



# Alberta Personal Property Registry Electronic System (APPRES)

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## Site Coordinator (ROL) User Guide

This package provides step by step instructions on how to approve an affiliation request from within the Alberta Personal Property Registry System (APPRES).

This package should be provided to the individual(s) in your organization that has been designated as the APPRES site coordinator.

Updated April 2023



# ROL APPRES Site Coordinator Instructions

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## Getting Started

The instructions in this package are intended for your APPRES site coordinator and detail in step-by-step format how to approve a request for affiliation to your organization from an employee.

An APPRES site coordinator is the individual that is responsible for reviewing, approving, rejecting and terminating access to APPRES for an employee.

### ***Approval of Site Coordinator***

**PLEASE NOTE:**

Approval of a designated site coordinator is performed by Personal Property Registry (PPR) staff. Contact PPR in the method described below if you are the designated site coordinator and require approval.

In addition, there must be a pending request for affiliation to enable PPR staff to approve you as a site coordinator. This means you have obtained an Alberta.ca Account, enrolled in APPRES and requested affiliation to your organization.

If you are the designated site coordinator for your organization and require approval please send an email to Personal Property Registry at [PersonalProperty.Reg@gov.ab.ca](mailto:PersonalProperty.Reg@gov.ab.ca) and include the following details:

- Personal Property Registry Client Account number
- APPRES User ID
- Your name, address and phone number
- Affiliation code for your organization

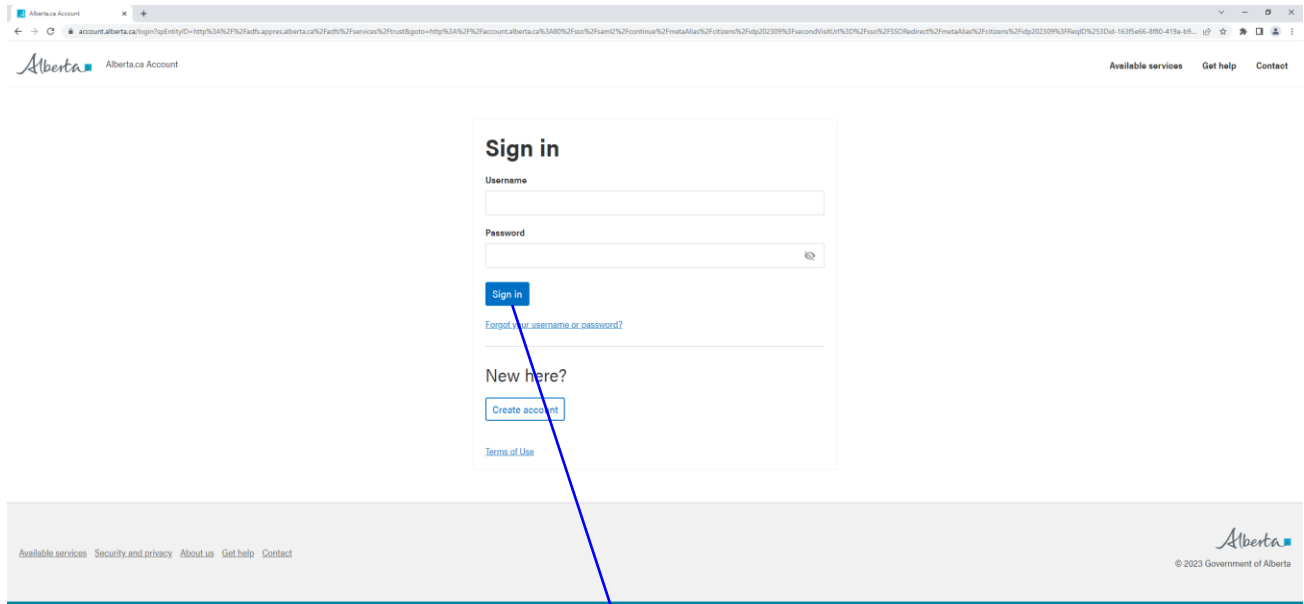
# ROL APPRES Site Coordinator Instructions

## Sign in

To approve a request for affiliation you would begin by logging onto APPRES. Navigate to this location to begin:

<https://appres.alberta.ca/>

Supply your username and password and click “Sign in” to continue.



The screenshot displays the 'Sign in' form on the Alberta Account website. The form includes a 'Username' field, a 'Password' field with a visibility toggle, a blue 'Sign in' button, a link for 'Forgot your username or password?', a 'New here?' section with a 'Create account' button, and a 'Terms of Use' link. A blue arrow points from the 'Sign in' button to a text box below the page.

Supply your user name and password and click Sign in to begin.

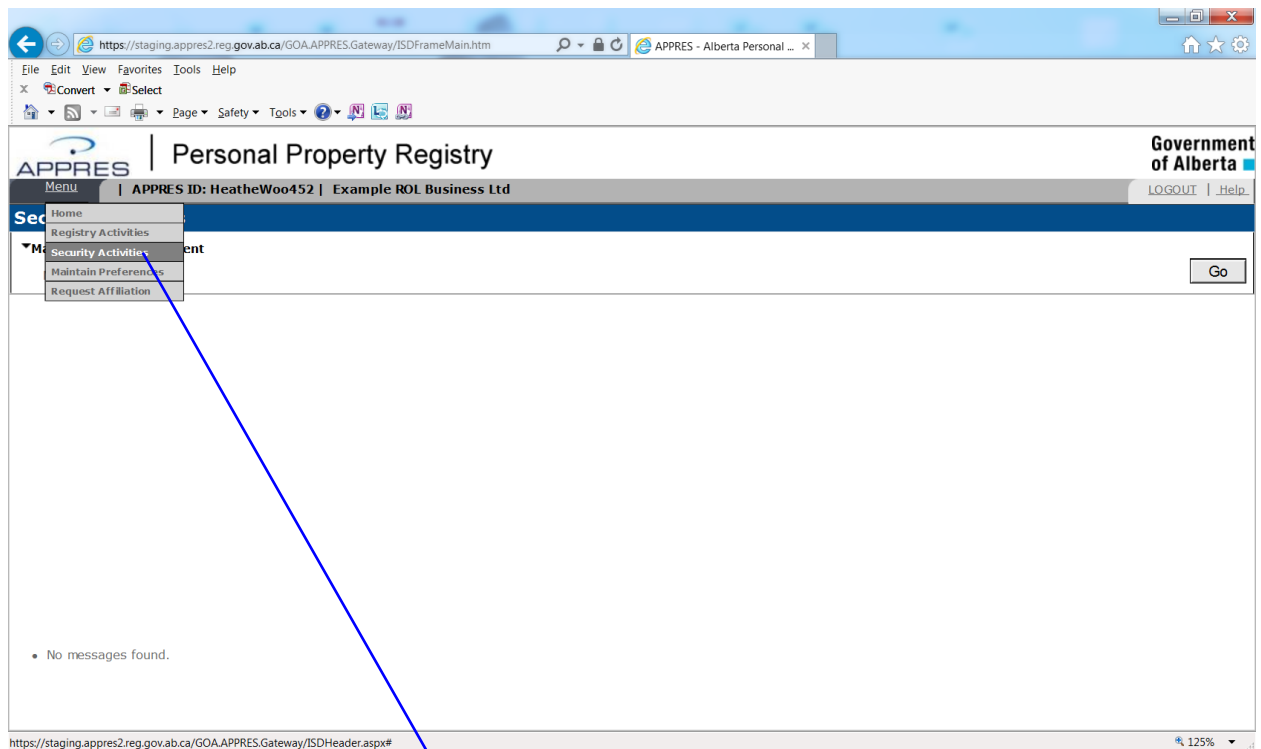
# ROL APPRES Site Coordinator Instructions

## Security Activities

Once logged in maneuver your cursor over the “Menu” text located in the upper left hand area of the screen. A dropdown list will appear, move your cursor down to “Security Activities” and click to continue.

### PLEASE NOTE:

You will only have the Security Activities option if you are the site coordinator. If you are the site coordinator for your organization and do not have this option contact Personal Property Registry staff as described in the “Getting Started” section earlier in this material to obtain this option.

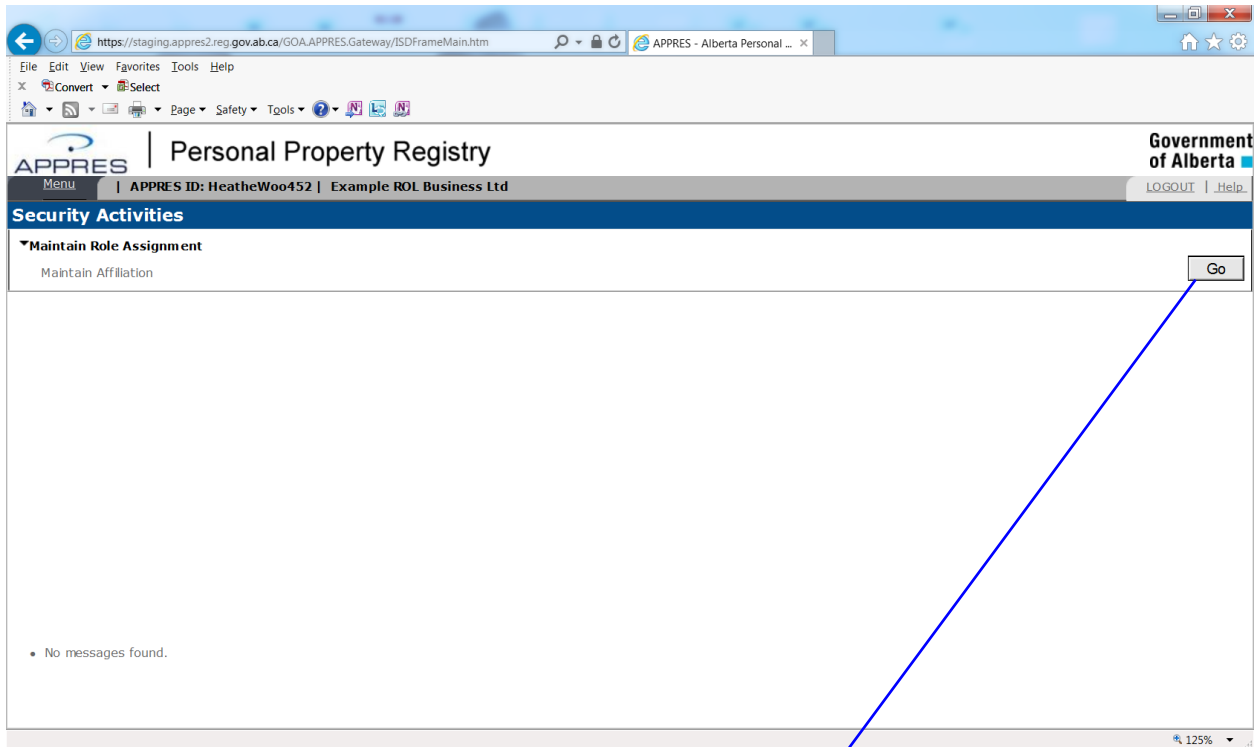


Click Security Activities to continue.

# ROL APPRES Site Coordinator Instructions

## Maintain Affiliation

Once the Security Activities page is displayed. Click “Go” beside Maintain Affiliation to continue.



Click “Go” to continue.

# ROL APPRES Site Coordinator Instructions

## Maintain Affiliation - Browse

The affiliation code for your organization is the default search criteria and cannot be changed. Clicking “Search” will return all users affiliated to your organization regardless of their status.

You can choose to filter the request to a specific user of your organization or by an affiliation status by supplying one or more of the following:

- APPRES User ID
- Affiliation status

For this example, the affiliation status “Requested – Pending Approval” has been selected. Click “Search” to continue.

APPRES Personal Property Registry  
Government of Alberta

Menu | APPRES ID: HeatheWoo452 | Example ROL Business Ltd | LOGOUT | Help

### Maintain Affiliation - Browse

APPRES User ID:  ASAS User ID:  Affiliation Code: AC18247735 Affiliation Status: **Select a "Affiliation Status"**

0 Items Found

Affiliation Code	Party Name	APPRES User ID	User Name	Site Coordinator	Affiliation Status
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• No messages found.

Click “Search” to continue.

You may choose to filter the list to view only those requests that are pending approval by selecting this status.

# ROL APPRES Site Coordinator Instructions

## Pending Approval

The page should refresh with any request for affiliation that is pending approval of the site coordinator.

To review / approve the pending request, click on the hyperlink under “Affiliation Code” for a specific user. In this example there is only one user in the list.

The screenshot shows a web browser window displaying the APPRES Personal Property Registry. The page title is "Maintain Affiliation - Browse". The browser address bar shows the URL: https://staging.appres2.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm. The page header includes the APPRES logo and the text "Personal Property Registry" and "Government of Alberta". The user is logged in as "APPRES ID: HeatheWoo452 | Example ROL Business Ltd".

The main content area shows a search form with the following fields:

- APPRES User ID: [Empty]
- ASAS User ID: [Empty]
- Affiliation Code: AC18247735
- Affiliation Status: Requested - Pending Approval

Below the search form are "Search" and "Return" buttons. The search results show 1 match:

Affiliation Code	Party Name	APPRES User ID	ASAS User ID	User Name	Site Coordinator	Affiliation Status
<a href="#">AC18247735</a>	Example ROL Business Ltd	BarneyRub427	B.Rubble9895	Rubble, Barney	<input type="checkbox"/>	Requested - Pending Approval

Below the table, it says "No messages found." A blue arrow points from the "AC18247735" link in the table to a text box below the screenshot.

Click on the affiliation code to continue.

# ROL APPRES Site Coordinator Instructions

## Maintain Affiliation

The page will refresh and detail about your organization and the user requesting affiliation should appear under “Affiliation Information”. You should carefully review this information to ensure this is a user you wish to approve. Once approved a user will be able to sign onto APPRES and perform search and registration functions (if the user is accredited for registration functions). The charges incurred are the responsibility of the organization.

If you wish to approve the user, change the affiliation status from “Requested – Pending Approval” to “Approved” by clicking in the radio button to the left of “Approved”.

The “Role Assignment” section that appears below the “Affiliation Information” section is explained in detail later in this material.

The screenshot shows the APPRES web application interface. The browser address bar indicates the URL: <https://staging.appres2.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page title is "Personal Property Registry" and the user is logged in as "APPRES ID: HeatheWoo452 | Example ROL Business Ltd".

The main content area is titled "Maintain Affiliation" and is divided into two sections:

- Affiliation Information:** This section displays details for the organization and the user.

Party Name:	Example ROL Business Ltd	Party Code:	60008116
Party Status:	Active	Physical Address:	12345 - 67 Street NW Edmonton, AB - Alberta T6Y7U8
User Name:	Rubble, Barney	Affiliation Code:	AC18247735
ASAS ID:	B.Rubble9895	APPRES User ID:	BarneyRub427
Affiliation Status:	<input type="radio"/> Requested - Pending Approval <input type="radio"/> Pending GOA Approval <input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Terminated		
- Role Assignment:** This section lists various roles with checkboxes and radio buttons for selection.

Role	Optional	Recommended	Mandatory
<input checked="" type="checkbox"/> Business Debtor Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Business Secured Party Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Certificate of Expired or Discharged Registration Number Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Crown Charge	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Expiring Registration Report	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Garage Keepers' Lien ROL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Individual Debtor Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

A blue arrow points from the "Approved" radio button in the "Affiliation Status" section to a text box below the screenshot.

Click in the radio button beside “Approved” to continue approval process.



# ROL APPRES Site Coordinator Instructions

## Role Assignment

Role Assignment is the list of tasks that a user may be able to perform. A user will only be able to perform an accredited task as long as that user has been accredited for it even if you grant that user the role assignment in this process.

The role assignments available to a user will default to those that your organization has been authorized to perform. You may choose to remove or grant a user the ability to perform one or more role assignments by adding or removing the checkmark from beside a specific role assignment. (Please see Description of Role Assignment section later in this material for a detailed explanation of each role and the affect of adding or removing a role.)

Role assignments that are considered optional will appear without a checkmark in the box. If you wish to grant a user an optional role assignment click in the box beside the role assignment(s) you wish to grant. (In this example all the roles were granted to this user)

Click "Save" to continue.

The screenshot displays the APPRES Personal Property Registry interface. The header includes the APPRES logo, the text 'Personal Property Registry', and the Government of Alberta logo. The user's APPRES ID is 'HeatheWoo452' and the organization is 'Example ROL Business Ltd'. The main content area lists various tasks with checkboxes and radio buttons for 'Optional', 'Recommended', and 'Mandatory' selection. The 'Save' button is highlighted in blue. A blue arrow points from the 'Save' button to a text box.

Task	Optional	Recommended	Mandatory
<input checked="" type="checkbox"/> Register Transmitting Party User	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Registration Number Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Report Requestor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Sale of Goods or Factors Act	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Search Customizations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Search Transmitting Party User	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Security Agreement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Serial Number Collateral Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Statutory Charge	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Supervisor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Upload Electronic PPR Statement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Account Holder	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Site Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Buttons: Return, Reset, Save

Messages:

- Successfully retrieved information [2018/12/18 10:10:43]
- No messages found.

Click "Save" to continue approval process.

# ROL APPRES Site Coordinator Instructions

## Approval of Request - Save

The page will refresh and you will need to confirm the role assignments (or changes) you have granted this user.

Click “Continue” to complete the approval process.

The screenshot shows a web browser window with the URL <https://staging.appres2.reg.gov.ab.ca/GOA.APPRES.Gateway/ISDFrameMain.htm>. The page title is "Personal Property Registry" and the user is logged in as "APPRES ID: HeatheWoo452 | Example ROL Business Ltd".

The main heading is "Maintain Affiliation". Below it, a message states: "By confirming the save of this information you are agreeing to grant this user the identified Roles and/or to change this user's Affiliation Status. Press **Continue** to Proceed. Press **Cancel** to return to the form in progress." There are "Continue" and "Cancel" buttons.

The "Affiliation Information" section shows:

Party Name:	Example ROL Business Ltd	Party Code:	60008116
Party Status:	Active	Physical Address:	12345 - 67 Street NW Edmonton, AB - Alberta T6Y7U8
User Name:	Rubble, Barney	Affiliation Code:	AC18247735
ASAS ID:	B.Rubble9895	APPRES User ID:	BarneyRub427
Affiliation Status:	<input type="radio"/> Requested - Pending Approval <input type="radio"/> Pending GOA Approval <input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Terminated		

The "Role Assignment" section shows two roles with radio button options:

<input checked="" type="checkbox"/> Business Debtor Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Business Secured Party Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory

At the bottom, there is a log of events: "Successfully retrieved information [2018/12/18 10:10:43]" and "No messages found."

Click “Continue” to complete save.

# ROL APPRES Site Coordinator Instructions

## Approval of Request - Complete

The page will refresh and the affiliation status for this user has been updated to “Approved”, this user will now be able to access APPRES. It is recommended that the site coordinator notify the user of the approval.

The screenshot shows a web browser window displaying the APPRES Personal Property Registry website. The page title is "Personal Property Registry" and the user is logged in as "Example ROL Business Ltd". The page is titled "Maintain Affiliation" and contains the following information:

**APPRES | Personal Property Registry**  
Menu | APPRES ID: HeatheWoo452 | Example ROL Business Ltd | LOGOUT | Help

**Maintain Affiliation**

**▼ Affiliation Information**

<b>Party Name:</b>	Example ROL Business Ltd	<b>Party Code:</b>	60008116
<b>Party Status:</b>	Active	<b>Physical Address:</b>	12345 - 67 Street NW Edmonton, AB - Alberta T6Y7U8
<b>User Name:</b>	Rubble, Barney	<b>Affiliation Code:</b>	AC18247735
<b>ASAS ID:</b>	B.Rubble9895	<b>APPRES User ID:</b>	BarneyRub427

**Affiliation Status:**  Requested - Pending Approval  Pending GOA Approval  Approved  Rejected  Terminated

**▼ Role Assignment**

<input checked="" type="checkbox"/> Business Debtor Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Business Secured Party Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Certificate of Expired or Discharged Registration Number Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Crown Charge	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Expiring Registration Report	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Garage Keepers' Lien ROL	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Individual Debtor Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory

• Successfully retrieved document information [2018/12/18 10:13:15]  
• Successfully retrieved information [2018/12/18 10:10:43]  
• No messages found.

https://staging.appres2.reg.gov.ab.ca/GOA.APPRES.Stakeholder.Web/Service/MaintainSTKSEC.aspx?EventID=15206a04-663a-4709-b3d8-d86ea6ddbac8 125%

# ROL APPRES Site Coordinator Instructions

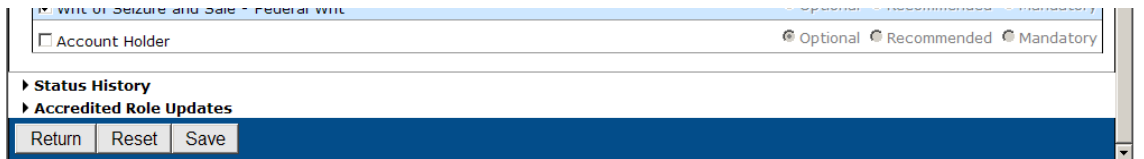
## Description of each Role Assignment

A role assignment allows a user to perform functions on APPRES. Granting or removing certain role assignments may affect other role assignments even if a role assignment has been granted to a user. For example, if you remove the role assignment “Search Transmitting Party User” the user will not be able to perform a search even if a search type role assignment has been granted. The following is a brief description of each role assignment and the effect of removing (or adding) the role assignment.

### Account Holder

This role assignment allows a user the ability to view “Browse Client Account” information under the Finance Option on the Registries Activities page.

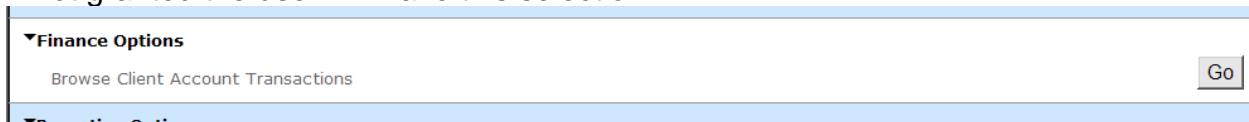
This role assignment is optional, by default this option is not checked, if you wish to grant a user this role assignment scroll to the bottom of the list of role assignments and click in the checkbox to the left of the text “Account Holder” click save and continue to grant complete the process.



If granted this role assignment the user will see this under Finance Options:



If not granted the user will have this selection:



### Report Requestor

The role “Report Requestor” allows a user to request the Expiring Registration Number report. It is recommended that the Report Requestor role remain checked.

### Register Transmitting Party User

This role allows a user to perform registration functions which include the ability to submit financing statement(s), financing change statement(s), or reregister an expired or discharged registration.

# ROL APPRES Site Coordinator Instructions

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The role “Register Transmitting Party User” allows a user to perform one or more of the registration types listed below. Removal of the Register Transmitting Party User role will prevent a user access to any of the registration types even if those roles are granted to a user.

- Security Agreement
- Garage Keeper’s Lien
- Crown Charge
- Land Charge
- Sale of Goods or Factors Act
- Statutory Charge

This is a mandatory role assignment and will always remain checked. You may choose to remove one or more of the registration types if necessary. The registration type removed will not appear in the list of registration types available to a user

## Re Register an Expired or Discharged Registration

This role allows a user to register to re register a registration that has expired or been discharged in the past 30 days. To successfully submit a re registration of an expired or discharged registration, the user must also have accreditation for the registration type. It is recommended that this role be granted to a user.

## Search Transmitting Party User

This role allows a user to perform one or more of the search types listed below. Removal of the Search Transmitting Party User role will not allow a user access to any of the search types even if a search type role assignment was granted to a user.

- Business Debtor Search
- Business Secured Party Search (only your organization)
- Certificate of Expired or Discharged Registration Number Search
- Individual Debtor Search
- Registration Number Search
- Serial Number Collateral Search

Below is what would appear under “Search Options” on the Registry Activities page if this role was removed:

The screenshot shows a web interface with the following elements:

- Top navigation: "Upload Electronic Financing Statement(s) or Financing Change Statement(s)" with a dropdown arrow, and "View Registration History".
- Search fields: "Registration / Control Number" with an input box and a "Go" button.
- Search Options section: A blue header with a dropdown arrow, containing "Browse Client Account Transactions" and a "Go" button.

It is recommended that the Search Transmitting Party User role always remain checked. You may choose to remove one or more of the search types listed. The search type removed will not appear in the list of search types available to a user.

## ROL APPRES Site Coordinator Instructions

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**PLEASE NOTE:**

You may wish to consider limiting the ability to perform a Business Secured Party search to certain users in your organization. This search retrieves all registrations where your party code had been used to record the secured party details during the registration process. The fee for this search is \$3.00 plus .50 cents for each registration returned. Depending on the volume of registrations your organization performs, initiating this search could be very costly.

**Supervisor**

This role allows a user to reassign financing statement(s) or financing change statement(s) that are in a draft status to another user within your organization. This is a recommended role.

**Upload Electronic PPR Statement**

This role allows a user to upload a file containing a security agreement financing statement or financing change statement. This process uploads the financing statement / financing change statement into a draft status in APPRES. This is a recommended role.

# ROL APPRES Site Coordinator Instructions

## Updates to Affiliation Status

It is the responsibility of the site coordinator to update the affiliation status to ensure a user no longer has access to APPRES. To update an affiliation status you would navigate to the Maintain Affiliation screen and select the user that you wish to update.

Failing to update the affiliation status for a user that should no longer have access to APPRES may result in the user continuing to access APPRES and charges being applied to your client account.

Click in the appropriate radio button and click save and continue to update the status.

Personal Property Registry  
APPRES ID: HeatheWoo452 | Example ROL Business Ltd  
LOGOUT | Help

### Maintain Affiliation

**▼ Affiliation Information**

Party Name:	Example ROL Business Ltd	Party Code:	60008116
Party Status:	Active	Physical Address:	12345 - 67 Street NW Edmonton, AB - Alberta T6Y7U8
User Name:	Rubble, Barney	Affiliation Code:	AC18247735
ASAS ID:	B.Rubble9895	APPRES User ID:	BarneyRub427

Affiliation Status:  Requested - Pending Approval  Pending GOA Approval  Approved  Rejected  Terminated

**▼ Role Assignment**

<input checked="" type="checkbox"/> Business Debtor Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Business Secured Party Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Certificate of Expired or Discharged Registration Number Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Crown Charge	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Expiring Registration Report	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Garage Keepers' Lien ROL	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory
<input checked="" type="checkbox"/> Individual Debtor Search	<input type="radio"/> Optional <input checked="" type="radio"/> Recommended <input type="radio"/> Mandatory

- Successfully retrieved document information [2018/12/18 10:13:15]
- Successfully retrieved information [2018/12/18 10:10:43]
- No messages found.

125%

Click in radio button to change status.