

ARELLO

Members Only Portal

User Guide for ARELLO® Members

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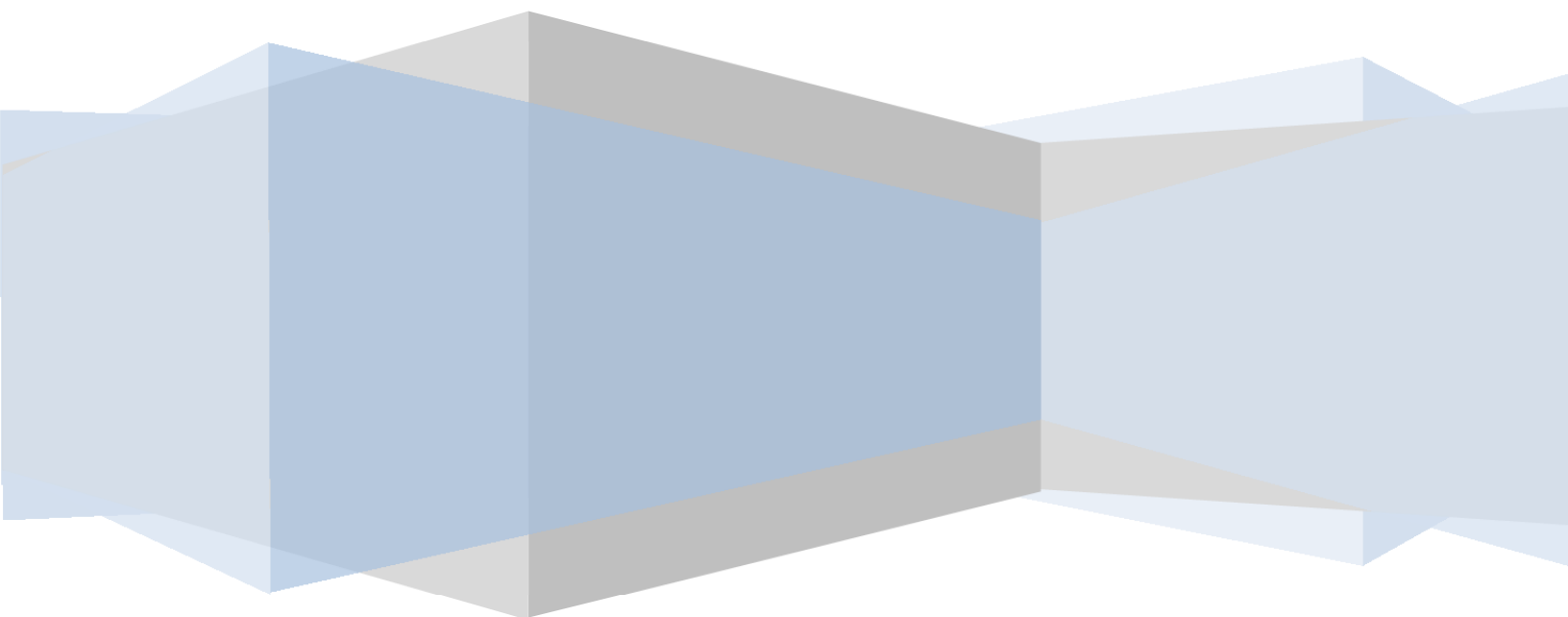


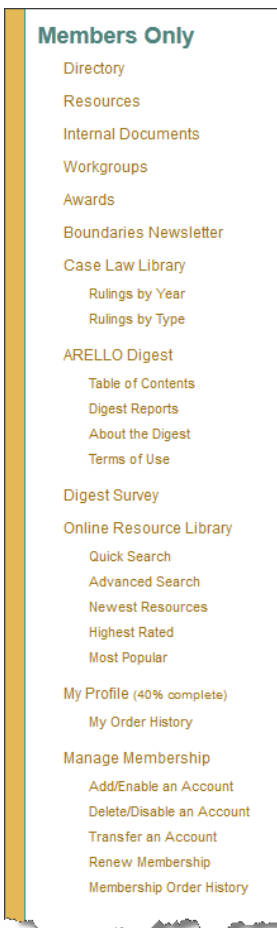
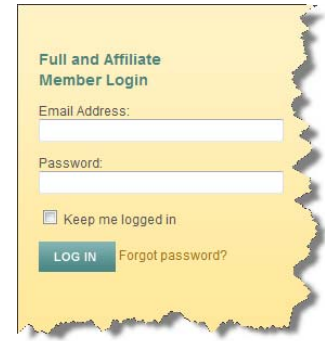
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ARELLO® Members Only Portal

Welcome to ARELLO’s new Members Only Portal with an online Membership Management System. This is a one-stop place to allow you as an account holder of an ARELLO® Membership to work with the ARELLO® Global Headquarters in managing your information.

Your adventure will start at <http://www.arello.org> where you will be able to log into the system. The log-in is composed of the e-mail address that is on file with the Global Headquarters and a password. If you don’t know your password or have never received one, then click the “Forgot Password” link, enter your e-mail address, and the system will generate and e-mail you a password. If you get an error message that reads, “The e-mail address you entered was not found in the database” then try a different e-mail address or contact the ARELLO IT Division to determine the e-mail address they have on file. Once you are logged in, you will be taken to the **Members Only Portal**.



General Navigation Information

Once you log in you will be redirected to your **Landing Page**. This landing page contains important information about resources and services that are available to you as a member. Along the left side of the screen you will find your main **Members Only Menu**.

- **Directory** – Allows you to find contact information for other members and account holders online.
- **Resources** – The resources area will provide access to archived newsletters, New Regulator Orientation Video, and directions for the ARELLO® List Serve.
- **Internal Documents** – Offers ready access to the association’s governing documents such as “Bylaws,” “Policies and Procedures”, budgets, and financial statements.
- **Workgroups** – Members who participate in ARELLO® workgroups are the backbone of ARELLO®. This area gives members access to workgroup rosters and files (e.g., minutes, agendas, etc...) for current and historical workgroups.
- **Awards** – Allows one to see the history of ARELLO® awards.
- **Boundaries Newsletter** – You can use this area to view current and historical Boundaries articles.
- **Case Law Library** - Here you will find an archive of the latest court rulings relating to real estate and administrative/license law in a convenient searchable form.

- **ARELLO® Digest** – Online and searchable access to the information published annually in the *ARELLO® Digest of Real Estate License Law and Current Issues*. Note: The ARELLO® Digest is available only as an extra subscription for Affiliate Members. This menu item might not appear if you don't have a valid subscription to this module.
- **Digest Survey** – If you are a designated Digest Survey Completer, then you may have this additional menu item that will grant you access to the necessary forms to complete the Digest Survey. Agency administrators designate who has permission to complete the Digest information.
- **Online Resource Library** – The resource library is a collection of thousands of articles, news announcements, presentations and other resources relating to the regulation of real property and is an excellent source for regulators to use to gather research on a particular issue.
- **My Profile** – Allows you to edit your own address, phone number, and other account information.
- **Manage Membership** – If you are an agency administrator, primary account holder for a membership, or have been delegated access by an agency administrator, then you may have this menu item. This area allows you to keep your regulatory agency's information up-to-date and "in-sync" with the Global Headquarters.

Data Tables

Many of these areas have a data table that displays pertinent information, and all of the tables work similarly. We will look at one of these tables to get an idea of how they function. Each table includes several components.


The screenshot shows a data table with the following components highlighted by red circles with numbers:

- 1**: "Choose Columns..." dropdown menu.
- 2**: "Display 10 records per page" dropdown.
- 3**: "Quick Filter:" input field.
- 4**: Column header "Organization".
- 5**: Column header "First".
- 6**: Filter icon for the "Organization" column.
- 7**: "Showing 1 to 10 of 1,335 records" text.
- 8**: Pagination controls (1 2 3 4 5).

5	First	Last	Reg. Agency	4	Organization	Account Code	Email
	Todd	Abernathy	Missouri		Missouri Division of Professional Registration	INVE	todd.abernathy@pmr.mo.gov
	Lore	Able					lore@chardante.com
	Nathaniel	Abrahamson	Washington		Department of Licensing	INVE	RealEstate@dol.wa.gov
	Abc	Abramson	Montana		Montana Board of Realty Regulation	COMM	montanaabc@hotmail.com
	Eyes	Adair	Alabama		Alabama Real Estate Commission	EDU	eyes_adair@arc.alabama.gov
	Toni	Adams	Alabama		Alabama Real Estate Commission		tadams@arc.state.al.us
	Theodore	Adams					theadams@smulle.com
	Nathan	Aipa					nathan@aipal.com
	Joseph	Aida	California		State of California	STAFF	joseph_aida@arc.ca.gov
	Curtis	Aldendifer	North Carolina		Real Estate Commission	LEC	


1. The **Column-Chooser** allows you to choose which columns of information appear in the table. Clicking the down arrow will display a list of available columns from which you can choose the ones you would like to view. Placing a check next to the column name makes that column appear in the table. Removing a check removes the column.
2. The **Rows-to-Display-Chooser**, a drop-down menu located directly above the table headers, allows you to change the number of records that will appear in the table. You can use the drop-down menu to choose the number of records you wish to display per page. To browse from one page to another, you will use the **Page Controls** located below the table on the far right-hand side.
3. Located above the table at the far right side is the **Quick Filter**, which is an advanced search tool. This tool allows you to limit the records that display in the table. As you begin typing in the box, any data in any column that matches what you are typing will be displayed. So, for example, you are in the **Directory** table and need to edit the contact information for *Angie Smith*, an assistant sponsor. As you begin typing *Angie* into the box, the table will filter down to all records that contain *Angie*.
4. The header of the table contains up and down arrows for all columns that allow you to change the **Sort Order** of the column. At this time we only support sorting on one column at a time. A single white arrow in a field tells you how the data is currently being sorted.
5. The first column on the left-hand side of the table is your **Action Column**. This column will contain different icons that let you work with the data. If you don't know what action an icon will perform, simply hover your mouse over the icon, and a tool-tip will appear.

Common Actions

 - Edit the details of the record. Depending on the record, this may just be a quick edit that gives you access to a limited number of data points you can edit.


 - Deletes the record

 - View a record

 - Disable an account

Specialized Actions

 - Used in conjunction with the "Quick Edit" icon above, this one gives you access to all the data points for editing.

 - Send an e-mail.

6. The footer of the table contains a **Filter** for each column. While the **Quick Filter** above filters for data in *any* column, this filters data only for this *specific* column.¹
7. Under the table on the left-hand side you will see a record count and a message that tells you how many records you are viewing.
8. The right-hand side under the table contains your page navigation that lets you traverse through the records.

 - Jumps to the First Page of data

¹ Filtering can use a variety of very powerful operators to specify which data you want to view. These operators and how to use them are outlined in **Appendix A**.

- ◀ - Goes back one page of data
- # - shows what page number you are currently viewing
- ▶ - Goes forward page of data
- ⏪ - Jumps to the Last Page of data

My Profile

One of the first things you will want to do after logging in is to check your Profile for accuracy. While every effort has been made to ensure the integrity of the data transferred into this new system, errors do occur. The Account Profile page is composed of seven tabs: the **General** tab, the **Contact** tab, the **Social Networking** tab, the **Education & Work** tab, the **Bio & Expertise** tab, the **Preferences** tab and the **Participation** tab.

YOUR PROFILE

General
Contact
Social Networking & IM
Education & Work
Bio & Expertise
Preferences
Participation

ID: 3333

Member Type: Full (Alabama Real Estate Commission)
US/Canada: 20,001-30,000 Licensees

Membership Expires: 6/30/2012

Formal Title:

Prefix:

***First Name:**

Middle Name:

***Last Name:**

Suffix:

Nickname:

User Account Login

***Email:**

Change password...



Photo: Will be constrained to 300x300 pixels.

General Tab

The **General** tab is where you enter in your name information, your email address and password, and upload a picture of yourself.

- *Formal Title* – The official title you use in conjunction with the agency. Some examples are:
 - Commissioner*
 - President*
 - Board Member*
 - Executive Director*

- *Senior Investigator*
- *Director of Education*
- *Prefix* - Prefixes are honors, titles, or degrees that precede the name and should not be included in the name field. Prefixes include Mr., Mrs., Ms., Miss and Dr. Titles or degrees of individuals, including foreign titles or degrees, and their abbreviations (Mr., Mrs., Miss, Ms., Prof., Ph.D., Capt., Lt., D.D.S., Dr., Rev., etc.) may be included as an alias when it is known or believed the title or degree may be used by an individual when identifying themselves.
- *First Name* - Your given name or name that occurs first in your given name.
- *Middle Name* - The name that occurs between a person's first name and surname.
- *Last Name* - A name shared in common to identify the members of a family, as distinguished from each member's given name. May also be called a *surname* or *family name*.
- *Suffix* – This is used to indicate that the individual holds a position, educational degree, accreditation, office, or honor.
- *Nickname* - A descriptive name that replaces the actual name of a person.
- *Email* – Your email address. An email address is required as ARELLO® relies heavily on email to communicate with its membership. Also, your email address is used as part of your login.
- *Change Password* – You can use this link to change your password. Passwords are stored as encrypted fields and cannot be seen by anyone.

Contact Tab

The **Contact** tab allows you to add and edit addresses and phone numbers associated with your account. These may or may not be your own address and phone number.

To add an address or phone number, click the green button with a plus sign (+) located in the footer of the display table. A new window will be overlaid for you to enter the appropriate information. An asterisk (*) indicates the field is required.

An account may have multiple addresses or phone numbers associated with it, but only one of those addresses can be the Primary address or the Primary phone number.

Social Networking & IM Tab

This tab can be used to add links to social networks (e.g., Facebook, Linked In, Twitter, etc...) you may belong to. This will allow you to use to these sites to connect to your colleagues outside of ARELLO® channels. This information is completely voluntary.

Education and Work Tab

The **Education & Work** tab contains three kinds of information. You can enter in your education history indicating schools you have attended and degrees you have earned. You can also enter information about your employment history. ARELLO® recommends at the minimum that you enter in your current employment information. Finally, there is a place to enter in *credentials*, *professional development*, and any *professional certifications* that you may have earned.

Bio and Expertise

The **Bio & Expertise** tab is an area that allows you to provide information to the Global Headquarters and other members to allow them get to know you better. There are several areas on this tab.

- *Bio* – Describe yourself and your professional experience.
- *Areas of Expertise* – If you consider yourself an expert on a particular regulatory topic or issue, you can use this area to indicate what those topics are. This will allow other members and the Global Headquarters to rely on you when questions or issues arise in those areas.
- *Languages* – As an international organization there are times when the ARELLO® administrators need to be able to assess which languages that its members speak. You can use this area to let the Global Headquarters know which languages you speak and what you feel your fluency level is. The *lock icon* signifies that this information is accessible only by you and ARELLO® staff.
- *Regions of Expertise* - If you have a special connection with or interest in other countries/regions around the world then you can indicate those connections here. This is important so that the ARELLO® administrators know who can be of assistance in any licensing/regulatory projects that might come up in those regions. The *lock icon* signifies that this information is accessible only by you and ARELLO® staff.

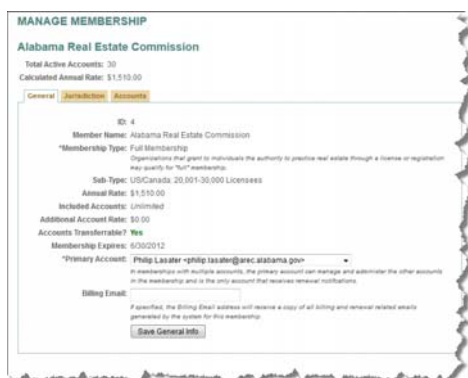
Preferences Tab

There are three main areas on the **Preferences** tab that allow you to customize your interaction with ARELLO®. First, is the *Privacy* area where you can choose whether or not your information is shown in the online Member Directory or printed in the annual Member Directory. Secondly, there is a *Communications* area for you to decide which communications you should receive. Finally, you can place a checkmark in the “My profile is complete” to hide the progress indicator when you have reviewed and updated all the profile information.

Participation Tab

The **Participation** Tab is a read-only tab. It contains information about your level of activity when it comes to participating in ARELLO® workgroups and events. You can see a history of the workgroups you have served on as well view events that you have attended in the past. This is useful for when you need to know information such as if you have attended Commissioner College 101 or 102 and decide which one you might need to attend in the future.

Manage Membership (Full and Associate members)



The screenshot shows a web form titled "MANAGE MEMBERSHIP" for the Alabama Real Estate Commission. It displays summary statistics: "Total Active Accounts: 30" and "Calculated Annual Rate: \$1,510.00". Below this are tabs for "General", "Jurisdiction", and "Accounts". The "General" tab is active, showing fields for "ID: 4", "Member Name: Alabama Real Estate Commission", "Membership Type: Full Membership", "Sub-Type: US/Canada 20,001-30,000 Licensees", "Annual Rate: \$1,510.00", "Included Accounts: Unlimited", "Additional Account Rate: \$0.00", "Accounts Transferable? Yes", and "Membership Expires: 6/30/2012". A dropdown menu for "Primary Account" is set to "Philip LaSater • philip.lasater@arec.alabama.gov". A "Billing Email" field is present with a note: "If specified, the Billing Email address will receive a copy of all billing and renewal related emails generated by the system for this membership." A "Save General Info" button is at the bottom.

Agency Administrators have additional authority to work with the information regarding the Regulatory Agency. There are three tabs that in this area, **General, Jurisdiction, and Accounts.**

General Tab

The **General Tab** displays the information regarding your membership.

- *Member Name* – displays the name of your membership, generally this is the name of the agency. This field is only editable by ARELLO® Staff. If you need this changed, contact the Global Headquarters.
- *Membership Type* – displays the type of membership assigned to your agency. Membership types and their definitions are listed in the ARELLO® Bylaws. This field is only editable by ARELLO® Staff. If you need this changed, contact the Global Headquarters.
- *Sub-Type* – This is used to determine which fee rate is used for membership fees. This field is only editable by ARELLO® Staff. If you need this changed, contact the Global Headquarters.
- *Annual Rate* – shows the annual fee you are currently being charged based on the fee rate set by the Board Directors and your Membership Type and Sub-Type combination. Changes to the Membership Type and sub-type will result in this field being updated as appropriate.
- *Included Accounts* – One of the benefits of your membership is member accounts for your commissioners and staff. Full and associate memberships come with unlimited accounts, so you can allow your entire agency access to the benefits and resources of ARELLO®.
- *Membership Expires* – The next date that your membership expires.
- *Primary Account* – Each membership must have a primary account holder. This is the person who can manage and administer the additional accounts and who receives renewal notifications. By default, this is the Agency Administrator. The agency administrator can choose another staff member to be the Primary Account. He can also **delegate** account administration to another individual while maintaining his role as the Primary Account holder. Delegation of account administration will be explained under the **Accounts** tab heading.
- *Billing Email* - This field is used to send an additional copy of renewal related emails to a different person other than the primary account holder.

Jurisdiction Tab

Full and associate members have access to this tab that allows them to edit the information for the Jurisdiction that is associated with this membership. Changes you make here are saved to the associated Jurisdiction record. This information will also be displayed on the **Regulatory Information** pages on ARELLO.COM and ARELLO.org. This information is also used to print the annual *International Directory of Real Estate Regulators and Organizations*.

- *Jurisdiction* – The name of the area over which your agency has legal authority. This field is only editable by ARELLO® Staff. If you need this changed, contact the Global Headquarters.
- *Country* – The nation in which the jurisdiction is located. This field is only editable by ARELLO® Staff. If you need this changed, contact the Global Headquarters.
- *District* – The ARELLO® District the agency has been assigned to. This field is only editable by ARELLO® Staff. If you need this changed, contact the Global Headquarters.
- *Organization Name* – This is the official name of the agency.
- *Division Name* – In jurisdictions where the real estate commission or board is a member of an umbrella regulatory agency, then this field would be used to designate the specific division that oversees real estate license law. This field can be left blank for those organizations that are not in umbrella agencies.







- *Address* - The addresses associated with your regulatory agency.
- *Phone Numbers* – The phone numbers associated with your regulatory agency. An agency may have multiple addresses or phone numbers associated with it, but only one of those can be the Primary address or the Primary phone number.
- *Website URL* – The agency’s website
- *Facebook Profile URL* – If your agency maintains a Facebook Page, you may enter the link to the profile.
- *Twitter Profile URL*- If your agency maintains a Twitter feed, you may enter the link the profile.
- *Law Website* – A link to the Real Estate laws for your particular agency.
- *Law Website Notes/Directions* – In some cases it is helpful to provide additional notes or directions to consumers who may be navigating the law portion of the website. Enter those directions here.
- *Rules Website URL* – A link to the Real Estate rules for your particular agency.
- *Rules Website Notes/Directions* – In some instances it is beneficial to the consumer to provide additional notes about the rules website. You can post those here.
- *News Website URL* – Many agencies post their historical newsletters on their website. You can provide a direct link to those by entering the URL in this field.

Accounts Tab

This is the tab that you (or the person you have delegated) can use to manage member accounts associated with your agency’s membership. By default you will see a data table listing the active accounts associated with your membership. If you wish to see historical accounts, place a check mark in the “Show Disabled Accounts” box.

Actions

There are several actions you can take on a Member Account.

-  - **Edit Account** – Allows you, as the Agency Administrator, to make changes to an account’s profile.
-  - **Reset Password** – Allows you to reset a password for an account. The system will generate a random password for the account and send it via email to the account holder.
-  - **Promote to Membership Admin** – Allows you to delegate membership management tasks to another user. This is useful for Agency Administrators who wish to entrust a deputy director or administrative assistant to the administrative tasks of managing the **Jurisdiction tab** and the **Accounts tab**.
-  - **Remove Membership Admin** – Allows you to remove the role of Membership admin from an account that has previously had it assigned.
-  - **Disable an account** – When a user leaves the organization, you should disable the account so that they no longer receive ARELLO® benefits. Disabling an account leaves the historical record of actions taken by this person intact.
-  - **Deletes an account** – This is used to remove a user who had no historical record with the agency.

Add an Account

When you have a new employee of your agency or you have a new commissioner, you can use the **Add Account** (👤) button to create a new account for the individual. When you create the account by filling out the *Create Account* form online, the system will automatically generate a password and email the new user. The welcome email they receive lists the benefits and resources they have access to as well.

Issue Notification Process

We have made every effort to ensure this system will run smoothly and efficiently. If you run into an issue, please let us know so we can help to resolve it quickly. When you run into an issue, please try to record any error messages that were displayed and document what task you were trying to complete. Then contact the **Education and Technology Division** for technical support at 334-260-2928 or by e-mail, support@arello.org.

ARELLO® Global Headquarters
312-893-5880
info@arello.org
www.arello.org

Appendix A: Filter Operators

Using operators to filter the data in the data tables can allow you to quickly pinpoint specific members.

Syntax	Means
expression	like '%expression%'
=expression	exactly equals 'expression'
!=expression	does not equal 'expression'
>expression	greater than 'expression'
>=expression	greater than or equal to 'expression'
<=expression	less than or equal to 'expression'
<expression	less than 'expression'
in(exp1,exp2)	in the list 'exp1,exp2'
!in(exp1,exp2)	not in the list 'exp1,exp2'
=NULL	is NULL or blank
!=NULL	is not NULL or blank
num1-num2	between num1 and num2, inclusive
date1-date2	between date1 and date2, inclusive

Notes:

- No qualifiers (no single quotes) should be used.
- Valid date delimiters are '/' and '.' (no '-' because that's the range operator).
- Whitespace is generally ignored within operators: '! in (1,2,3)' works as well as '! in(1,2,3)' and '!in (1, 2, 3)'.
- Whitespace is maintained within string expressions though, so that 'Region V' is different than 'RegionV'.
- Operators should not be used for Boolean data types. Entering 1, Y, or T (case-insensitive) evaluates to true, and 0, N, F evaluate to false.