



# Events Preliminary Request (EPR)

Instructional e-Builder Guide

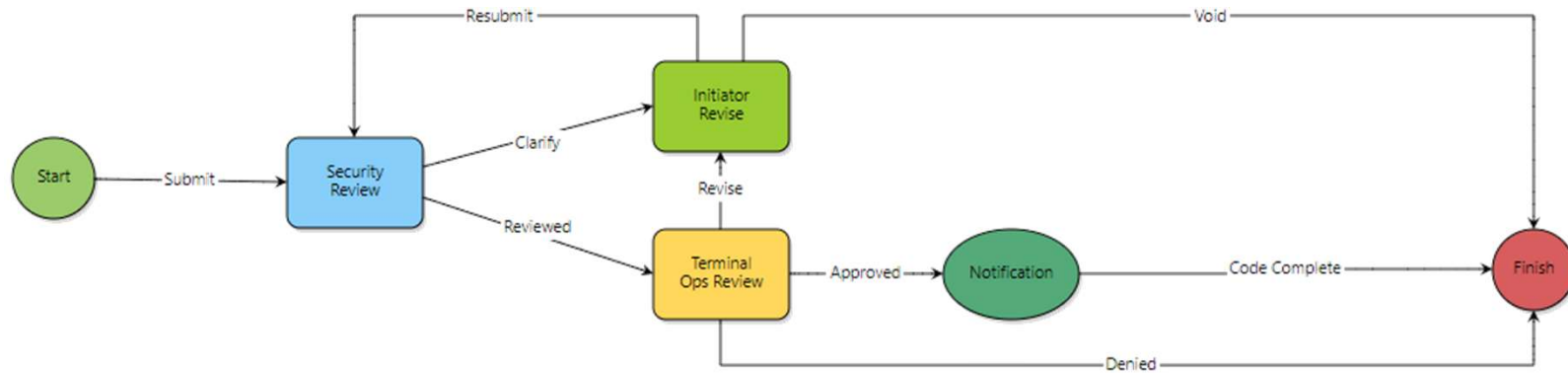


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# Workflow Diagram



## Description of the Process

The Events Preliminary Request (EPR) process is used by the Terminal Operations division to request date, time, and location for events.

## Process Steps

- The Events Preliminary Request (EPR) process is initiated by the internal CLT members and Tenants.
- Once submitted, the process will be routed to the CLT Security Manager for review and he/she will take the action **Reviewed** to move the process to the CLT Terminal Ops Review Group for review or take the action **Clarify** to move the process back to the process initiator for revisions.
- If the *Reviewed* action is taken, the CLT Terminal Ops Review Group will open the process for review and will take one of the following actions:
  - **Approved** to move the process to the Mail Merge notification step for closeout.
  - **Revise** to move the process back to the previous step for revisions.
  - **Denied** to void the process and move it to the Finish step.
- If the *Approved* action is taken, a Mail Merge email notification will be sent to the CLT Admin/Records Liaison and the PDF of the Mail Merge will be housed in the 005 Processes folder of the associated project, the process will then close out.

## Navigating to the Process

- The EPR Process can be started by following the steps, below:
  - Navigate to e-Builder and login to the system
  - Click on the Events Preliminary Request (EPR) hyperlink located under the 'Quick Add' menu
  - If the hyperlink is missing, click the "View More" Hyperlink
  - At the prompt, select the appropriate Project Name and Process Name
  - (\*) **Project Name:** Selected Project
  - (\*) **Process Name:** Events Preliminary Request (EPR)
  - Click **Continue** to start the selected process



### Quick Start

\*\*\* To navigate without "Quick Start", users can select the "Processes" tab > select the appropriate project from the drop-down in the "All Projects" bar > select "Start Process" > select "Events Preliminary Request (EPR)" from the list \*\*\*

# Starting the Process

The internal CLT members and Tenants can initiate the process and will be expected to fill out all required fields (\*) as well as any additional information in the non-required fields

- Once complete, click the Submit button located at the top or bottom of the screen

## Events Preliminary Request (EPR)

The screenshot shows the 'Events Preliminary Request (EPR)' form. At the top, there is a 'Start Process' section with a 'Submit' button highlighted by a red arrow. Below this, the form is divided into sections: 'Details', 'Documents (0)', 'Attached Processes (0)', and 'Attached Forms (0)'. The 'General Information' section contains fields for 'Tenant/ Sub-Tenant Company Name', 'Tenant Contact', 'Tenant Phone #', 'Tenant Email', 'Target Audience', 'Event Date', 'Event Time Start', 'Event Time End', 'Event Location', 'Purpose of the Event', 'Day of Event Point of Contact Information', and 'Permit(s) Required?'. The 'Requesting Entity' section includes checkboxes for various entities and a text field for 'Entity Other'.

**Start Process** Print Copy Check Spelling Show Workflow Submit Save Draft Delete Draft Cancel

Project: zzz - Geordian H Test Project  
Project Number: zzzTesting  
Process: Events Preliminary Request  
\* Subject: Test Event Request

**Details** Documents (0) Attached Processes (0) Attached Forms (0)

Expand All | Collapse All

**General Information**

\* Tenant/ Sub-Tenant Company Name:

\* Tenant Contact:

\* Tenant Phone #:

\* Tenant Email:

\* Target Audience:

\* Event Date:

\* Event Time Start:

\* Event Time End:

\* Event Location:

\* Purpose of the Event:

\* Day of Event Point of Contact Information:

\* Permit(s) Required?: ☐ Yes ☐ No ☐ Not Known

\* Requesting Entity: ☐ Tenant ☐ Administrative Services ☐ Business and Revenue ☐ Commercial & Community Engagement ☐ Development ☐ Facilities ☐ Finance ☐ Innovation and Experience ☐ Joint Operations ☐ Operations ☐ Strategic Communications ☐ Technology ☐ Other

Entity Other:

## Starting the Process Cont.

- The process initiators will also be required to provide the Events Requirements and identify the CLT Services needed for the event
- Once all the required information is provided, the process initiator will take the action **Submit** to move the process to the CLT Security Manager for review

The screenshot displays a web form titled "Event Requirements" with several sections for data entry:

- Secured Doors:** Includes a question "Are you requesting any doors be propped open or overridden?" with radio button options (Yes, No, N/A) and a text area for "General Description of Doors(s)".
- Door number:** A text field with the instruction "If known, list all door numbers that will be accessed during this event."
- Catering:** A question "Will this event be catered?" with radio button options (Yes, No, N/A).
- Right of Refusal:** A question "If yes, has HMS Host been given first right of refusal?" with radio button options (Yes, No, N/A).
- Event Handouts:** A question "Will handouts be distributed for this event?" with radio button options (Yes, No, N/A) and a text area for "List of Event Handouts".
- External Decorations:** A question "Will any external decorations, items, supplies and tools be brought through the restricted areas?" with radio button options (Yes, No, N/A) and a text area for "External Decorations, Items, Supplies Logistics".
- Non-Badged Guests:** A question "Will there be any non-badged guests attending the event?" with radio button options (Yes, No, N/A) and a text area for "Who will be escorting the non-badged guest?".
- Media Attendance:** A question "Will media be in attendance?" with radio button options (Yes, No, N/A) and a text area for "If media is in attendance, who is the media contact for your organization?".
- Event Signage:** A question "Will signage be displayed during the event?" with radio button options (Yes, No, N/A) and a text area for "If signage is needed, where will it be located?".
- CLT Services:** A section titled "Services requested from CLT" with checkboxes for "Tables and Chairs", "PA System announcements/silencing", "Technology needs", "Messaging on digital screens", "Trash", and "None".
- Additional Comments:** A text area for "Additional Comments or Requests".

At the bottom of the form is a navigation bar with buttons: "Print", "Copy", "Check Spelling", "Show Workflow", "Submit" (highlighted with a red arrow), "Save Draft", "Delete Draft", and "Cancel".



# Security Review

- The CLT Security Manager will open the process for review and will be required to identify the following:
  - If a Security Amendment is required?
  - Is the request for doors prop or override approved?
- The CLT Security Manager will take the action **Reviewed** to move the process to the Terminal Ops Review or take the action **Clarify** to move the process back to the process initiator for revisions

The screenshot displays the CLT Security Manager interface. At the top, there is a header bar with a dropdown menu labeled "-- Please select an action --" and a "Take Action" button. Below this, the main content area is divided into two sections. The left section, titled "Details", contains a form with the following fields: "Project: zzz - Geordian H Test Project", "Process Document: EPR - 3", "Current Workflow Step: Security Review", "Subject: Test Event Request", and "Status: Submitted". The right section, titled "Comments (0)", contains a form with the following fields: "Project Number: zzzTesting", "Overall Due Date:", and "Stop Due Date:". Below the "Details" section, there is a blue box with the text: "This process will stay in your court until you take action. Take the action of **Clarify** to send this back to the initiator or **Reviewed** to send it to the Terminal Ops team for approval. For general clarification needs, consider utilizing the 'Comments Tab' and select 'Requested Comments' to send a comment to the desired user." Below this, there is a section titled "How to Request a Comment". At the bottom, there is a section titled "Security Review" with the following fields: "Is a Security Amendment required?" (radio buttons for Yes, No, N/A), "Is this request for doors prop or override approved?" (radio buttons for Yes, No, N/A), and "Approved Route:" (text input field).

# Initiator Revise

- The Process Initiator will open the process for review and will need to refer to the comment tab to review any recommended changes
- Once the changes have been made, the Process Initiator will take the action **Void** to move the process to Finish step or **Resubmit** to move the process back to the CLT Security Manager for review.

Project: zzz - Georgian H Test Project  
 Process Document: EPR - 4  
 Show History | Current Actors  
 Current Workflow Step: Initiator Revise Show Workflow Diagram  
 \* Subject: Test Event Request  
 Status: Submitted

-- Please select an action --  
 -- Please select an action --  
 Void  
 Resubmit

Take Action

Check Spelling Print Copy Delegate Save Cancel

Project Number: zzzTesting  
 Overall Due Date:  
 Step Due Date:

Details Comments (1) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Expand All | Collapse All

**General Information**

The process was returned to your court because clarification is needed. Please refer to the comments tab to review what information needs to be clarified.

\* Tenant/ Sub-Tenant Company Name: Tenant G  
 \* Tenant Contact: Gee  
 \* Tenant Phone #: 123-456-7890  
 \* Tenant Email: gee@gmail.com  
 \* Target Audience: Test

\* Permit(s) Required?: Will permits be required for this event?  
☐ Yes  
☐ No  
☒ Not Known

\* Event Date: 08.30.2024  
 \* Event Time Start: 04:00 PM  
 \* Event Time End: 07:00 PM  
 \* Event Location: Test  
 \* Purpose of the Event: Test

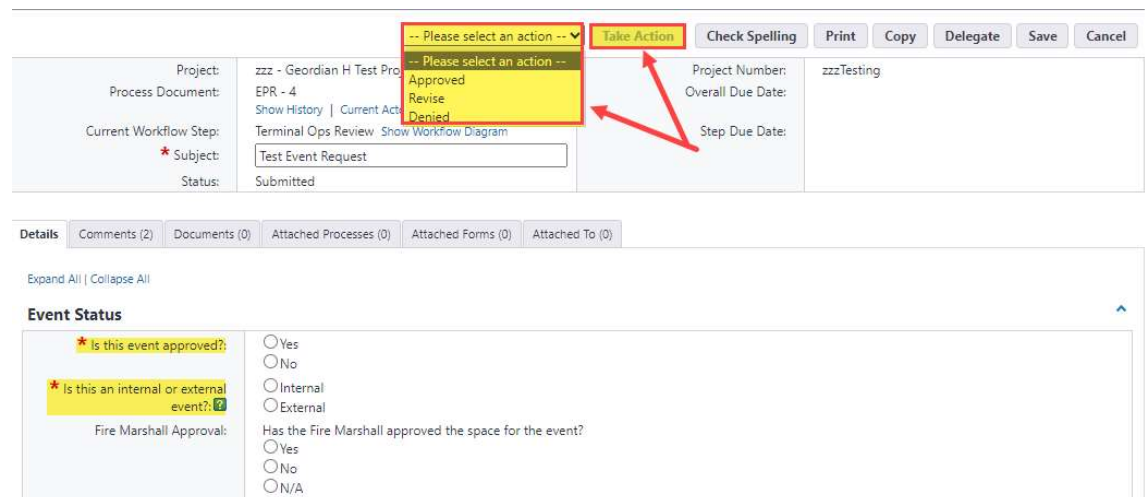
\* Day of Event Point of Contact Information: Name: Test  
 Phone Number:  
 e-Mail Address:

\* Requesting Entity:  
☒ Tenant  
☐ Administrative Services  
☐ Business and Revenue  
☐ Commercial & Community Engagement  
☐ Development  
☐ Facilities  
☐ Finance  
☐ Innovation and Experience  
☐ Joint Operations  
☐ Operations  
☐ Strategic Communications  
☐ Technology  
☐ Other

Entity Other: Provide the entity company name and contact information if other is selected above.

# Terminal Ops Review

- The CLT Terminal Ops Review Group will open the process for review and will be required to provide the following information:
  - Is the event approved?
  - Identify if the event is internal or external?
- The CLT Terminal Ops Review Group can take one of the following actions
  - **Approved** to move the process to the Mail merge notification step for closeout
  - **Revise** to move the process to the Process Initiator for revisions
  - **Denied** to move the process to the Finish step



Project: zzz - Georgian H Test Pro  
Process Document: EPR - 4  
Show History | Current Act  
Current Workflow Step: Terminal Ops Review Show Workflow Diagram  
★ Subject: Test Event Request  
Status: Submitted

-- Please select an action --  
Approved  
Revise  
Denied

Take Action

Check Spelling Print Copy Delegate Save Cancel

Project Number: zzzTesting  
Overall Due Date:  
Step Due Date:

Details Comments (2) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Expand All | Collapse All

**Event Status**


★ Is this event approved?  
☒ Yes  
☐ No

★ Is this an internal or external event?  
☒ Internal  
☐ External

Fire Marshall Approval: Has the Fire Marshall approved the space for the event?  
☒ Yes  
☐ No  
☐ N/A

# Notification

- Once the event is approved, a mail merge notification will be sent to the CLT Admin/Records Liaison and will be housed in the 005 Processes folder in the associated document module

Events Preliminary Request		EPR #	4
CITY OF CHARLOTTE AVIATION DEPARTMENT 5601 Wilkinson Blvd. Charlotte, NC 28208			
<b>Event Status</b>			
Is this event approved?	Yes		
Fire Marshall Approval:	Yes		
<b>Security Review</b>			
Security Amendment:	Yes- amendment needed, allow 45 days for processing		
Request for doors propped or override approved?	Yes		
Approved Route:	Test Approved Route		
<b>General Information</b>			
Tenant/Sub-Tenant Company Name:	Tenant G		
Tenant Contact:	Gee		
Tenant Phone #:	123-456-7890		
Tenant Email:	gee@gmail.com		
Purpose of the Event:	Test		
Event Date:	08.30.2024		
Event Time Start:	04:00 PM		
Event Time End:	07:00 PM		
Event Location:	Test		
Requesting Entity:	Tenant		
Entity Other:			
Day of Event Point of Contact Information:	Name: Test Phone Number: e-Mail Address:		
Target Audience:	Test		
Permit(s) Required?	Not Known		
<b>Event Requirements</b>			
Secured Doors:	Yes		
General Description of Door(s):	Test		
Door Number:	2,3,4		
External Decorations:	Yes		
External Decorations, Items, Supplies, Logistics:	Testing		

## Questions?

- The Help Desk Ticket (HDT) process is to be used to address any e- Builder related questions, issues and/or requests
- In e-Builder: Select Process > Processes > Start Process > Help Desk Ticket > Complete the information on the HDT > Submit
- If additional help is needed on the Help Desk Ticket, please refer to the HDT Guide available in e-Builder project **\*CLT Airport e- Builder How To Guides - Instructional Guides.**

### Help Desk Ticket (HDT)

Start Process

Cancel

\* Project

Please Select a Project...

\* Process

Help Desk Ticket (HDT)

