# User Guide: Navigating National Specialist ARM Workspace

Purpose: This user guide describes how to navigate the National Specialists (NS) ARM workspace. The following areas (with the corresponding number on the image) are covered in this user guide:

1. User Profile Icon
2. Workspace Icon
3. Workspace Tabs
4. Workspace Panes
5. Left-hand Navigation Icons
6. Search Events Field
7. Auto-Refresh Icon
8. Assign a Diagnostic Request (DR) or Commodity Determination (CD) to the appropriate colleague.
9. Acknowledge Specimen Receipt
10. Undo a Diagnostic Request
11. Request a Physical Specimen from the Area Identifier.
12. Redirect a Diagnostic Request to the appropriate staff member.


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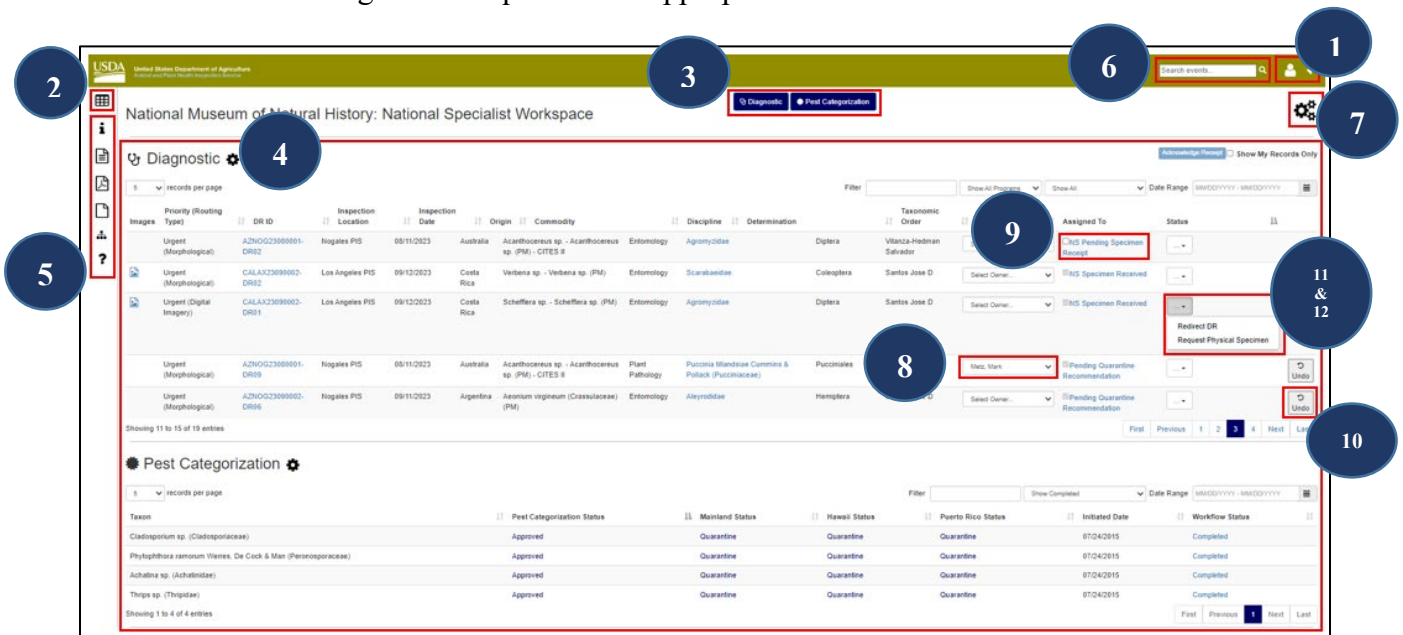
1. User Profile Icon

Each Agricultural Risk Management System (ARM) user has a workspace, that is, a customized home page based on a user's role and duty station location.

The User Profile icon has a drop-down arrow to adjust setting with a user's ARM profile.
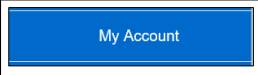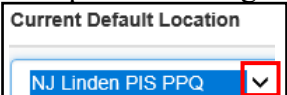
Click the arrow to display the drop-down menu. Six rows (shown below) display in the drop-down menu. Each row is described below.
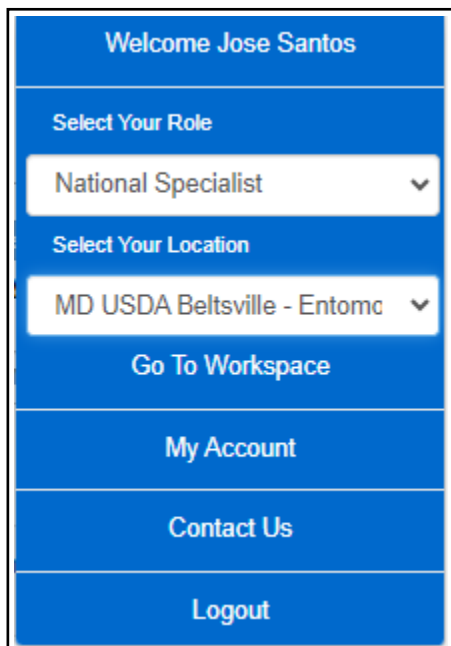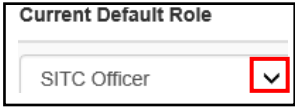
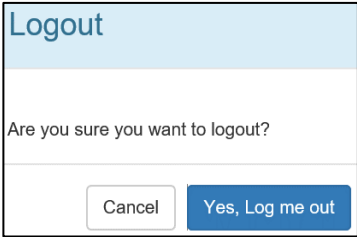| Row	Description
Welcome Jose Santos	This row lists the name of the person who signed in with the LincPass log in.
Select Your Role — National Specialist	This row lists the Role(s) for which users have permission(s). Users who are assigned multiple roles can click the drop-down arrow and select another location.
Select Your Location — MD USDA Beltsville - Entomo	This row lists the location(s) for which users have permission(s). Users who are assigned multiple locations can click the drop-down arrow and select another location.

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Go To Workspace	Once the user selects the role and location, this row will take the user to the Workspace selected.
My Account	This row allows users to update and set their user information, default role and location if they have multiple options. Refer to Navigate and set your account table below for detailed information.
Contact Us	When users click the link, an email opens and populates the To: line with the ARM Help Desk email address (ARM-Helpdesk@usda.gov). • If the email requires immediate attention, users should type Urgent in the subject line. • If the email is related to ARM Plant Inspection Station (PIS), users should type that in the subject line. This distinguishes it from ARM Predeparture. After users send the email, the Help Desk receives the email, reviews the email, and manually assigns the ticket.
Logout	This row allows user to log out of ARM.

To navigate and set your account information, follow the steps below.

Step	Action
1	Click My Account. My Account User details, current user roles and locations page opens. **User Details** | First Name	Middle Name	Last Name	Phone Number	Badge Number	Email Address
Antonio		Velazquez	787-710-7983		Antonio.Velazquez@usda.g	 Update information if needed. First, Middle or Last Name, Phone or Badge Number and Email address. **Note:** All information defaulted on this fields are related to Linc pass user sign on.
2	To update or change location, click on Current Default Location dropdown arrow. **Current Default Location** NJ Linden PIS PPQ ⌄

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3	To update or change role, click on Current Default Role dropdown arrow. **Current Default Role** SITC Officer
4	Save user details, roles and/or location updates. **Note:** All updates or changes will not happen at the moment. They will show next time user logs into ARM.

To exit the system, users must do so using the log out tab. To log out from ARM, follow the steps below.

Step	Action
1	Click Logout. Logout A window displays asking users if they want to log out. Logout Are you sure you want to logout? Cancel Yes, Log me out
2	Click Cancel to stay in ARM; or click "Yes, Log me out" to exit ARM.

2. Workspace Icon

The Workspace icon is the home button for ARM. When navigating ARM, return to the ARM workspace by clicking the Workspace icon.
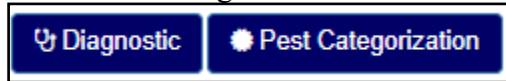
IMPORTANT:
- Do NOT use the back arrows in the browser to navigate ARM.
- Always SAVE the information before clicking the Workspace icon to avoid losing any changes.

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3. Workspace Tabs

The workspace tabs are toggle buttons. Users can click the following tabs to hide or show panes in the workspace.
•	Diagnostic
•	Pest Categorization

By default, the tabs are blue. Blue indicates that the panes are visible in the workspace. Clicking a tab changes, it from blue to white. White indicates the pane is hidden. In the image above, the Inspections pane would be hidden in the workspace; the other panes would be displayed.

Note: At least one pane must be displayed in the workspace. Thus, at least one tab must be blue.

The following warning message will show when users try to hide all tabs:

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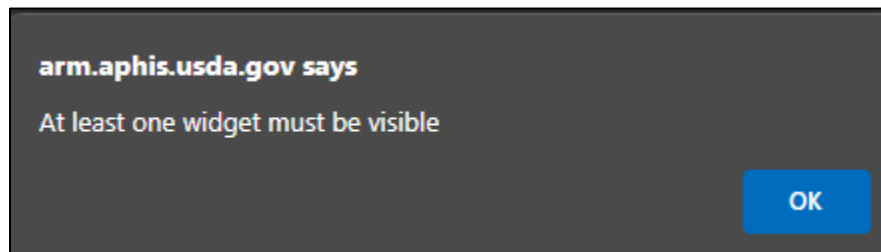
4. Workspace Panes

The names of the panes match the names of the tabs. Each pane shares the following fields (with the corresponding number on the image below).

1. Records per Page
2. Filtering Options
   - By Unique (or Partial) Identifier
   - By Programs (Diagnostic Only)
   - By your Records Only (Diagnostic Only)
   - By Status
   - By Date Range
3. Total Number of Records (in Selected Status)
4. First, Previous, Next, and Last Buttons
5. Sorting Icons
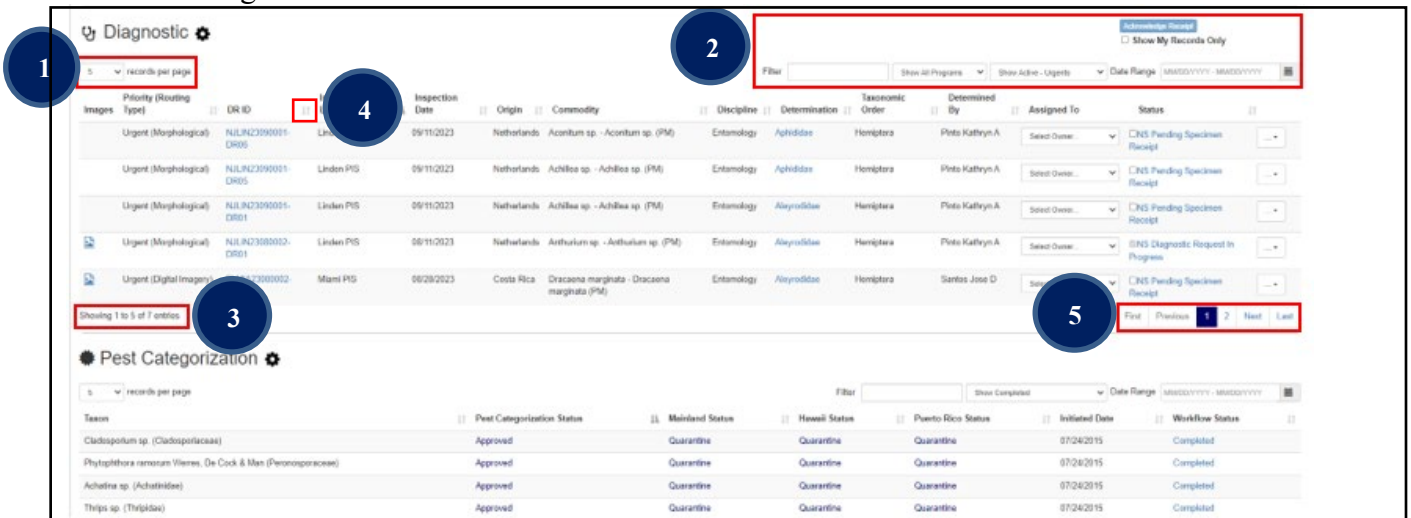
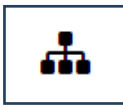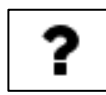The panes and their description are listed in alphabetical order in the table below:

Pane	Tab	Description
Diagnostic	Diagnostic	This pane displays all pests or Diagnostic Requests (DR) sent to or reviewed by PPQ or CBP.
Pest Categorization	Pest Categorization	This pane displays all taxon that needs categorization and the ones that already categorized. **Note:** For more information on this panel, please refer to NIS.

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5. Left-hand Navigation Icons

One of the ways users can navigate ARM is to use the icons on the left-hand side of the Workspace. (The area containing the icons is also known as the "left-hand drawer" because of the way items open when clicked.)

| Icon	Name	Description
i	**Info**	This icon displays on the workspace but is active only when users are in a record. (If users are not in a record, red, null sign (⊘) will display when they hover over the icon.) Clicking this icon while in a record opens the Info panel which displays the complete history of a record in reverse chronological order. (For more information, refer to the **User Guide: Info Panel**.)
	Uploaded Documents	This icon displays on the workspace but is active only when users are in a record. (If users are not in a record, red, null sign (⊘) will display when they hover over the icon.) Clicking this icon shows the documents (such as package images.) that were uploaded for the record or notes that no documents were uploaded.
	ARM Generated Forms	This icon displays on the workspace but is active only when users are in a record. (If users are not in a record, red, null sign (⊘) will display when they hover over the icon.) Clicking this icon shows the forms that have been created by ARM, such as Diagnostic Requests and Predeparture Regulatory Action Forms. (See example below.) Clicking the link opens the document as a PDF

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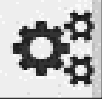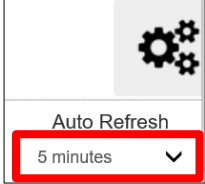|		
		in a new tab. | Event Id	Commodity(ies)	Origins	User Role
---	---	---	---
GAATL18030001-DR01	Amaranthus sp. - Amaranthus sp. (PM)	Azerbaijan	Touhey, Peter
GAATL18030001-DR02	Amaranthus sp. - Amaranthus sp. (PM)	Azerbaijan	Touhey, Peter
GAATL18030001-DR03	Amaranthus sp. - Amaranthus sp. (PM)	Azerbaijan	Touhey, Peter	
	Reports	The Reports icon launches the Cognos reporting website, where reports can be run using the data that has been entered into ARM. This will be used mostly by supervisors.
	Taxonomy	ARM has a core Taxonomy table that is referenced by both Pests and Plant Commodities. You can search the Taxonomy table by clicking on the Taxonomy icon. Clicking this icon will launches the Taxonomy search page, where users can search for names in the table. The Taxonomy icon is accessible from any page.
	HELP	The Help icon is accessible from any page. Clicking this icon displays: Help Desk Contact Information, User Guides, Functionality, Other links, etc.

6. Search Events Field

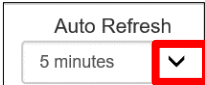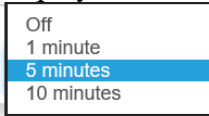The Search Events field allows users to find a record in ARM. For more information, refer to the **User Guide: How to Search for a record using ARM's Global Search.**

7. Auto Refresh Icon
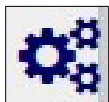
To avoid timing out, users can set the auto refresh option using the Auto Refresh icon.

For security reasons eAuthentication times out and automatically logs out of ARM when users have not been active in ARM for certain periods of time.

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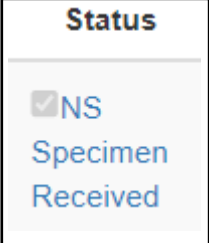| Step	Action
1	Click Auto Refresh icon. A window displays. The field displayed in the drop-down menu indicates how frequently ARM is automatically refreshing. The default option is Off.
2	If desired, change how frequently ARM is refreshing by clicking the drop-down arrow. **NOTE: The recommended setting is five minutes.** A window displays the expanded drop-down menu. The current auto refresh option is highlighted. The other options to change how frequently ARM refreshes the page display.

8. Assign a Diagnostic Request or a Commodity Determination

The users can assign DR or a CD from the workspace. To begin assigning a DR or a CD process, refer to steps on table below:

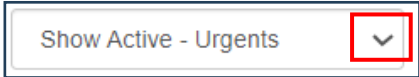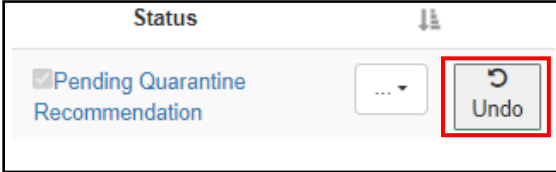| 1	Select an option from the Assigned to dropdown list. If needed.
	Assigned To Select Owner... ⌄ **Note:** The names showing in this field are those associated to the user location. Select a name from the dropdown list. Select Owner... ⌄ Select Owner... Buffington, Matthew Chamorro, Lourdes Gates, Michael Goldstein, Paul Henry, Thomas Kim, Jung W Konstantinov, Alexander Kula, Robert McKamey, Stuart Metz, Mark Nearns, Eugenio H Norrbom, Allen Ouellette, Gary D Sokolov, Igor Solis, M. A Young, Jim D Zahniser, James N **This step can be skipped if this field will not be used.**

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9. Acknowledge Specimen Receipt
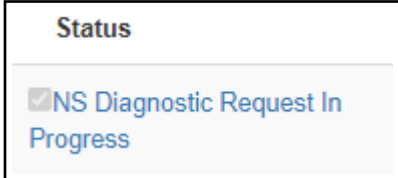
When you need to acknowledge receipt a DR or a CD, you can do that directly from the Workspace. To begin the acknowledge a DR or a CD process, refer to steps on table below:

Step	Action
1	Locate the DR or CD, click on the check box next to the Status of the DR. **Status** ☑ NS Pending Specimen Receipt
2	Click on Acknowledge Receipt button. **Acknowledge Receipt** **Note:** Once you click, the status will change to NS Specimen Received. Also, is not required to be done on the Workspace. **Status** ☑ NS Specimen Received

Note: For more information refer to **User Guide: Acknowledging Receipt, a Diagnostic Request, or a Commodity Determination in the National Specialist ARM Workspace**.

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10. Undo a Diagnostic Request or a Commodity Determination

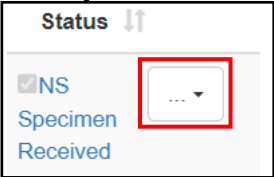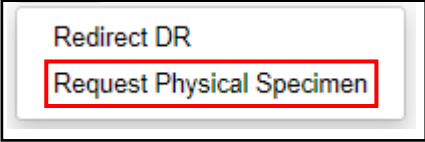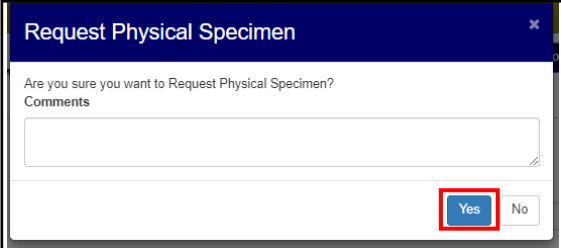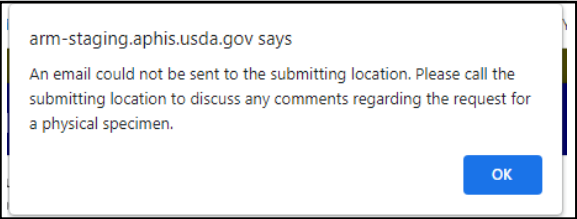National Specialists can Undo a Diagnostic Request or a Commodity Determination but **only** for those DRs that still Pending Quarantine Recommendation. To begin Undo a DR or a CD process, refer to steps on table below:

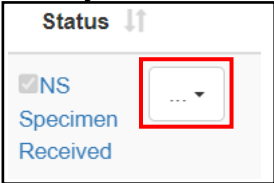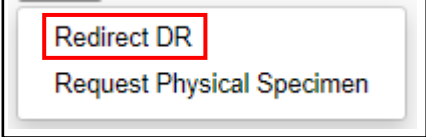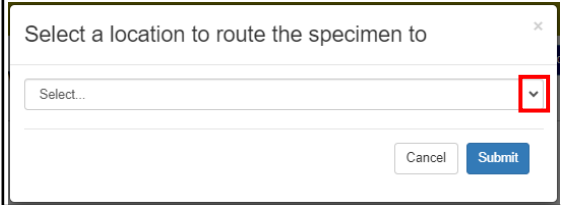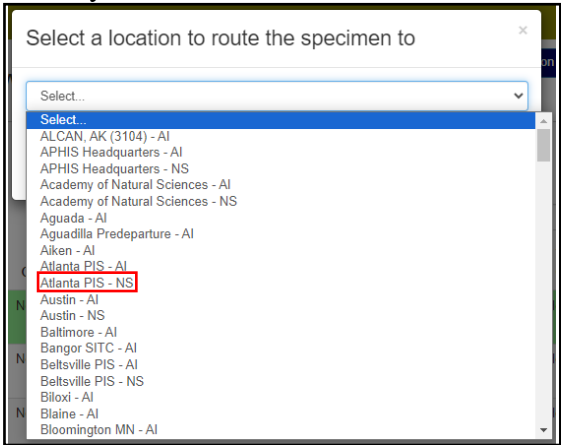| Step	Action
1	In the NS Main Workspace, click on the dropdown arrow in the Diagnostic's pane view. This field is defaulted to Active - Urgents. Show Active - Urgents ⌄ Select one option from the Show Complete options accordingly. Show Active - Urgents Show Active Digital Imagery Show Active Molecular Show Active Morphological Show All Active Show Complete: 1 Day Show Complete: 3 Days Show Complete: 7 Days Show Complete: 30 Days Show All
2	Once you locate the DR or CD, click on the Undo button under the Status column. Status ☑ Pending Quarantine Recommendation ... ▾ ↺ Undo **Note:** After this, the DR or CD will be redirected back to the All Active view in the Main Workspace. Go to Step 3. **Note: If the Undo icon is not available, please contact the ARM Help Desk for assistance.**
3	Locate the DR or CD, click on the Status hyperlink to access the Determination Page. Status ☑ NS Diagnostic Request In Progress The status will show as NS Diagnostic Request in Progress.
4	Edit the information as needed. Resubmit the determination following the steps from **User Guide: Entering Data for Determination Information Page in National Specialist ARM Workspace**.

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11. Request Physical Specimen

For DRs or CDs that were sent using the Digital Imagery method [Urgent (Digital Imagery)] , NS can request a physical specimen from the Workspace. To begin the Request Physical Specimen process, refer to steps on table below:

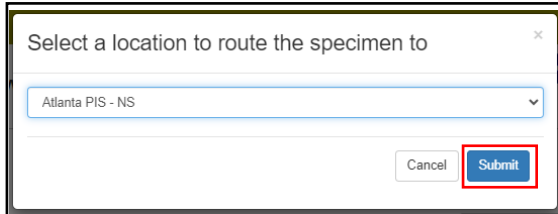| Step	Action
1	Once you locate the DR or CD, click on the ellipsis box in the Status column. Status ⇅ ☑NS Specimen Received [... ▼]
2	Click on Request Physical Specimen. Redirect DR Request Physical Specimen
3	Add any comments if needed and then click Yes. Request Physical Specimen ✕ Are you sure you want to Request Physical Specimen? Comments [ ] Yes No **Note:** ARM will send an email to the location to let them know about the physical specimen request. For some locations that an email could not be sent, they will get this message. Click Ok. arm-staging.aphis.usda.gov says An email could not be sent to the submitting location. Please call the submitting location to discuss any comments regarding the request for a physical specimen. OK The DR or CD will go back to the Area Identifier Workspace with the Physical Specimen Requested status. ☑Physical Specimen Requested

12. Redirect a DR or CD

When you need to redirect a DR or a CD to the appropriate staff member, you can do that directly from the Workspace. To begin redirecting a DR process, refer to steps on table below:

Step	Action
1	Once you locate the DR or CD, click on the ellipsis box in the Status column.
2	Click on Redirect DR.
3	Click on the drop-down arrow in the Select a location to route the specimen to. Make your selection the location.

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4	Click on Submit.
	Select a location to route the specimen to × Atlanta PIS - NS ⌄ Cancel **Submit**
	The DR or CD will be sent to the colleague at that location.

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