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

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- LeeAnn Higgins (higgi022@umn.edu)

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
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.
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.