# CareerTech Information Management System (CTIMS)

Technology Center Business Master Guidebook

OKLAHOMA CareerTech

IMD   Information Management Division

June 2023

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# CTIMS Support

If you have questions about submitting information in CTIMS, please contact CTIMS Support at CTIMSSupport@careertech.ok.gov, contact:

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## Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact CTIMSSupport@careertech.ok.gov. Send a message describing your problem. Include your school name and your telephone number and we will contact you. Someone is always monitoring that inbox and will return your email swiftly.

If you have forgotten your password, click the **Forgot your password?** link to reset.

For helpful tips, see the CTIMS Helpful Hints section of this document.

**IMPORTANT:** Please log into CTIMS using the latest version of Microsoft Edge , Google Chrome , or Mozilla Firefox . CTIMS is currently not compatible with other browsers.

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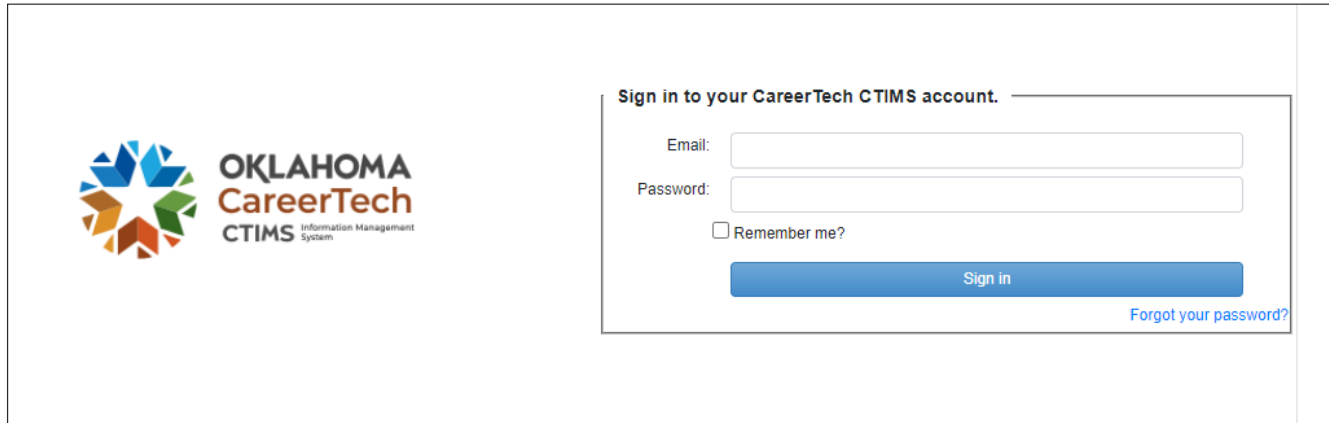**CTIMS Customer Support Contact**
Elizabeth Richardson
Office: (405) 743-5134
Email: CTIMSsupport@careertech.ok.gov

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*Objective: This guidebook will take you through the steps to search for business names & codes and to request new business codes in CTIMS.*

## Logging into CTIMS

Sign in using your school email and CTIMS password at Contact — CareerTech (CT) - okcareertech.org



Or go to CTIMS (CareerTech Information Management System) (oklahoma.gov) and select the CTIMS tab.
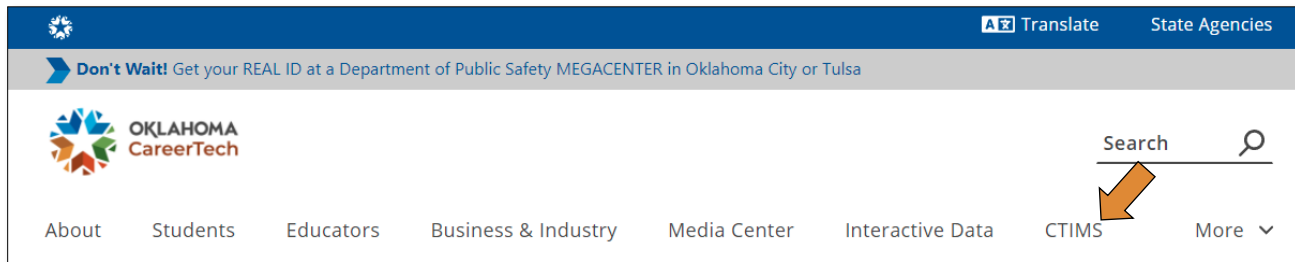


On the IMD website, select the green CTIMS Login button.
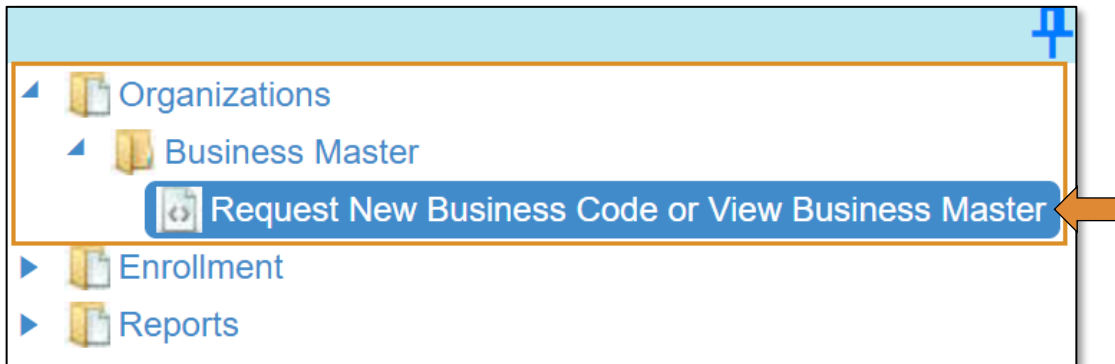
## Accessing the Business Master Module

If you have more than one role in CTIMS make sure you have the correct role selected. Verify that you are signed in with the role of **Technology Center – Full-time Submitter**, **Technology Center – WED Submitter** or **EDI – Local Coordinator** in the top right-hand corner. Use the drop-down arrow to select your role, if necessary.

If you do not see **Technology Center – Full-time Submitter**, **Technology Center – WED Submitter** or    **EDI – Local Coordinator**, contact CTIMSSupport@careertech.ok.gov.
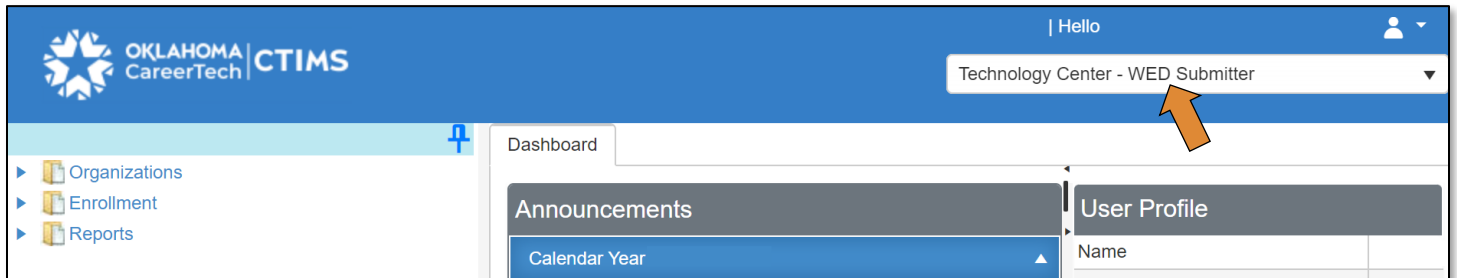


- Click the arrows next to **Organizations** & **Business Master**.
- Click on the **Request New Business Code or View Business Master** link.

The tagged numbers in the screenshot correspond to the instruction steps below.
NOTE: The red asterisks* represents a required field.

1. To search for an existing business record, select **Find Existing Business**.
2. Click on the down arrow on the **Business Name** box to select different search options.
   - You can search by **Business Name**, **Business Code**, **City** or **All**.
3. If you choose **Business Name**, **Business Code** or **City**, type at least one character in the **Enter Search Text** box, then select the **Search** button.
   - If you select **ALL** and do not enter in any criteria, all records will be displayed.
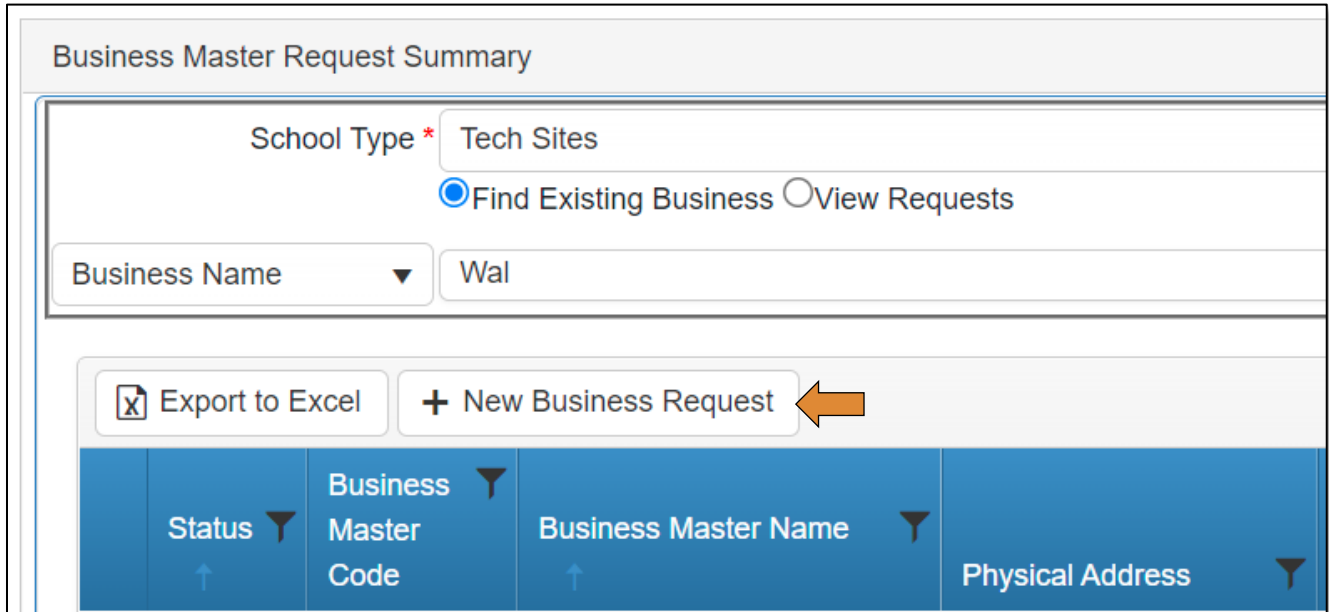4. Click **Search**.
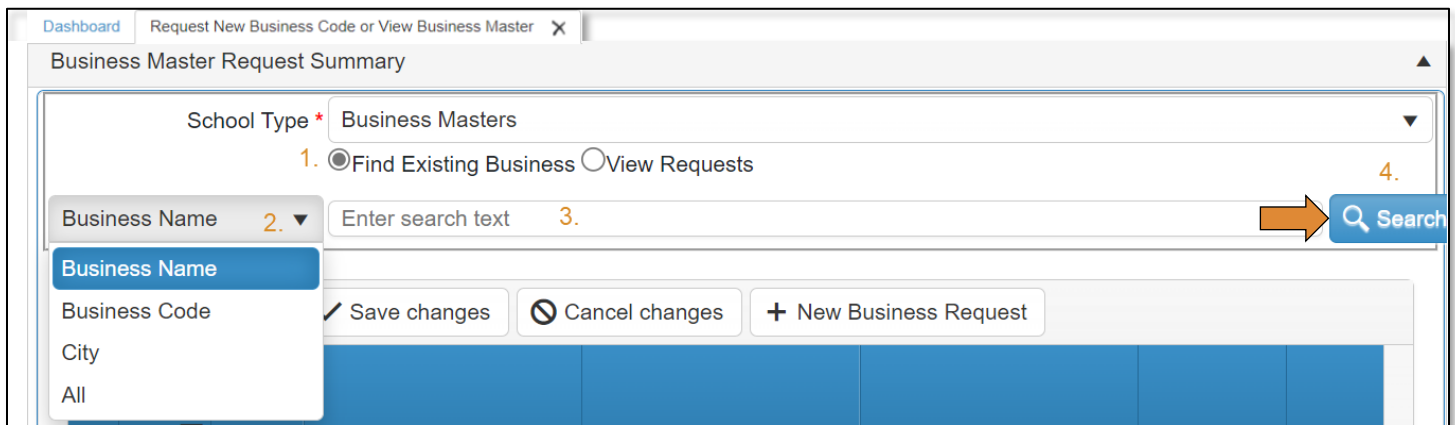


There may be more than one business with the same name. Match your business name with the address. Also, the same business name could have hyphens or be one word. If a business name has hyphens, try searching with and without the hyphens. **NOTE:** You can expand columns by hovering over the line between the columns, the pointer changes to a double arrow, move the arrow right or left to change the size of the column.



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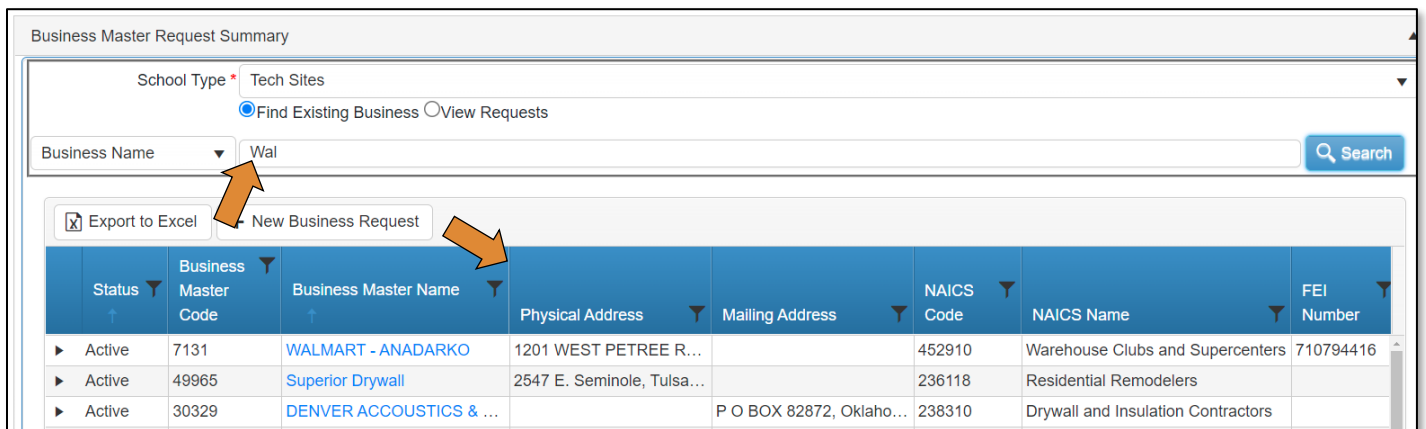
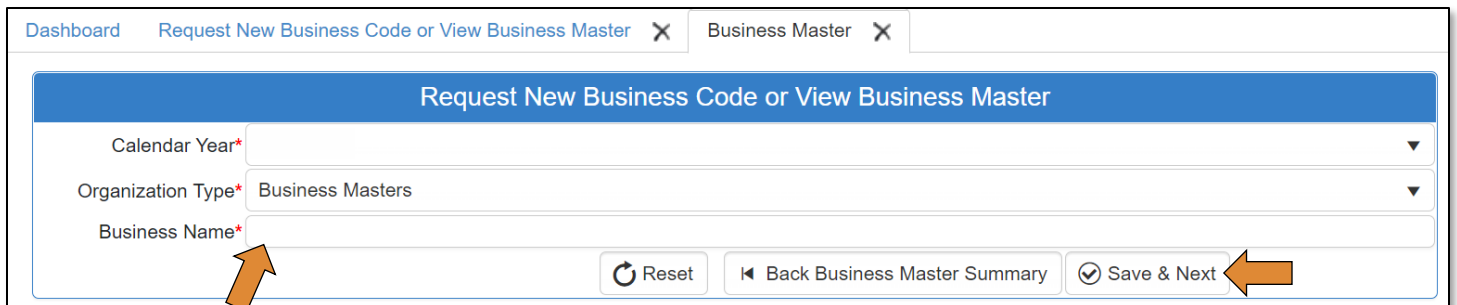## Requesting a New Business Code

If a business is not found:

- Request a new business code by clicking on the **+ New Business Request** button.
  - You will be directed to a new screen.



- In the box next to **Business Name**, enter the name of the business. The business name must be unique. If the business is a chain or the name already exists, you will need to add a unique identifier, such as a town name or store number to define it.
- Click **Save & Next.**
  - You will be directed to a new screen.

## Entering Information for New Business

- Click the drop-down to choose the **Primary NAICS Code**, start typing in the NAICS number or a title keyword, the selection will filter down the more you type in.
- Enter the **FEI Number** and **DUNS Number,** if applicable.
- If the NAICS code begins with a **92**, you <u>must</u> select the **Business Type** (City Business, County Business, State Business, or Federal Business.)
- Complete the **Physical** and **Mailing** addresses. The Physical address is mandatory. Enter the mailing address if it is different than the physical address. **NOTE:** When information is entered in the address fields, a red triangle will appear in the upper left corner of the box; this does not mean there is an error, only that data has been entered in the field.
- Click on the **Refresh** button if you would like to clear the form and start over.
- Click **Submit for Approval**.
  - If you are missing any data elements, you will get an error message when you try to submit. Correct the errors and resubmit.

- Click the **OK** button.
    - Your request has now been successfully submitted for review.

Feel free to email CTIMSsupport@careertech.ok.gov to let us know you have submitted a business code request.

You will receive an email from CTIMS@careertech.ok.gov indicating that your request was successfully submitted.
No additional action is required from you at this point.

CareerTech <ctims@careertech.ok.gov>
New Business Master - Action Required - Fully Approved

To ■ Andra Beyer
Cc ■ Andra Beyer

Business Code: 50142
Business Name: Andra's Flower Shop
Approval Stage: Fully Approved Stage
Approver School Name: Oklahoma Department of Career and Technology Education
Approver Name: Beyer Andra
Approval Status: Submitted successfully

**Approval Process Note:**

If action is required by your role, click the URL to access the CTIMS application: https://ctims.okcareertech.org/CTBDSWeb
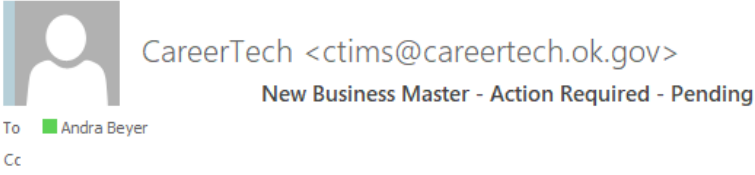
**Note:**

The following browsers are recommended:

Microsoft Edge ,Google Chrome ,Mozilla Firefox

CTIMS is not recommended with other browsers.

For assistance, contact us at ctimssupport@careertech.ok.gov

Thank you,

CareerTech Information Management Division

If your Business Code request is rejected, you will get an email stating that your Approval Status is **Rejected**. The reason for the rejection will be listed in the **Approval Process Note** in the rejection email. See instructions for the Change Request process to make corrections and resubmit your request.

CareerTech <ctims@careertech.ok.gov>
New Business Master - Action Required - Pending

To  Andra Beyer
Cc

Business Name: Hobby Lobby Distribution- S OKC
Approval Stage: Fully Approved  Stage
Approver School Name: Oklahoma Department of Career and Technology Education
Approver Name: Beyer Andra
Approval Status: Rejected

**Approval Process Note:** Please add physical address.
**Action Required Details**
Next Stage: Business Submitter
Next Stage User: kumarendra.mishra@omes.ok.gov
Approval Status: Pending

If action is required by your role, click the URL to access the CTIMS application:  https://ctims.okcareertech.org/CTBDSWeb

***Note:***

The following browsers are recommended:

Microsoft Edge ,Google Chrome ,Mozilla Firefox

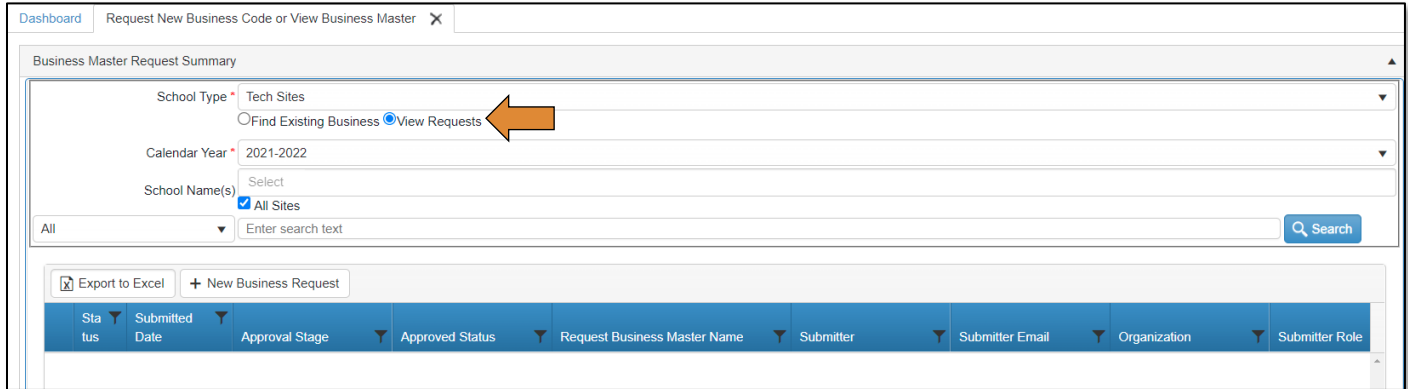CTIMS is not recommended with other browsers.

 For assistance, contact us at ctimssupport@careertech.ok.gov

Thank you,

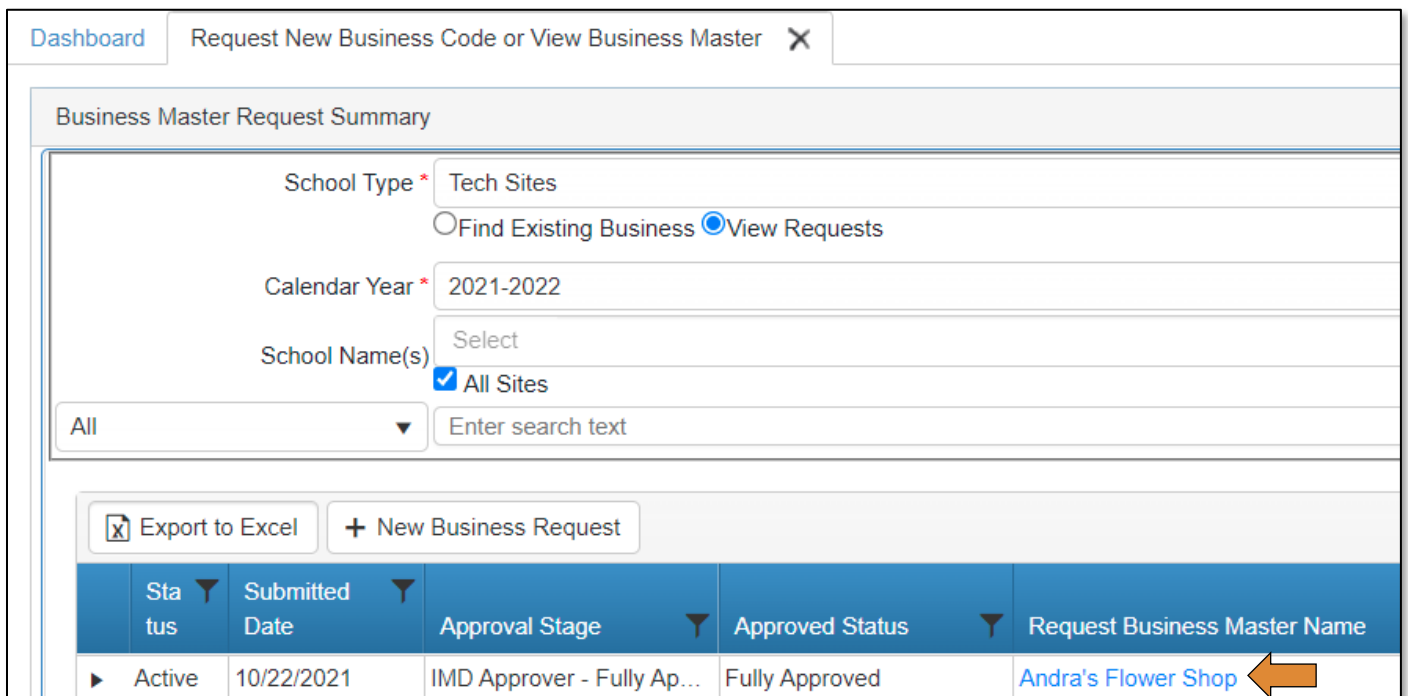CareerTech Information Management Division

## Change Request

If changes need to be made after submitting a Business Code request, but before it is fully approved, or if your request is rejected, you will need to go through the change request process to make changes.

- Select the **View Requests** radio button.
  - To see only the requests submitted by your site, uncheck the box next to **All Sites**.
- Type the first 3 letters of your school name in the **School Name(s)** box and select your school.
- Click on the **Search** button.



- Select the request you wish to change by clicking on the blue Business Master Name hyperlink.

- Click the **Change Request** button.



You will get a popup indicating you are going to cancel the approval process and initiate the change request process.

- Click **OK**.



- Make the necessary changes to your request.
- Click on **Submit for Approval**.

- Click OK on the popup screen.
    o You will be directed to another screen.



- Click on the **Approve** button if you are ready to finalize your changes.



- Click **Ok**.
- Click **Ok**, again.

## View Requests

View the business requests that you have submitted by returning to the screen with the tab entitled **Request New Business Code or View Business Master**.

- Select the radio button beside **View Requests.**
- To see only the requests submitted by your site, clear the check mark beside **All Sites**.
- Type the first 3 letters of your school name in the **School Name(s)** box and select your school.
- Click on the **Search** button.



This will bring up the list of requests.

- To see the status of the request, click on the black arrow at the beginning of the row, to the left of the Status column.



You can view the details of the business request as it moves through the approval process.

| Export to Excel | + New Business Request | | | |
|---|---|---|---|---|
| **Status** | **Submitted Date** | **Approval Stage** | **Approved Status** | **Request Business Master Name** |
| Active | 10/22/2021 | IMD Approver - Fully Ap... | Fully Approved | Andra's Flower Shop |

| Approval Stage | Approval Status | Approval/Rejection Note |
|---|---|---|
| Business Submitter - 1st Stage | Approved | New Process |
| Business Submitter - 1st Stage | Cancel for Change ... | Initiated Change request process. |
| Business Submitter - 1st Stage | Cancel for Change ... | Change Request Process |
| Business Submitter - 1st Stage | Approved | |
| IMD Approver - Fully Approved  Stage | Approved | |