



CMSP Client Portal Instructions

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

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) or
 - LeeAnn Higgins (higgi022@umn.edu)
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Overview

This Help document is intended for University of Minnesota (Internal) 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 higgs022

First Name: Misses
Last Name: Jones
Email: missesjones@umn.edu
Main Phone: 612-625-2279

[Update My Profile](#)

[NMR Log](#)

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

My Pending Accounts...

				+ Account

My Approved Billing Accounts...

			View/Edit
0899	EFS: 1000-10865-720403-20090-----2103466	MSP MSP	View/Edit

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
- **Select** or **Enter** the PI Name: Click on the arrow next to ‘PI Name,’ type the first or last name in the search field, 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.
- Enter your departmental accountant and contact information
- 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.

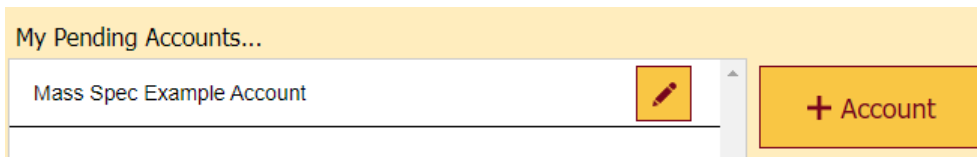
Fill in account information and click Submit...

Highlighted fields are required

Fund	<input type="text" value="5000"/>	PI Name	<input type="text" value="Timothy J Griffin"/> ▼	+	?
Account	<input type="text" value="720403"/>	PI x500	<input type="text" value="tgriffin"/>		
PCBU		Expires On	<input type="text" value="3/16/2022"/> 📅		
Dept Id	<input type="text" value="12345"/>	Accountant	<input type="text" value="Misses Jones"/> ▼		
Program	<input type="text"/>	Email	<input type="text" value="missesjones@umn.edu"/>		
Activity	<input type="text"/>	Phone	<input type="text" value="987-6543"/>		
Project	<input type="text" value="67891011"/>	Nickname	<input type="text" value="Mass Spec Example Account"/>		
Chartfield 1	<input type="text"/>				
Chartfield 2	<input type="text"/>				
Empl ID	<input type="text"/>				



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).



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

NMR Instrument 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. When you are finished click on the DONE button.

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 ⋮ ×
				⋮ ×