



CMSP Client Portal Instructions for Internal Customers

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

1. 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)
-

2. 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.)



3. 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)

4. Update your Profile

When you log into the Portal, please fill in your name, email and phone number (if these fields are blank), '[Click on Complete My Profile](#),' enter any additional information on the next page, select the designation of 'PI' or 'not PI' and then click '[Save Changes](#).'

The screenshot shows the 'CMSP Lab Management' portal interface. At the top, there is a dark red header with the text 'CMSP Lab Management' and a yellow 'Refresh' button. Below the header, the user is signed in, with a 'Signed in as' field. The main content area contains several input fields for profile information: 'First Name', 'Last Name', 'Email', and 'Main Phone'. A message reads 'Complete your profile to submit your first sample'. Below the input fields are three buttons: 'Complete My Profile' (dark red), 'NMR Log' (dark red), and 'Instrument Calendar (view only)' (yellow). At the bottom, there is a navigation bar with four buttons: 'Accounts' (dark red), 'Experiments' (yellow), 'Completed' (yellow), and 'Filter by Project' (yellow).



5. Enter your Account (budget) Number

Click on the Accounts tab at the bottom of the page. Is the account number you will use for your new samples shown in the “My Approved Billing Accounts...” section?

If **YES**, click on the **Experiments** tab and proceed to the Section 6, ‘Experiment Submission.’

If **NO**, enter a **NEW** budget number, along with your departmental accountant contact information and your PI contact information.

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	720403	PI x500	<input type="text" value="tgriffin"/>	
PCBU	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. Proceed to Experiment Submission.

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).



6. 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.

Experiment name: Please type in a name for your experiment that will allow you to identify the set of samples you are about to submit.

Project Name Select from the list or leave blank if a project name is not established yet.

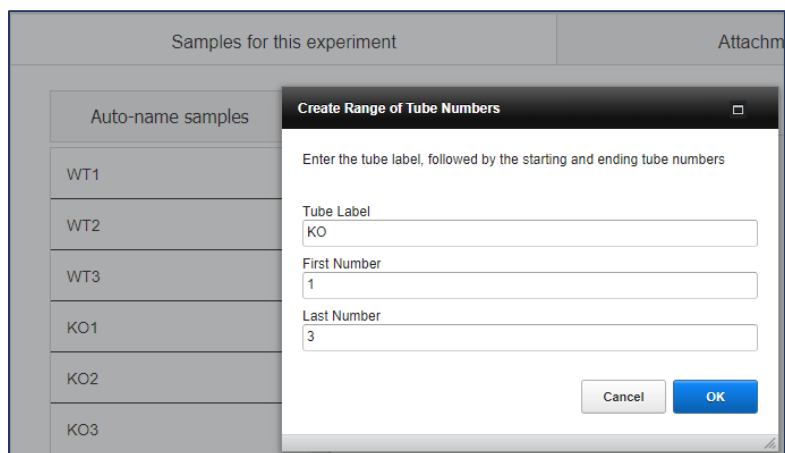
Category field Select the pertinent category from the drop-down list. Select from: Metabolomics Targeted, Metabolomics Discovery, Proteomics Targeted and Proteomics Discovery

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.



Samples for this experiment

Auto-name samples

WT1

WT2

WT3

KO1

KO2

KO3

Create Range of Tube Numbers

Enter the tube label, followed by the starting and ending tube numbers

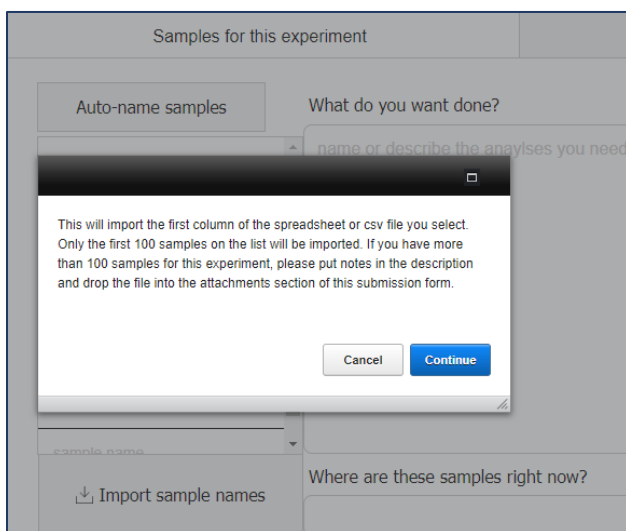
Tube Label
KO

First Number
1

Last Number
3

Cancel OK

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](#).



Samples for this experiment

Auto-name samples

What do you want done?

name or describe the analyses you need

This will import the first column of the spreadsheet or csv file you select. Only the first 100 samples on the list will be imported. If you have more than 100 samples for this experiment, please put notes in the description and drop the file into the attachments section of this submission form.

Cancel Continue

sample name

Import sample names

Where are these samples right now?

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	Edit

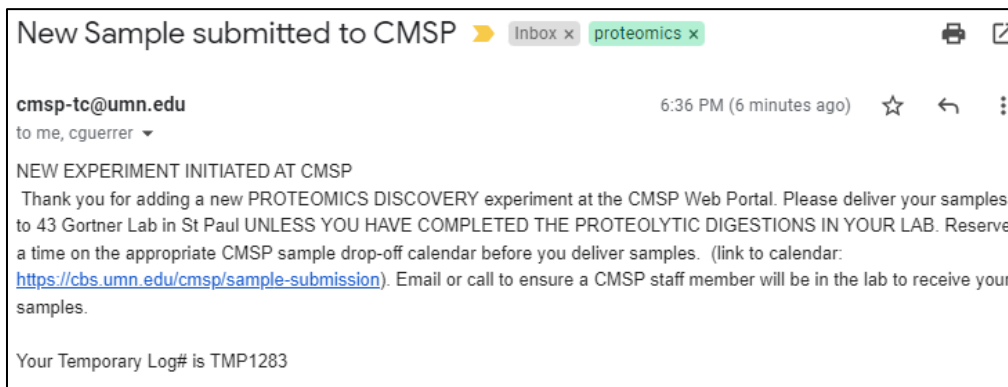
[+ New Experiment](#)

My Approved Experiments...

18465	2/9/2022	Proteomics Discovery	In Queue	Q 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.

7. 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.

8. 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 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

	analyses	samples	attachments	My Reservations
Log Number	18465 TMP1074			
Researcher	LeeAnn Higgins			
Project	Eclipse Development			
Sub-project	subproject			
Category	Proteomics Discovery			
Account				
PI	MSP MSP			
COPI				
Sample Type	phosphoenrich			
Species	human			
📅 Instrument Reservations				
Close				

Analysis	Qty	Price	Analyst	Instrument	√	no chg	
Eclipse - Orbitrap Tribid Eclipse	10	\$1105.00	LeeAnn	Eclipse	N	Y	
Total Price \$0.00							
data release				Billing Method		EFS	
Complete	No			By			



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...

higgj022 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

10. 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

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 [calendar icon] Billing Method EFS

Complete Yes 1/31/2022 2:16:45 PM [calendar icon] By cguerrer

11. 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 [calendar icon]	10:00	11:00	EFS: 1000-10865-720403-20090-----2103466	10 samples [dropdown] [delete]
				[delete]