Login to APPRES' button to a callout box that says 'Click this button then supply your User ID and password'.

APPRES | Personal Property Registry

Welcome to the Alberta Personal Property Registry Electronic System (APPRES)

For instructions on creating your Alberta.ca Account and logging on with it please open this [PDF](#)

Login to APPRES Click here to login with your Alberta.ca Account
OR
Create an Alberta.ca Account

Need help?
Alberta.ca Account - alberta-ca.account@gov.ab.ca or 1-844-643-2789 (M-F 8:15 - 4:30)
APPRES - PersonalProperty.Reg@gov.ab.ca or 1-866-301-6206 (M-F 8:15 - 4:30)

Click this button then supply your User ID and password

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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.

The screenshot shows the APPRES Personal Property Registry home page. The browser address bar displays the URL: <https://appres.alberta.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page header includes the APPRES logo, the text "Personal Property Registry", and the Government of Alberta logo. A navigation bar contains a "Menu" link, the user ID "APPRES ID: HeathWoo752", and the text "ALBERTA REGISTRIES- PERSONAL PROPERTY...". The main content area features a "Welcome to APPRES" message, a note about browser support (Microsoft Internet Explorer), extended outage dates, telephone service hours, accreditation information, client account statements, a manual, subscription service, and digital identity links. A "Personal Property Registry (PPR) Contacts" section at the bottom lists recent system events. A blue arrow originates from the "Menu" link in the navigation bar and points to a blue-bordered box containing the text "Select Maintain Preferences to continue."

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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.

The screenshot shows the 'Maintain Preferences' interface. The 'Predefined Collateral' section is highlighted with a blue background and contains an 'Add New' button. A blue arrow originates from this button and points to a text box that says 'Click on Add New to create a new description.'

Click on Add New to create a new description.

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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.

The screenshot shows the 'Maintain Preferences' page in the APPRES system. The 'Predefined Collateral' section contains a table with the following data:

| Block Name | Description |
|------------|--|
| 0001 | All present and after acquired personal property |

Below the table, the 'Name' field is populated with 'Allpapp Example' and the 'Description' field is populated with 'All present and after acquired personal property'. The 'Save' button is highlighted with a blue box and an arrow pointing to a text box.

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.

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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 Address – must be in example@example.com format

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

The screenshot shows the 'Maintain Preferences' page in the APPRES system. The 'Current Distributions' section is expanded, showing a table with columns for 'Block Distribution Type' and 'Address'. An 'Add New' button is highlighted with a blue arrow. A dropdown menu is open, showing options: '- Choose a distribution type - v', 'Desktop Download', 'Email', and 'ACSC Mail'. Another blue arrow points from the 'Email' option to a box labeled '2. Select a method from the list.'

1. Click “Add New”.

2. Select a method from the list.

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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 in again for the changes to take affect.

The screenshot shows the 'Maintain Preferences' page in the APPRES system. The page is divided into several sections:

- Predefined Collateral:** A table with columns 'Block Name' and 'Description'. An 'Add New' button is present.
- Predefined Particulars:** A table with columns 'Block Name', 'Particular Type', and 'Description'. An 'Add New' button is present.
- Current Distributions:** A table with columns 'Block Distribution Type' and 'Address'. A row is visible with '0001' in the first column and 'Desktop Download' in the second. A 'Save' button is located below this row.
- Miscellaneous Settings:** A section with several checkboxes and a text input field for 'XML Output Email Destination Location'.

Two blue boxes with arrows provide instructions:

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

• No messages found.

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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.

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.

APPRES - Alberta Personal Propri x +
https://staging.appres.alberta.ca/GOA.APPRES.Gateway/ISDFrameMain.htm

Personal Property Registry | Government of Alberta
APPRES ID: HeathWoo385 | Example Search Business Ltd | LOGOUT | Help

Maintain Preferences

▼ Predefined Collateral

| Block Name | Description |
|--|-------------|
| <input type="button" value="Add New"/> | |

▼ Predefined Particulars

| Block Name | Particular Type | Description |
|--|-----------------|-------------|
| <input type="button" value="Add New"/> | | |

► Current Distributions

▼ Miscellaneous Settings

Display Background System Error Messages (Internal Use Only)

Display Interim Application Progress Messages (Internal Use Only)

Default first Secured Party to your Party Code

Output Initial Verification Statement in XML format

XML Output Email Destination Location: (Applies only if previous enabled)

• No messages found.

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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 'Registry Activities' section is expanded, and the 'Finance Options' sub-section is highlighted in light blue. Under 'Finance Options', the 'Browse Client Account' option is visible with a 'Go' button next to it. A blue arrow points from this 'Go' button to a callout box. Other options include 'Draft a Financing Statement', 'Draft a Financing Change Statement', 'Browse Draft Financing Statement / Financing Change Statement', 'Re Register an Expired or Discharged Registration', 'Upload Electronic Financing Statement(s) or Financing Change Statement(s)', 'View Registration History', 'Perform a Search', 'Browse for Performed Searches', 'Request a Report', and 'Browse Completed Reports'. Each option has a 'Go' button or a dropdown menu.

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

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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 displays the 'Client Account Information' page in the APPRES system. The page header includes the APPRES logo, 'Personal Property Registry', and the Government of Alberta logo. The user is logged in as 'HeatheWoo385' for 'Example Search Business Ltd'. The main content area shows the following details:

- Client Account Number: 60008267
- Account Number: 60008267, Status: Active
- Example Search Business Ltd
- Contact: Example Business, 12122 110 Ave, Edmonton, AB - Alberta, T6Y7U8
- Phone: Ext., Fax: Ext., Email - Secured Party
- Current Month Balance: \$ 9.00
- 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: **\$ 9.00**

Below the account information is a section for 'Client Account Statement Summaries' with a table structure:

| Statement Date (yyyy/mm/dd) | Accumulated Interest | Total Amount Due |
|-----------------------------|----------------------|------------------|
|-----------------------------|----------------------|------------------|

• No messages found.

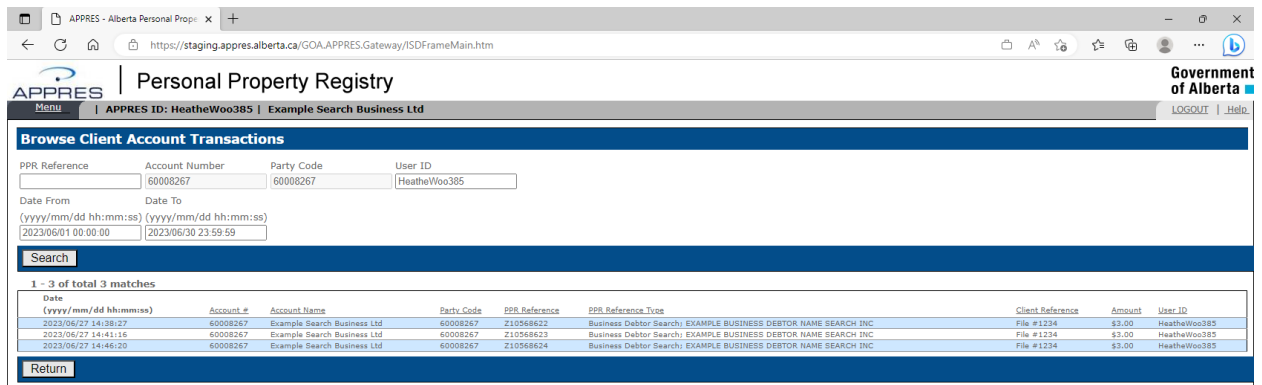
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Browse Client Account Transactions

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 'Personal Property Registry' interface. The page title is 'Browse Client Account Transactions'. The search filters are as follows:

| PPR Reference | Account Number | Party Code | User ID |
|---------------|----------------|------------|--------------|
| | 60008267 | 60008267 | HeatheWoo385 |

Date From: 2023/06/01 00:00:00
Date To: 2023/06/30 23:59:59

Search

1 - 3 of total 3 matches

| Date (yyyy/mm/dd hh:mm:ss) | Account # | Account Name | Party Code | PPR Reference | PPR Reference Title | Client Reference | Amount | User ID |
|----------------------------|-----------|-----------------------------|------------|---------------|---|------------------|--------|--------------|
| 2023/06/27 14:38:27 | 60008267 | Example Search Business Ltd | 60008267 | Z10568622 | Business Debtor Search: EXAMPLE BUSINESS DEBTOR NAME SEARCH INC | File #1234 | \$3.00 | HeatheWoo385 |
| 2023/06/27 14:41:16 | 60008267 | Example Search Business Ltd | 60008267 | Z10568623 | Business Debtor Search: EXAMPLE BUSINESS DEBTOR NAME SEARCH INC | File #1234 | \$3.00 | HeatheWoo385 |
| 2023/06/27 14:46:25 | 60008267 | Example Search Business Ltd | 60008267 | Z10568624 | Business Debtor Search: EXAMPLE BUSINESS DEBTOR NAME SEARCH INC | File #1234 | \$3.00 | HeatheWoo385 |

Return

• No messages found.

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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 Personal Property Registry interface. The 'Reporting Options' section is highlighted in blue and contains the following items:

- Request a Report: A dropdown menu is set to 'APOP0010 - Expiring Registration Report'.
- Browse Completed Reports: A link to view completed reports.

Each item has a 'Go' button to its right. A blue arrow points from a text box below to the 'Go' button for the 'Request a Report' option.

Click "Go" to request selected report.

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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.

The screenshot shows the APPRES Personal Property Registry interface. At the top, there is a navigation bar with the APPRES logo and the text "Personal Property Registry" and "Government of Alberta". Below this, there is a "Report" section with a dropdown menu set to "APOP0010 - Expiring Registration Report" and a "New Report" button. Below the dropdown, there are "Return" and "Generate Report" buttons. The main form area contains a "Party Code" field with the value "60008267" and an "Expiry Range (Days From Today)" dropdown menu set to "45". Below this, there is a section titled "Current Distributions" with a table header containing "Block Distribution Type" and "Address". An "Add New" button is located at the bottom left of the table area.

• No messages found.

1. Supply a distribution method.

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

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Reporting Options – Browse for Completed Reports

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

The screenshot shows the APPRES Personal Property Registry interface. The 'Reporting Options' section is highlighted in blue and contains the following options:

- Request a Report [-- Select A "Report Type" --] [Go]
- Browse Completed Reports [Go]

- Product for [APOP0010 - Expiring Registration Report](#) is available for viewing. [2023/06/28 08:56:24]
- Successfully submitted distribution request for [APOP0010 - Expiring Registration Report](#). [2023/06/28 08:56:13]
- No messages found.

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

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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 | Personal Property Registry | Government of Alberta

Menu | APPRES ID: HeatheWoo385 | Example Search Business Ltd | LOGOUT | Help

Browse Completed Reports

Return Search

Party Code: 60008267 | User ID: HeatheWoo385 | Report Type: -- Select a "Report Type" --

Report Execution Date: (yyyy/mm/dd hh:mm:ss) 2023/06/01 00:00:00 - 2023/06/30 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) | |
|--------------------------------------|------------|--------------|---|---|------------|
| 22946339 | 60008267 | HeatheWoo385 | APOPO010 - Expiring Registration Report | 2023/06/28 08:56:12 | Distribute |

- Product for APOPO010 - Expiring Registration Report is available for viewing. [2023/06/28 08:56:24]
- Successfully submitted distribution request for APOPO010 - Expiring Registration Report. [2023/06/28 08:56:13]
- No messages found.