



# CMSP Client Portal Instructions for Internal Customers

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# The CMSP Client Portal is a web-based interface for CMSP Customers

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## Getting Started

If you are a NEW customer or an EXISTING customer who cannot log onto the Portal yet, please request access from

- Candace Guerrero ([cguerrer@umn.edu](mailto:cguerrer@umn.edu)) or
  - LeeAnn Higgins ([higgi022@umn.edu](mailto:higgi022@umn.edu))
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## Overview

This Help document is intended for University of Minnesota **Internal** research clients.

### In the Portal you can:

- Enter and edit contact and budget information
- Submit samples for analysis at CMSP
- Share project-related documents with CMSP
- Reserve instrument operation time for:
  1. QTRAP 5500
  2. Sciex 6500+
  3. Agilent 6495C
  4. Bruker MALDI-TOF Autoflex
- Check billing and analyses details for completed samples

### In the Portal you CANNOT:

- Use the back button in the browser! (Please use the buttons at the bottom of the page to navigate within the pages of the Portal.)



## LOG INTO THE PORTAL:

1. Sign into [VPN](#) (if you are off-campus)
2. Go to the [CMSP Sample Submission](#) page
3. Click on the link for [CMSP Client Portal](#)
  - a. Enter your **Account Name**  
(**NOTE!** Type your UM X500 / Internet ID, not your full email address!)
  - b. Type in your **UM password**

If you cannot log on, please request access to the portal (see the Getting Started section on the previous page)

When you log into the Portal, you will see the **Accounts** page of the **CMSP Lab Management** portal

**CMSP Lab Management** Refresh

Signed in as **higgi022**

First Name:

Last Name:

Email:

Main Phone:

[Update My Profile](#)

[NMR Log](#)

[Instrument Calendar \(view only\)](#)

My Pending Accounts...

			<a href="#">+ Account</a>

My Approved Billing Accounts...

			<a href="#">View/Edit</a>
0899	EFS: 1000-10865-720403-20090-----2103466	MSP MSP	<a href="#">View/Edit</a>

Accounts   Experiments   Completed   Filter by Project



## Enter your Account (budget) Number

If you are an existing CMSP customer, your budget numbers may already be entered in the CMSP lab management system and they will appear in the “My Approved Billing Accounts...” section of the **Accounts** page.

To enter a **NEW** budget number, Click on the ‘+ Account’ button  on the **Accounts** page and fill out the form:

- Enter the EFS budget number in the appropriate fields
- **PI Name:** Click on the arrow next to the ‘PI Name’ field. In the pop-up window, type the PI first or last name in the search field then click ‘Filter’ or press the Enter and Select their name from the list. If the PI you are searching for is not on the list, or if selecting them does not fill their name in the account, they are either not in the system or may not be marked as a PI in our system. If the PI is not in the list, click Cancel and then click + (next to PI field) to open the ‘Primary Investigator Entry’ pop-up window, and fill in the fields.
- **Accountant:** Click on the arrow next to the ‘Accountant’ field. In the pop-up window, type the accountant first or last name in the search field then click ‘Filter’ or press the Enter and Select their name from the list. If the accountant is not in the list, click Cancel and then click + (next to Accountant field) to open the ‘New Accountant Entry’ pop-up window, and fill in the fields.
- Enter a Nickname for the EFS account (this is optional).

When you have filled in the relevant information click **Submit**. Click **Delete Request** if you need to cancel the submission.



### Fill in account information and click Submit...

Highlighted fields are required

Fund (4 digits)	<input type="text" value="1234"/>	PI Name	<input type="text" value="Timothy J Griffin"/>	<input type="button" value="?"/> <input type="button" value="+"/>
Account	<input type="text" value="720403"/>	PI x500	<input type="text" value="tgriffin"/>	
PCBU	<input type="text" value="UMSPR"/>			
Dept Id (5 digits)	<input type="text" value="12345"/>	Accountant	<input type="text" value="Banana Split"/>	<input type="button" value="?"/> <input type="button" value="+"/>
Program	<input type="text"/>	Email	<input type="text" value="splits@mmm.edu"/>	
Activity	<input type="text"/>	Phone	<input type="text" value="5-2589"/>	
Project (8 digits)	<input type="text" value="86753099"/>	Nickname	<input type="text" value="(optional)"/>	
Chartfield 1	<input type="text"/>			
Chartfield 2	<input type="text"/>			
Empl ID	<input type="text"/>			
Expires On	<input type="text" value="5/19/2022"/>			<input type="button" value="📅"/>

After you submit a new EFS number, the new budget number will appear in the **'My Pending Accounts'** list on the **Accounts** page. Click on the pencil icon next to the account name on the Pending page if you need to view or edit the account number (see below).

My Pending Accounts...	
Mass Spec Example Account	<input type="button" value="✎"/>
	<input type="button" value="+ Account"/>

After the budget number is entered into the CMSP software, it will appear in **'My Approved Billing Accounts'** list on the **Accounts** page.

## Experiment (Sample) Submission

*For new customers or new experiments from repeat customers, prior to sample submission please consult with CMSP personnel about your project to assess project feasibility, compatibility, and other pertinent details.*

**DEFINITION:** An 'Experiment' is a set of related samples.



**NOTE:** New Experiments can be initiated before an Account number has been approved (that is, when the account number is in the 'My Pending Accounts' list).

When you are ready to submit samples, click on **Experiments** at the bottom of the Portal website.



Click on the '+ New Experiment' button. You will be directed to the 'I'm requesting a new experiment...' page. Fill in the appropriate fields as outlined below.

**EFS Billing Field** Click on the dropdown arrow and select an EFS number from the Pending or Approved Accounts.

**Co-PI or Mentor Field** Enter the name or select from the drop-down list IF pertinent.

**Project Name** Click the arrow in the field. A drop-down list will populate if you or a CMSP member has previously created a Project Name in the system. If your project name is not listed, type in a name. NOTE: a Project Name is a high-level descriptor of a project, it is related to the main goal of the mass spectrometry-based experiment. A single Project may have multiple Experiments. Select 'Undefined' if you're not sure what to enter. Select a **SubProject** name if pertinent (note: Subprojects are established by CMSP members).

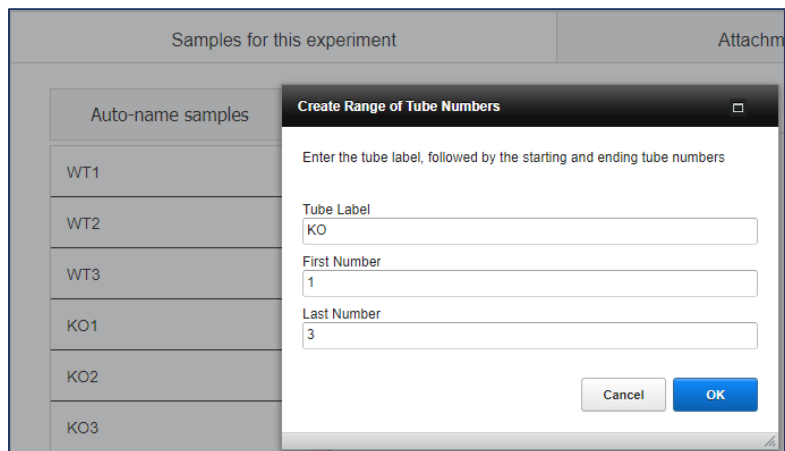
**Category field** Select the pertinent category from the drop-down list. Select from: Metabolomics Targeted, Metabolomics Discovery, Proteomics Targeted and Proteomics Discovery

**Species** Type in the species name that is related to your samples.

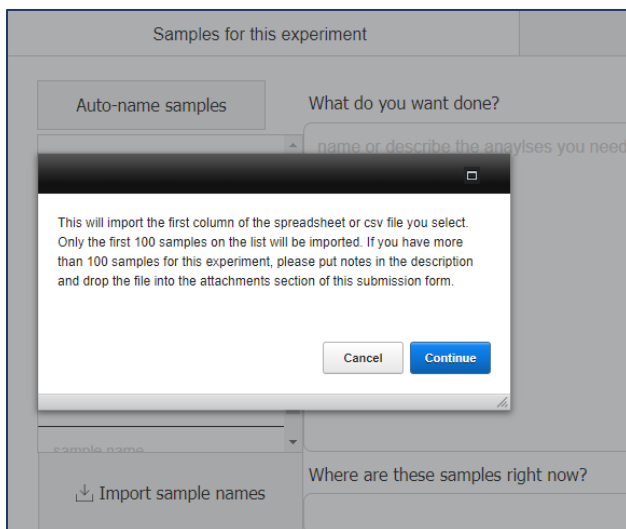
**This is Rush!** Click the box next to rush if pertinent. **Please inquire with CMSP personnel about rush rates, which are 3x the normal rate, and turnaround time estimates before you click this box.**

**Samples For This Experiment** Enter sample names using Method 1 or 2 or both (below) or type the names in manually. Be sure the sample name on the tube you submit matches the sample names in this list.

**METHOD 1:** Click on Auto name samples. Type a common prefix for the set of samples (if pertinent) and a first and last number for the set of samples. The image below shows 2 groups of sample tubes that share a common prefix that were entered by this method.



**METHOD 2:** Click on 'Import sample names,' choose [Continue](#), click on [Choose File](#), select a csv file that contains sample names in the first column, the column should not have a header label, click [Open](#), then click [Upload](#).



**Note:** you can enter sample names by Methods 1 and 2 for the same experiment.

**An completed New Experiment form is shown below as an example.**



## I'm requesting a new experiment...

Highlighted fields are required

EFS Billing	EFS: 1000-10865-720403-20090-----2103466	Samples for this experiment	Attachments	For incoming proteolytic digestion samples
PI	MSP MSP	Auto-name samples	Instrument choice for analysis	
COPI or Mentor		MS2	Eclipse	
Project Name	Proteomics MS Development	MS3	Analyses Requested and Sample-related Information	
Subproject	PTM Quant	MS4	DDA acquisition, pilot samples for qualitative analysis prior to quantification	
Category	Proteomics Discovery	MS5		
Species	yeast	MS6		
This is a Rush!	<input type="checkbox"/>	MS7		
Invoice Reference	(optional)	↓ Import sample names		

Instrument Reservations

**Attachments.** Please share pertinent files along with your Experiment such as protocols used during your sample preparation stage, SDS-PAGE gel images, project background information, related publications and more. Click on the Attachments tab. Click on 'Upload Files,' click on 'Choose File,' select a file from your local computer, click Upload, select a Category from the list in the pop-up window (or type a new category name), click Done. Click on the 'X' next to the filename if you want to remove it.

**For proteolytic digestions performed prior to sample submission.** Click on the tab 'For incoming proteolytic digestion samples.' Select the Cysteine Alkylating Reagent used during the sample preparation (if any) and type in the name of the enzyme(s) used for the proteolytic digestion.

Click on Delete request  if you need to cancel the submission!

Click on Submit  to complete the sample submission process.

After your request for '+ New Experiment' is submitted, a temporary Log Number will be shown on the **Experiments** page. See example [below](#).





## CMSP Lab Management

Refresh



Signed in as higgs022

First Name

LeeAnn

Last Name

Higgins

Email

higgs022@umn.edu

Main Phone

612-625-2279

Update My Profile

NMR Log

Instrument Calendar  
(view only)

## My Pending Experiments...

TMP1181	3/23/2022	Proteomics MS Development	

+ New Experiment

## My Approved Experiments...

18465	2/9/2022	Proteomics Discovery	In Queue	details

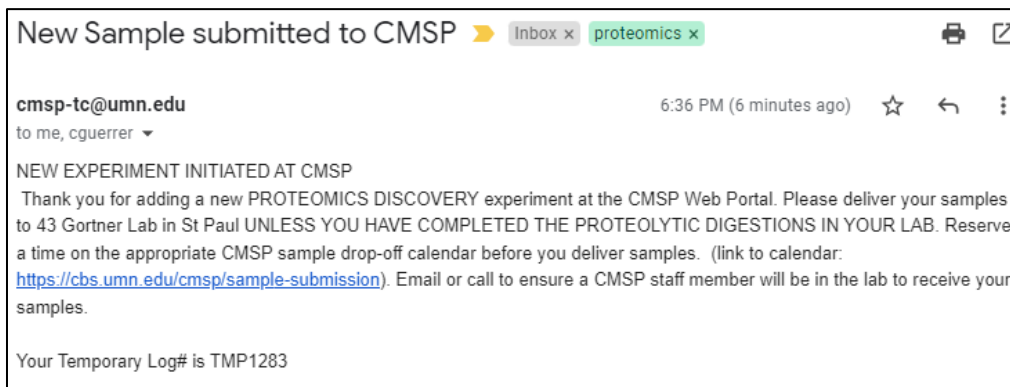
Accounts

Experiments

Completed

Filter by Project

**Experiment submission follow up:** After you initiate an experiment you will receive email notification of the submission; the temporary log number will be shown in the body of the email. See below for example.



**NEXT: Contact CMSP to arrange delivery of your samples.**

## Delivering your samples to CMSP

Reserve a time on the appropriate CMSP sample drop-off calendar before you deliver samples; ensure CMSP personnel will be in the lab (call or email).



- [MSP Sample Drop-off Reservations](#)
- [St. Paul Sample Drop-off Reservations](#)

See <https://cbs.umn.edu/cmstp/contact> for addresses and phone numbers.

Sample turnaround time is dependent on the current sample queue and other factors, including instrumentation status (e.g., maintenance schedules). Customer participation in sample preparation procedures is encouraged after proper instruction from lab staff. Contact core facility staff for inquiries on sample status.

NOTE: All samples are analyzed in the order of receipt.

## Experiment Approval

After your samples are delivered to CMSP, your Temporary Experiment number into a permanent Experiment / Log number when they are logged into the system by a CMSP staff member. You will receive an email from [cmstp-tc@umn.edu](mailto:cmstp-tc@umn.edu) with a permanent Experiment / Log number that can be used to track your sample and view the status in the Web Portal.

The permanent Log/Experiment number will be listed on the **Experiments** along with the status.

Click on 'Details' button for any Experiment to see the analyses details, pricing and the status in the queue (see [below](#) for an example).

**Experiment Details**
**In Queue**  
< >  
1/1

<p>Log Number: <b>18465</b> <i>TMP1074</i></p> <p>Researcher: LeeAnn Higgins</p> <p>Project: Eclipse Development</p> <p>Sub-project: subproject</p> <p>Category: Proteomics Discovery</p> <p>Account:</p> <p>PI: MSP MSP</p> <p>COPI:</p> <p>Sample Type: phosphoenrich</p> <p>Species: human</p> <p style="text-align: center;"> Instrument Reservations</p> <p style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-top: 10px;">Close</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">analyses</th> <th style="width: 15%;">samples</th> <th style="width: 15%;">attachments</th> <th style="width: 45%;">My Reservations</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Analysis</td> <td style="text-align: center;">Qty</td> <td style="text-align: center;">Price</td> <td style="text-align: center;">Analyst</td> </tr> <tr> <td style="text-align: center;">Instrument</td> <td style="text-align: center;">√</td> <td style="text-align: center;">no chg</td> <td></td> </tr> <tr> <td>Eclipse - Orbitrap Tribid Eclipse</td> <td style="text-align: center;">10</td> <td style="text-align: center;">\$1105.00</td> <td>LeeAnn Eclipse</td> </tr> <tr> <td></td> <td></td> <td></td> <td style="text-align: center;">N Y</td> </tr> <tr> <td colspan="3"></td> <td style="text-align: right;">Total Price \$0.00</td> </tr> <tr> <td colspan="4"> <p>data release <input type="text"/> </p> <p>Complete <input type="text"/> No <input type="text"/>  By <input type="text"/></p> </td> </tr> </tbody> </table>	analyses	samples	attachments	My Reservations	Analysis	Qty	Price	Analyst	Instrument	√	no chg		Eclipse - Orbitrap Tribid Eclipse	10	\$1105.00	LeeAnn Eclipse				N Y				Total Price \$0.00	<p>data release <input type="text"/> </p> <p>Complete <input type="text"/> No <input type="text"/>  By <input type="text"/></p>			
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Drag the cursor to select the time slot you would like to reserve, double-check the time and date fields in the Instrument Reservation pop-up window and select Submit (or select the Trash Can to cancel). The reservation request will be approved or denied by the instrument main operator and you will receive an email confirmation or denial about your request. If your request is approved and you do not show up for your reservation, there will be a No Show charge applied to your account unless you cancel the appointment at least 4 hours ahead of time. If you need to cancel your time, please contact CMSP or delete the appointment from the calendar in the Client Portal.

### \* Instrument Reservation

Reserve for...

higg022 TMP1171

Start Date Time  1 All Day

3/21/2022 1:00 PM

End Date Time

3/21/2022 3:30 PM

Description

Peptide samples for MALDI-TOF

Instrument

Bruker Autoflex

Submit

## Completed Experiments

Click on the Completed Tab at the bottom of the page to access details for experiments that have been completed and billed. An example of the information included is shown below.



Experiment Details

Complete and Billed

< 99/99 >

Log Number: 18334  
 Researcher: LeeAnn Higgins  
 Project: Eclipse Development  
 Sub-project: HeLa RunTime is Peptides  
 Category: Proteomics Discovery  
 Account:  
 PI: MSP MSP  
 COPI:  
 Sample Type: soln digest  
 Species: human

Instrument Reservations

analyses		samples		attachments		My Reservations	
Analysis	Qty	Price	Analyst	Instrument	✓	no chg	
Eclipse - Orbitrap Tribrid Eclipse	10	\$1105.00	LeeAnn	Eclipse	Y	Y	
DA_PD - Proteome Discoverer	2	\$209.06	LeeAnn	Data Analysis	Y	Y	
2 analyses		Total Price		\$0.00			

data release

Complete Yes 1/31/2022 2:16:45 PM By cguerrer Billing Method EFS

## NMR Instrument Log

NMR Log

Click on the NMR Log button on the left side of any web portal page to record your usage on the NMR instrument in Gortner Lab, 1475 Gortner Avenue, UM St Paul campus.

Click on + Log Entry and fill in the appropriate fields, then click on Done. Click the 'X' if you need to delete the entry.

## NMR Log

+ Log Entry

Date	Start Time	End Time	Bill to account	Description
2/10/2022	10:00	11:00	EFS: 1000-10865-720403-20090-----2103466	10 samples