

# Alberta Personal Property Registry Electronic System (APPRES)

# Registration User Guide

**Please note:** The material in this package was prepared by PPR business support staff and is intended to assist users with registration functionality in APPRES. It is not intended to provide legal advice.



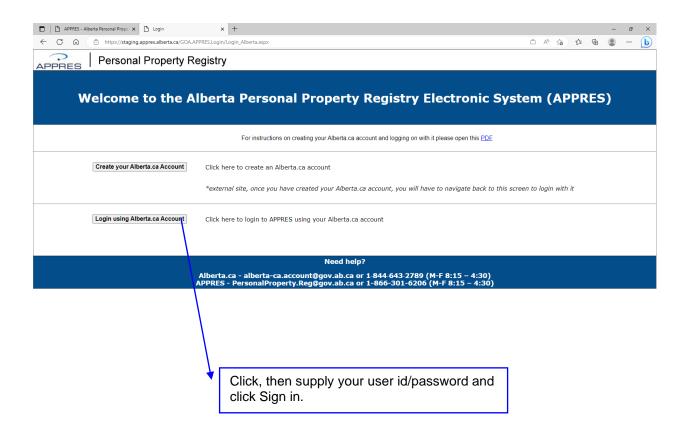
#### **Getting Started**

You will require an Alberta.ca Account to access APPRES. Refer to the APPRES Affiliation Guide for instructions on creating a user id and password.

Once you have a user id/password, navigate to APPRES at this location:

#### https://appres.alberta.ca

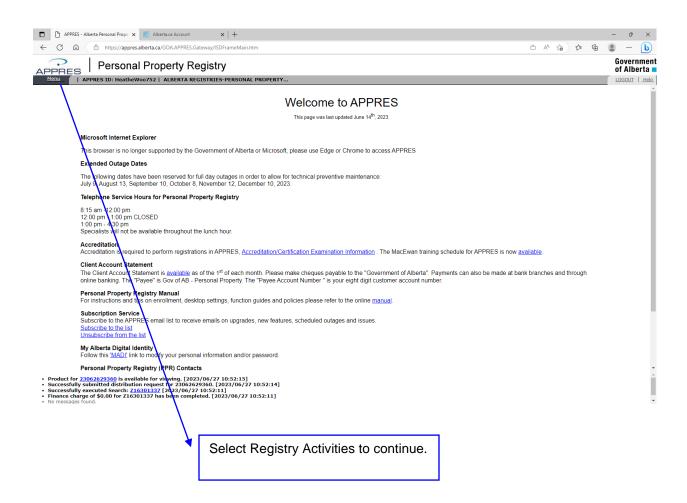
Click Login using Alberta.ca Account and supply your User ID/password and click "Sign in".



#### **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 "Registry Activities" from the list.

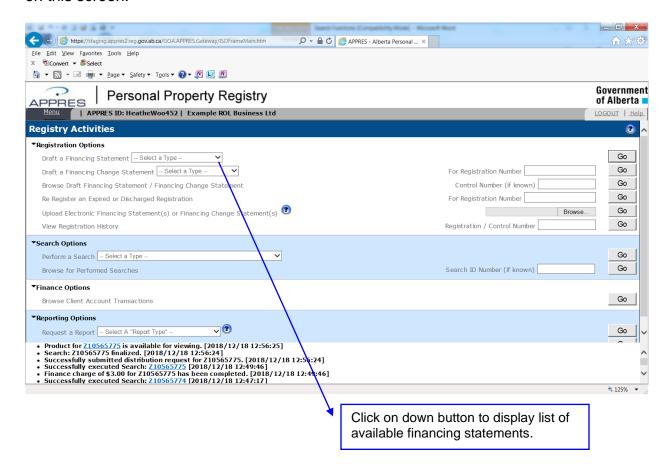


#### **Registry Activities**

Some of the options on this screen may not appear on your screen depending on your security settings.

Under "Registration Options" click on the down arrow beside "Draft a Financing Statement".

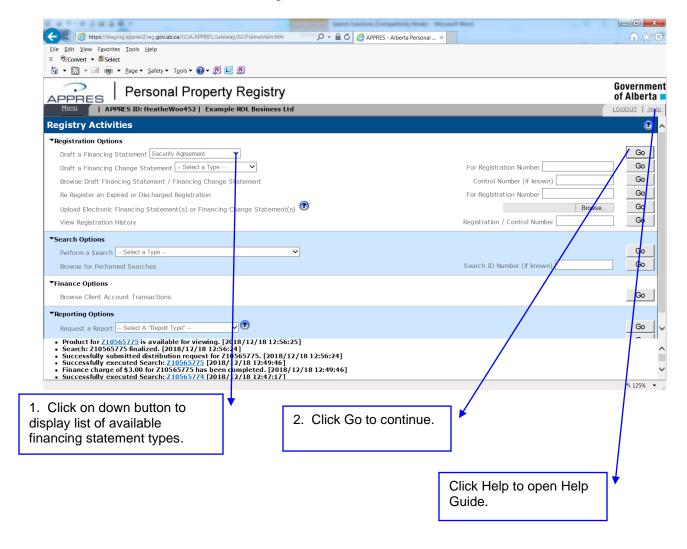
Refer to the Help Guide under the "Registry Activities" section for additional information on this screen.



#### **Draft a Financing Statement**

A list of financing statements available to your organization will appear. A detailed explanation of each financing statement type can be found in the Help Guide. Click on the help icon in the upper left hand corner to open the guide.

As an example, some details from the Security Agreement financing statement have been used in the creation of this guide.



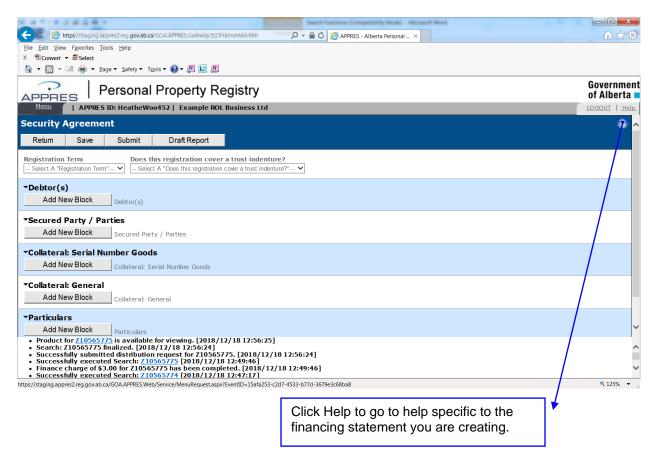
#### **Navigation Buttons**

The page will refresh with the details necessary to create a financing statement, these details will vary depending on the financing statement type selected.

The navigation buttons below the Security Agreement text (these buttons appear on all financing statement types) will do this if clicked:

- Return returns you to the Registry Activities screen
- Save assigns a control number and saves the draft financing statement (must be a minimum amount of information provided before the save will complete)
- Submit submits the draft financing statement for registration (all the data necessary to submit the registration must be provided for the submit to be successful)
- Draft Report creates a PDF of the draft financing statement

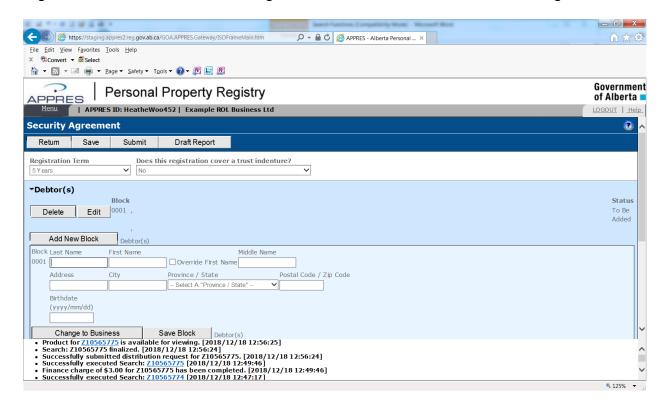
Click the Help icon that looks like this for detailed help on the financing statement you are creating.



#### **Registration Term**

Depending on the financing statement chosen, you may have the option of selecting a registration term. In this example a security agreement financing statement requires a registration term and a response to the 'Does this registration cover a trust indenture' question be supplied as part of the registration details.

Most financing statements have a set term, for example, a Garage Keepers' Lien has a registration term of 6 months. A registration term that is set cannot be changed.

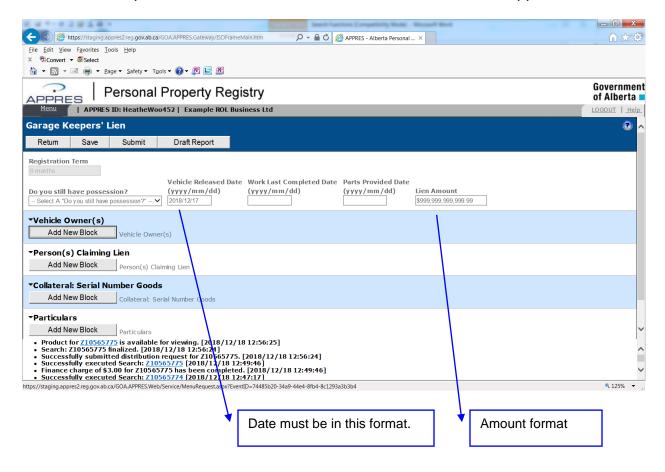


#### **Date and/or Amount Details**

If the financing statement you are creating permits you to supply a date or an amount, these details must be supplied in this format:

- Date YYYY/MM/DD (e.g. 2007/12/03)
- Amount to a maximum of \$999,999,999,999.99

This is an example of how the date format and amount format would appear:

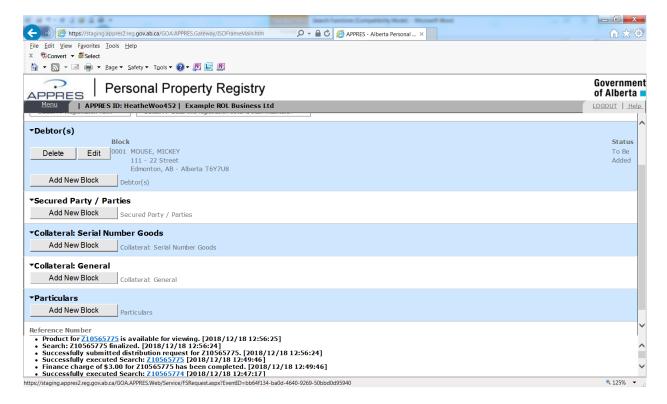


#### **Individual Debtor Name Details**

Click "Add New Block" under the text "Debtor" to provide the details for an individual debtor (individual debtor type is the default debtor type), click "Save Block" to save the details. The name of the block may vary depending on the financing statement you are creating, refer to the Help Guide for the financing statement you are creating if you require additional assistance.

The following details are required when describing an individual debtor:

- Last Name maximum of 70 characters
- First Name maximum of 35 characters
- Middle Name (optional) maximum of 35 characters
- Address maximum of 40 characters
- City maximum of 35 characters
- Province one from the drop-down list.
- Postal Code (optional) maximum 10 characters
- Birthdate (optional) must be provided in YYYY/MM/DD format

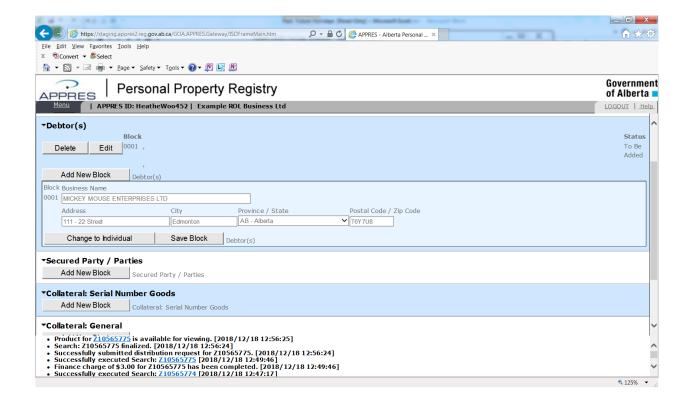


#### **Business Debtor Name**

Click "Add New Block" under the text "Debtor" to provide the details for a business debtor (click "Change to Business" to supply Business debtor name details), click "Save Block" to save the details.

The following details are required when describing a business debtor:

- Business Name maximum of 80 characters
- Address maximum of 40 characters
- City maximum of 35 characters
- Province one from the drop-down list.
- Postal Code (optional) maximum 10 characters

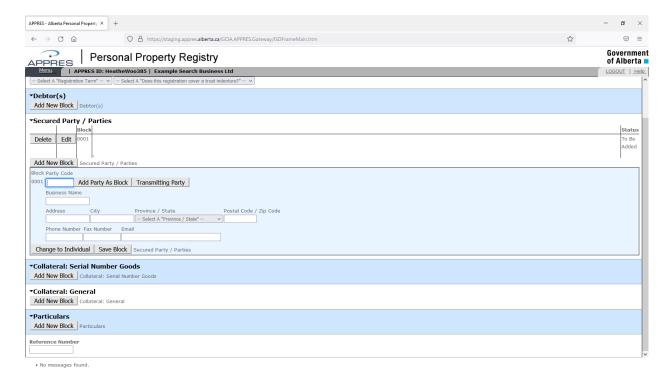


#### **Business Secured Party**

Click "Add New Block" under the text "Secured Party" to provide the details for a business secured party, click "Save Block" to save the details. The name of this block will vary depending on the financing statement you are creating. For example, on a Garage Keepers' Lien; the block name is "Person(s) Claiming Lien". Refer to the Help Guide for the financing statement you are creating if you require assistance.

The following details are required when describing a business secured party:

- Party Code (optional) supply a party code (e.g. 500000001) and click add party as Block to copy the name, address, phone fax number of the party code into the secured party block. If the organization you are signed on as is the secured party, click "Transmitting Party" to copy the details from your party code into the secured party block. The name and address details cannot be modified.
- Business Name maximum of 80 characters
- Address maximum of 40 characters
- City maximum of 35 characters
- Province one from the drop-down list.
- Postal Code (optional) maximum 10 characters
- Phone / Fax Number (optional) must be in 999-999-9999 format
- Email Address must be in example@example.com format

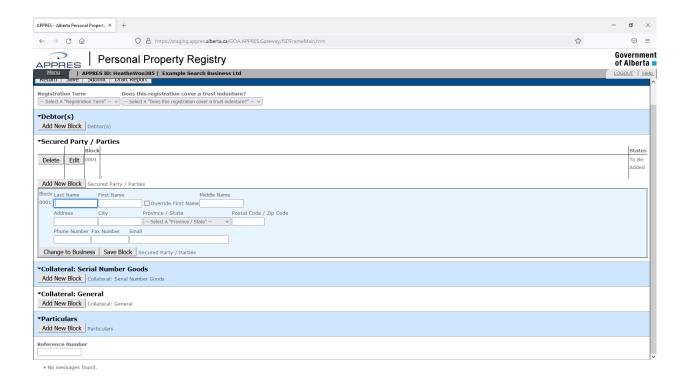


#### **Individual Secured Party**

Click "Add New Block" under the text "Secured Party" to provide the details for an Individual secured party (click "Change to Individual" to supply Individual secured party name details), click "Save Block" to save the details.

The following details are required when describing an individual secured party:

- Last Name maximum of 70 characters
- First Name maximum of 35 characters
- Middle Name (optional) maximum of 35 characters
- Address maximum of 40 characters
- City maximum of 35 characters
- Province one from the drop-down list.
- Postal Code (optional) maximum 10 characters
- Phone / Fax Number (optional) must be in 999-999-9999 format
- Email Address must be in example@example.com format

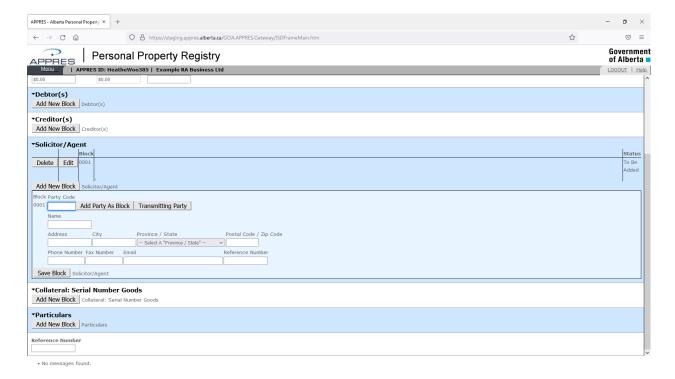


#### **Solicitor / Agent Details**

If the financing statement requires a Solicitor/Agent be described click "Add New Block" under the text "Solicitor/Agent" to provide the details, click "Save Block" to save the details.

The following details are required when describing a Solicitor / Agent:

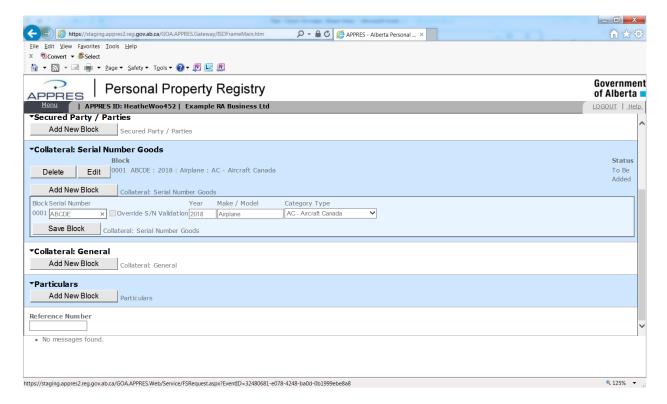
- Party Code (optional) supply a party code (e.g. 500000001) and click add party as Block to copy the name, address, phone fax number of the party code into the solicitor / agent block. Click "Transmitting Party" to copy the details from your party code into the solicitor / agent block (if you are the solicitor / agent). The name and address details cannot be modified.
- Business Name maximum of 80 characters
- Address maximum of 40 characters
- City maximum of 35 characters
- Province one from the drop-down list.
- Postal Code (optional) maximum 10 characters
- Phone / Fax Number (optional) must be in 999-999-9999 format
- Email Address must be in example@example.com format
- Reference Number (optional) maximum 20 characters



#### Serial Number Goods Collateral

If the financing statement you are creating permits a serial number goods description the following details are required:

- Serial Number maximum of 25 characters (will be truncated to the last 18 if more than 18 characters supplied)
- Year must be 4 characters
- Make/Model maximum of 25 characters
- Category Type one from the drop-down list



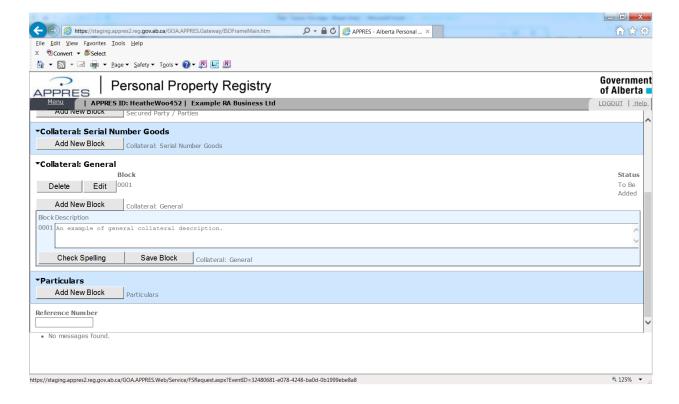
#### **General Collateral**

If you want to add a General Collateral description to the financing statement you are creating the following details are required:

 A text description containing at least 1 character to a maximum of 2000 characters

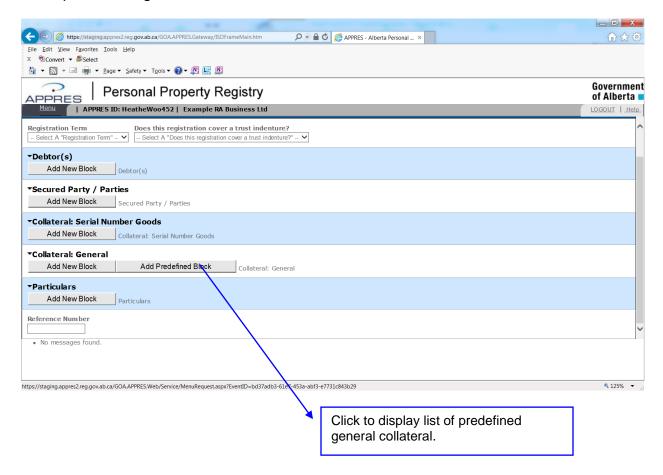
Click on "Check Spelling" if you wish to check the spelling of the text, please note this is not an advanced spell checker tool and may not reveal all spelling errors.

Click "Save Block" to save the description.



#### **Predefined General Collateral**

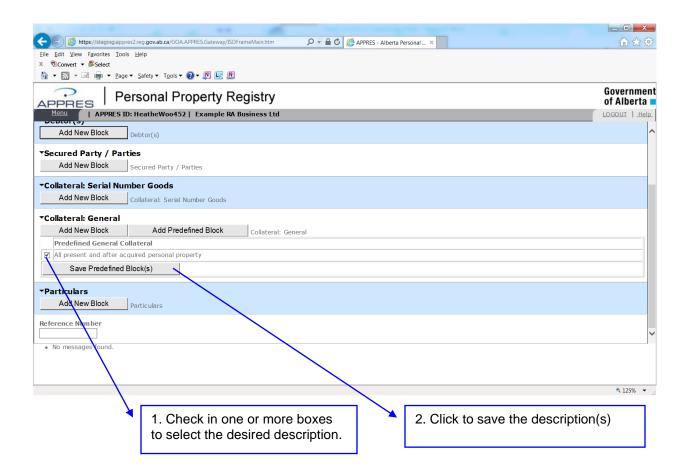
If you have created and saved one or more predefined collateral description in the "Maintain Preferences" screen, you will have the ability to add one or more of those descriptions if the "Add Predefined Block" appears on your screen. Click to show the list of predefined general collateral.



#### **Predefined General Collateral - Continued**

Click to show the list of predefined general collateral (up to 15 can be saved, for this example only 1 is in the list).

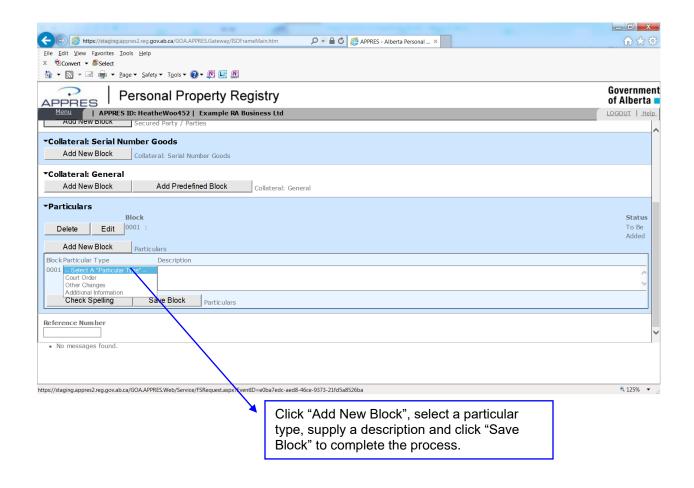
You do not have to use the descriptions if not required, click "Add New Block" to open a blank block of general collateral which will enable you to supply a description.



#### **Particulars**

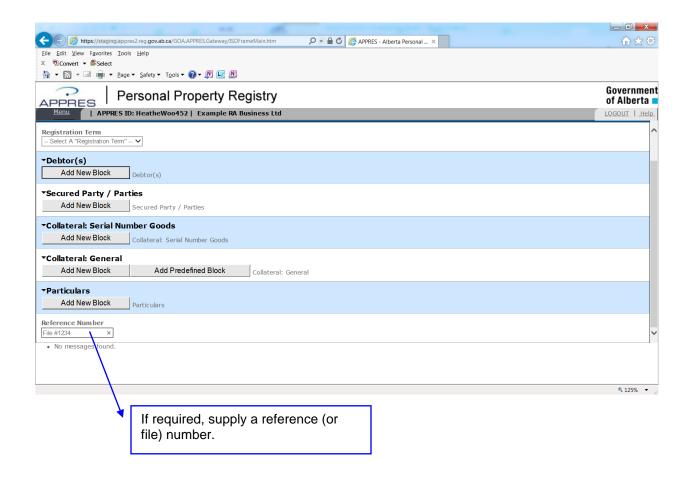
A particulars description can be provided on any financing statement or financing change statement type if required. Click on "Add New Block", select the appropriate particular type from the drop-down menu, provide a description and click "Save Block" to complete the process.

If you have created and saved one or more predefined particulars in the "Maintain Preferences" screen, you will have the ability to add one or more of those descriptions if the "Add Predefined Block" appears on your screen. Click to show the list of predefined particulars. Follow the instructions under the Predefined General Collateral section for additional information on selecting and saving predefined particulars.



#### **Reference Number**

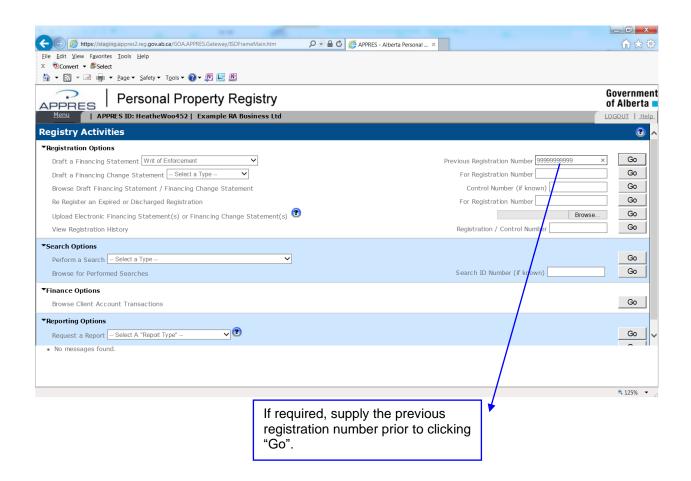
All financing statement and financing change statement types permit a reference number to be supplied. This is optional and will appear on the banner page of a Verification Statement.



#### **Previous Registration Number**

If the financing statement you are creating permits you to supply a previous registration number, that number must be supplied prior to clicking "Go".

In this example, a Writ of Enforcement financing statement has been selected, the previous registration number field appears, if required supply the previous registration number as indicated on the Writ of Enforcement form. Click "Go" if there is no previous registration number indicated.



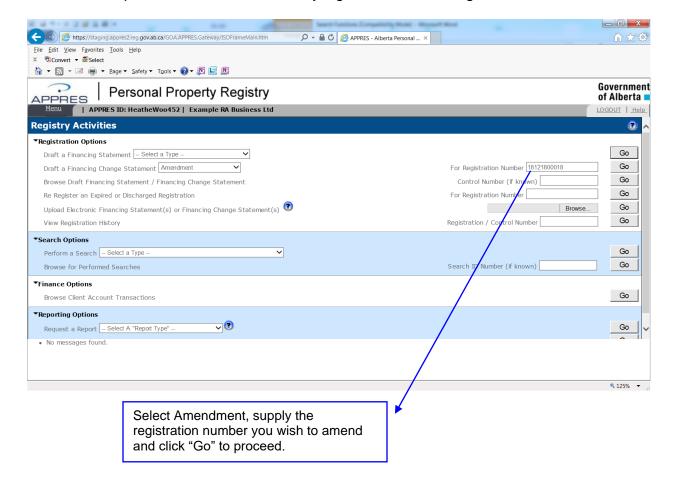
#### **Draft a Financing Change Statement**

To draft a financing change statement, select the appropriate type of change you wish to make from the drop-down list beside the text "Draft a Financing Change Statement" and supply the registration number that you wish to make a change to. Depending on the registration type you can draft a financing change statement to:

- Amend the registration details
- Renew a registration (if the registration expiry date is not Infinity)
- Amend and Renew at the same time (if the registration expiry date if not Infinity)
- Discharge a registration

Refer to the Help Guide under *Discharges*, *Amendment* or *Renewal* section for detailed assistance in performing these registration types.

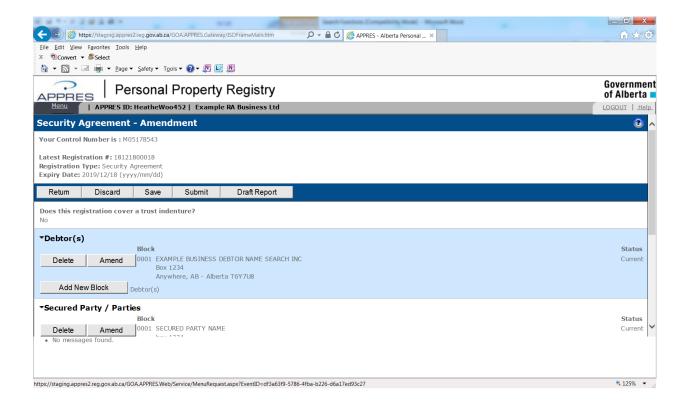
For this example, the details of a Security Agreement are being amended.



#### **Navigation Buttons**

The navigation buttons below the Security Agreement - Amendment text (these buttons appear on all financing change statement amendment types) will do this if clicked:

- Return returns you to Registry Activities screen (the draft financing change statement will not be discarded if this is clicked)
- Save saves any changes you have made
- Discards deletes the financing change statement (this permits another user to access the registration)
- Submit submits the draft financing change statement for registration (all the data necessary to submit the registration must be provided for the submit to be successful)
- Draft Report creates a PDF of the draft financing change statement

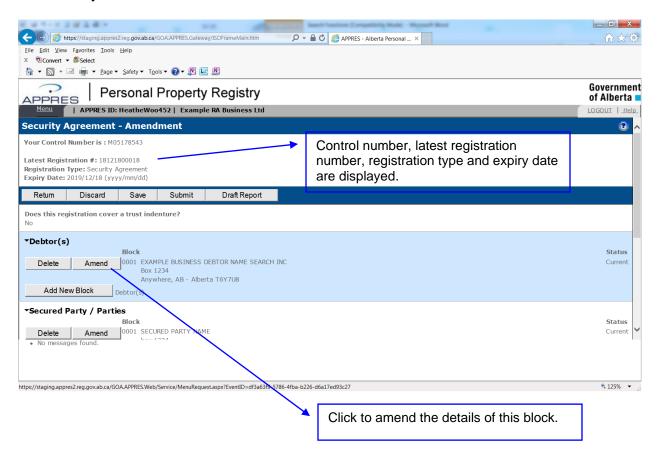


#### **Draft an Amendment**

The registration details are displayed; you should confirm the details to ensure you are amending the correct registration. In this example a Security Agreement is the registration type. The following registration details are considered a "Block" of information:

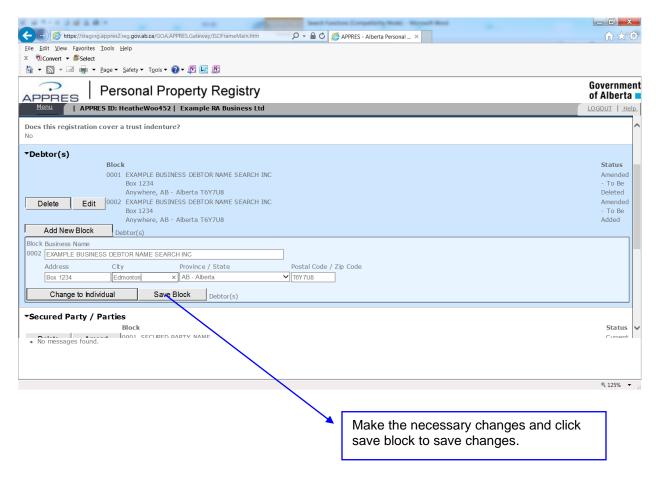
- Debtor
- Secured Party
- Solicitor/Agent
- Collateral (Serial Number Goods and General)
- Particulars

Please refer to the Help Guide under the "Amendment" section for a detailed explanation of block information. To amend the details of a block, click "Amend" beside the block you wish to amend. The details of the block are copied into the next available block and you are able to amend the text.



#### **Draft an Amendment - continued**

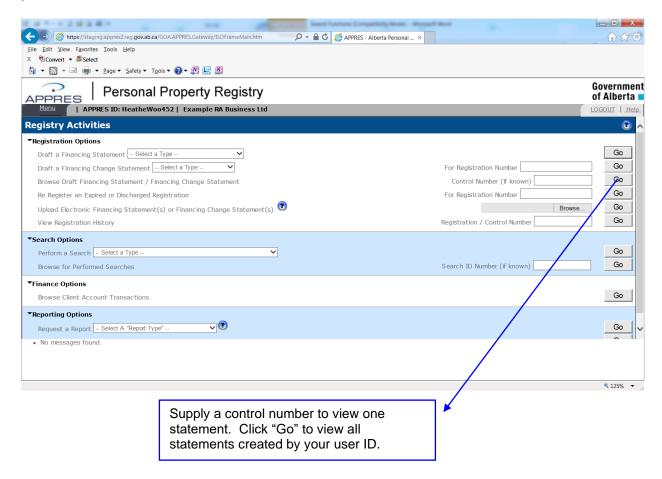
The status of the existing block is displayed as "Amended – to be deleted" and the new block has a status of "Amended – to be added". The status of the block will be updated to "Deleted" and the new block to "Current" once the amendment has been submitted for registration.



# **Browse Draft Financing Statement / Financing Change Statement**

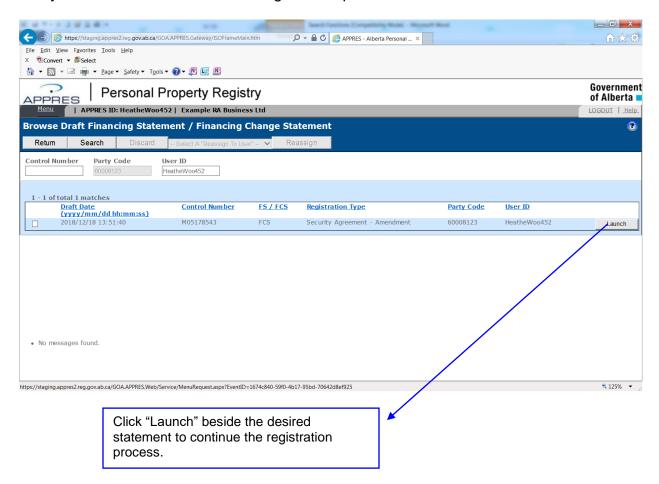
To view a financing statement or financing change statement that has not been submitted for registration, supply the control number of the statement and click "Go".

Click "Go" without supplying a control number to view of list of all statements created by you.



# **Browse Draft Financing Statement / Financing Change Statement - continue**

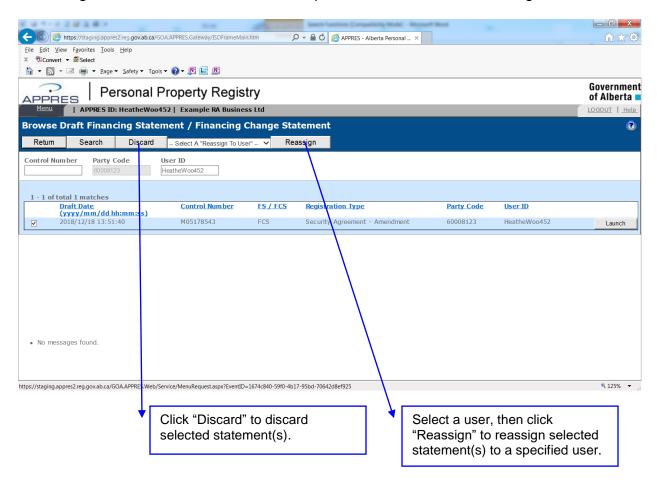
A list of statements will be displayed; click "Launch" beside the applicable statement that you wish to continue with the registration process.



# **Browse Draft Financing Statement / Financing Change Statement - continue**

To discard one or more statements, click in the checkbox beside the statement(s) you wish to discard then click "Discard" at the top of the screen.

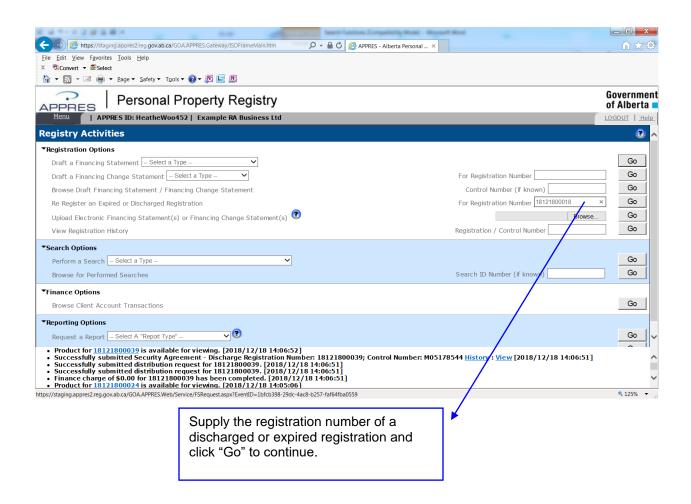
To reassign one or more statements to another user within your organization, click in the checkbox beside the statement(s) you wish to reassign, select a user that you wish to reassign the statements to from the drop-down list, then click "Reassign".



#### Re Register an Expired or Discharged Registration

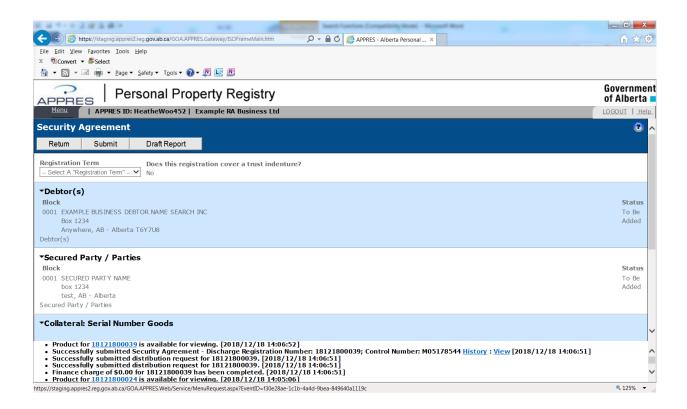
Supply the registration number of a discharged or expired registration and click "Go" to continue.

Refer to the Help Guide for detailed information on this process under Re Registration of a Security Agreement or Re Registration of a Writ of Enforcement or Writ of Seizure and Sale (Federal Writ).



# Re Register an Expired or Discharged Registration - continued

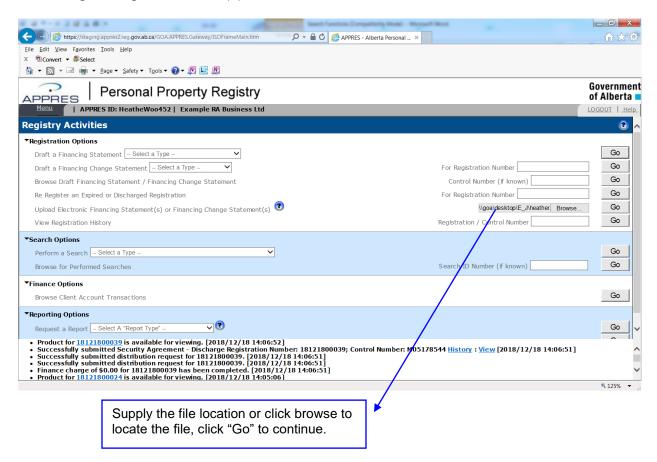
All the non block and current blocks are displayed; you cannot add or make changes to the information. Verify the information is correct, in this example a registration term must also be specified prior to clicking "Submit". Once registered, you can make changes to the registration details by performing an amendment (if required).



# **Upload Electronic Financing Statement(s) or Financing Change Statement(s)**

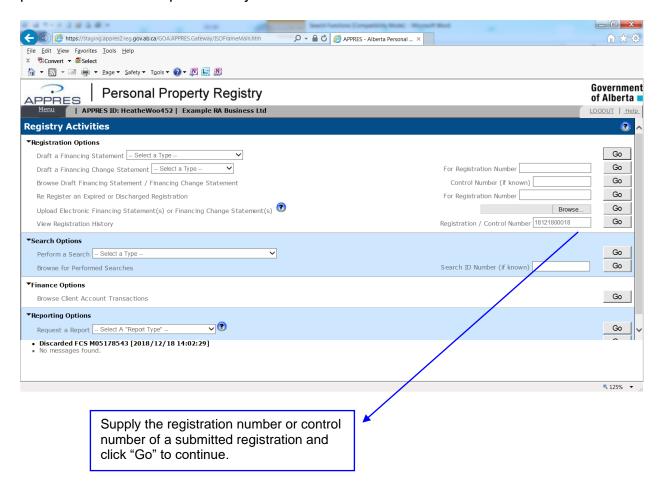
Supply the file location of the file that you wish to upload and click "Go". Or click "Browse" to browse for the file.

Refer to the Help Guide under the section "Upload Electronic Financing Statement(s) or Financing Change Statement(s)" for additional information.



#### **View Registration History**

Supply the registration number or control number of a registration that had been performed within the past 90 days and click "Go".



#### **View Registration History - continue**

The registration information is retrieved and the following details are displayed:

- Registration Number, Control Number and Reference Number (if one had been supplied at the time of registration)
- APPRES User ID, Date and time registration was initially drafted. APPRES User ID, date and time registration was submitted. Party Name that the user drafted and submitted registration for.
- Date, time, APPRES User ID, party code of the party and method Verification Statement was last distributed. If the Verification Statement was distributed to a destination that required additional details such as a fax number, the fax number it was sent to will be shown under "Distribution Details"

The Verification Statement can be Re-Distributed for 90 days, select a distribution method from the bottom of the screen and click "Re-Distribute" to continue.

