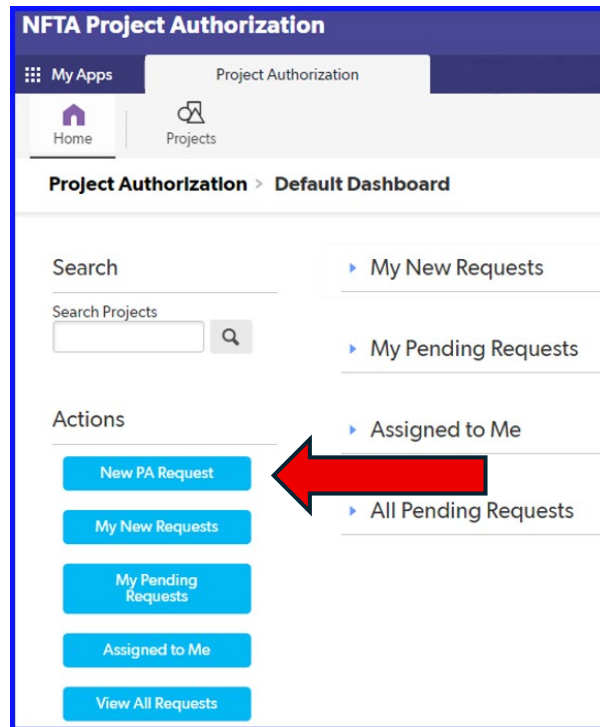


# Project Authorization Request

1. Log in to Quickbase and navigate to your PROJECT AUTHORIZATION widget
2. Select the **NEW PA REQUEST**



3. **PROJECT TAB** - The following fields are required to create your project.
- a. Business Center (BNIA, NFIA, etc.)
  - b. Description and Justification
    - i. Before entering the Description, please enter a date. This will help when PBM's are created later.
    - ii. Please make the description as detailed as possible but also remember to simplify, so a person not in your respective field can understand. (ex. so FP&A can understand Engineering)
  - c. Project Title – Typically the Project Book title.
  - d. Project Book Title – The approved Budget Book Title.
  - e. Project Budget Book Page – Board approved Budget Book page. (ex. 9-20)

NIAGARA FRONTIER TRANSPORTATION AUTHORITY  
FY 2025/26 THROUGH FY 2029/30 FISCALLY CONSTRAINED CAPITAL PLAN

GENERAL COUNSEL

| PROJECT TITLE                       | PROJECT NUMBER | PRTY CL | JUST CL | FUND SOURCE | TOTAL PROJECT BUDGET | PROJECT ACTUAL THROUGH 3/31/26 | FISCAL YEAR 2025/26 | FISCAL YEAR 2026/27 | FISCAL YEAR 2027/28 | FISCAL YEAR 2028/29 | FISCAL YEAR 2029/30 | OUT YEARS | APRIL EXP | VAR |
|-------------------------------------|----------------|---------|---------|-------------|----------------------|--------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------|-----------|-----|
| <b>NEW PROJECTS</b>                 |                |         |         |             |                      |                                |                     |                     |                     |                     |                     |           |           |     |
| EXAMPLE 1                           | --             | --      | NI      | NFTA        | \$70,000             | \$0                            | \$35,000            | \$35,000            | \$0                 | \$0                 | \$0                 | \$0       | \$0       | \$0 |
| <b>PREVIOUSLY BUDGETED PROJECTS</b> |                |         |         |             |                      |                                |                     |                     |                     |                     |                     |           |           |     |
| EXAMPLE 2                           | --             | 1       | NI      | NFTA        | \$1,465,000          | \$0                            | \$465,000           | \$500,000           | \$500,000           | \$0                 | \$0                 | \$0       | \$0       | \$0 |
| EXAMPLE 3                           | --             | --      | NI      | NFTA        | \$100,000            | \$0                            | \$100,000           | \$0                 | \$0                 | \$0                 | \$0                 | \$0       | \$0       | \$0 |
| NFTA                                |                |         |         |             | \$1,635,000          | \$0                            | \$600,000           | \$535,000           | \$500,000           | \$0                 | \$0                 | \$0       |           |     |

11-8

- Project
- Tasks
- Attachments
- Approvals
- Funds
- Actions
- History

Project Origination

Business Center \*

Requestor Vinovski, Rikki

Project Details

Description and Justification \*

Project Id

Project Title \*

Project Budget Book Title \*

Project Budget Book Page \*

Project Number - Cost Center

Project Number - Parent Project

Project Number Engineering

Project Dates

Project Start Date

Project End Date

#### 4. TASKS TAB

- a. In this section you will fill in how your budget should be allocated.
- b. Enter amounts on lines that will be used for the project. **Green Arrow**
  - i. Construction
  - ii. Salaries
  - iii. Etc.
  - iv. The total budget will be calculated by the program. Do Not go over your Budget book total. **red arrow** - The total of the individual tasks must tie to the total budget.
  - v. Standard categories are the most used. Others are only used in special situations.
- c. **DO NOT enter anything into the CCN (cost control #) field. This will be done by the FP&A department.**

Home > Projects > Reports > Add Project Request

Project
Tasks
Attachments
Approvals
Funds
Actions
History

**▼ Total Budget**

|                      |        |                       |             |                    |
|----------------------|--------|-----------------------|-------------|--------------------|
| Total Prev Budget    | \$0.00 | Total Budget          | \$18,000.00 | ← <b>Red Arrow</b> |
| Total Funding Amount | \$0.00 | Total Funding Percent | 0.00%       |                    |

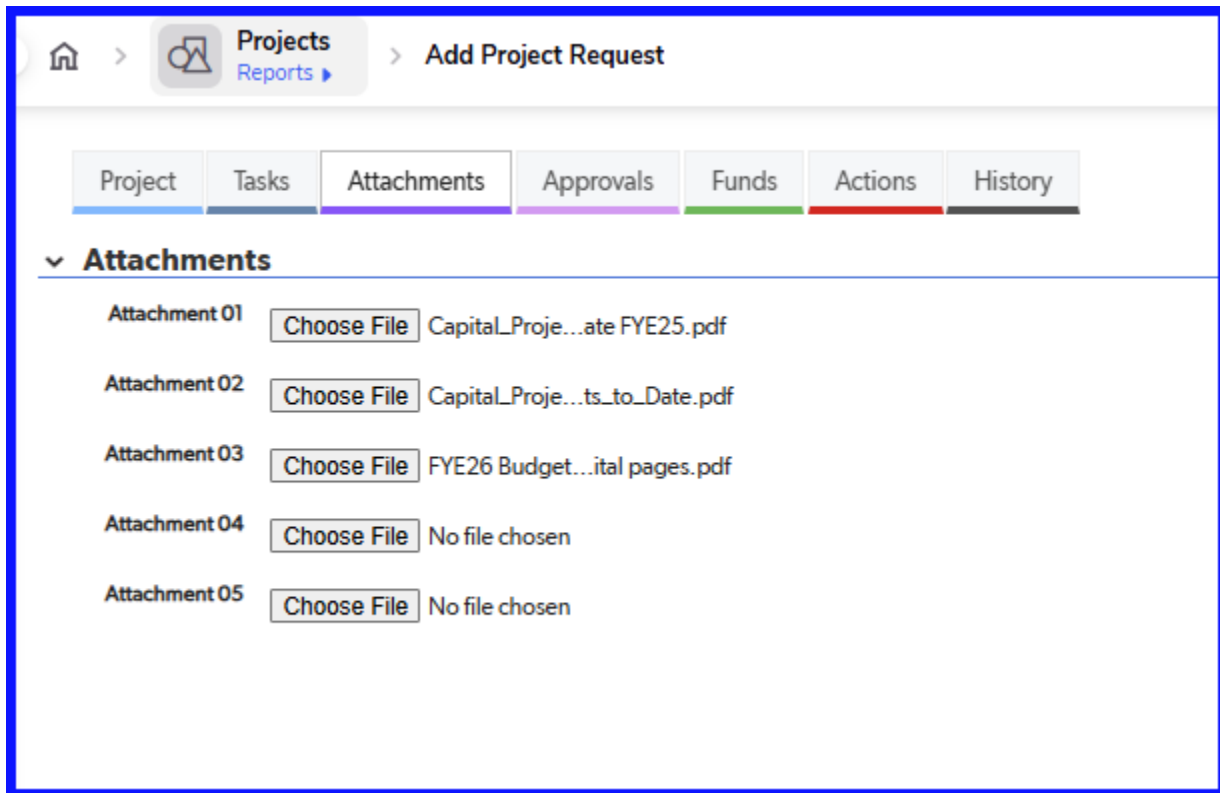
**▼ Tasks - Standard**

| Task Num | Category       | Task                                  | Prev Budget | Budget               | CCN                  |
|----------|----------------|---------------------------------------|-------------|----------------------|----------------------|
| Task 1   | Consultant     | Consultant - Design                   |             | <input type="text"/> | <input type="text"/> |
| Task 2   | Consultant     | Consultant - Construction Monitoring  |             | <input type="text"/> | <input type="text"/> |
| Task 3   | Services       | Services                              |             | 3000                 | ← <b>Green Arrow</b> |
| Task 4   | Services       | Construction                          |             | <input type="text"/> | <input type="text"/> |
| Task 5   | Equipment      | Equipment                             |             | <input type="text"/> | <input type="text"/> |
| Task 6   | Administration | Administration                        |             | <input type="text"/> | <input type="text"/> |
| Task 7   | Administration | Travel and Other Direct Expenses      |             | 10000                | ← <b>Green Arrow</b> |
| Task 8   | Administration | Printing and Advertising              |             | <input type="text"/> | <input type="text"/> |
| Task 9   | Administration | Salaries and Fringes                  |             | 5000                 | ← <b>Green Arrow</b> |
| Task 10  | Administration | Salaries and Fringes - Other          |             | <input type="text"/> | <input type="text"/> |
| Task 11  | Administration | Design - Engineering                  |             | <input type="text"/> | <input type="text"/> |
| Task 12  | Administration | Construction Monitoring - Engineering |             | <input type="text"/> | <input type="text"/> |
| Task 13  | Administration | Public Works Enforcement Fund         |             | <input type="text"/> | <input type="text"/> |

**▼ Tasks - Other**

| Task Num | Category | Task                 | Prev Budget | Budget               | CCN                  |
|----------|----------|----------------------|-------------|----------------------|----------------------|
| Task 14  | Other    | <input type="text"/> |             | <input type="text"/> | <input type="text"/> |
| Task 15  | Other    | <input type="text"/> |             | <input type="text"/> | <input type="text"/> |

5. **ATTACHMENTS TAB** – add documents that are pertinent to your project and will help others to approve your request
- a. Copy of your Budget Book page
  - b. Board resolution. – if applicable
  - c. Any additional information that will help other approvers to understand the need for the project. (pictures, quotes, invoices, etc.)
  - d. Add the most recent Fiscal Year End DKJ664 to show total actuals. (expenditures to date)



The screenshot displays a web application interface for adding a project request. At the top, there is a breadcrumb navigation path: Home > Projects > Reports > Add Project Request. Below this, a series of tabs are visible: Project, Tasks, Attachments (which is currently selected and highlighted in purple), Approvals, Funds, Actions, and History. Under the 'Attachments' tab, there is a section titled 'Attachments' with a dropdown arrow. This section contains five rows, each representing an attachment slot. Each row includes a label (Attachment 01 through Attachment 05), a 'Choose File' button, and a text field showing the filename or status. Attachment 01 has the filename 'Capital\_Proje...ate FYE25.pdf'. Attachment 02 has 'Capital\_Proje...ts\_to\_Date.pdf'. Attachment 03 has 'FYE26 Budget...ital pages.pdf'. Attachments 04 and 05 both show 'No file chosen'.

| Attachment ID | Choose File | Filename / Status              |
|---------------|-------------|--------------------------------|
| Attachment 01 | Choose File | Capital_Proje...ate FYE25.pdf  |
| Attachment 02 | Choose File | Capital_Proje...ts_to_Date.pdf |
| Attachment 03 | Choose File | FYE26 Budget...ital pages.pdf  |
| Attachment 04 | Choose File | No file chosen                 |
| Attachment 05 | Choose File | No file chosen                 |

6. **APPROVALS TAB** – List of 13 people who need to approve your project before the project can start.
- When there are multiple options for an approver you will have a dropdown box to choose from, otherwise the field will automatically be populated. All fields with a **RED ASTERISK \*** will need to be filled
  - Each of these fields is specific to you as the project manager.
    - Ex. Reviewing Manager – your direct supervisor
    - Ex. Finance Manager – either the NFTA or Metro Finance Manager associated with the project.
    - Etc.

▼ **Project Request Status**

---

|                     |                   |                         |     |
|---------------------|-------------------|-------------------------|-----|
| Request Type        | PA                | Request Status          | New |
| Date Approval Start | Date Approval End | Time To Process Request |     |

▼ **Assigned Approver**

---

|                          |   |                        |                   |
|--------------------------|---|------------------------|-------------------|
| Assigned Approver Number | 0 | Assigned Approver Role | Assigned Approver |
|--------------------------|---|------------------------|-------------------|

▼ **Approval Chain**

---

|                  |                            |               |   |
|------------------|----------------------------|---------------|---|
| Approver 01 Role | Reviewing Manager          | Approver 01 * | <input type="text" value="Matthew Calo"/> ▼ |
| Approver 02 Role | Finance Manager            | Approver 02 * | <input type="text" value="Matthew Calo"/> ▼ |
| Approver 03 Role | Director Business Center   | Approver 03 * | <input type="text" value="Matthew Calo"/> ▼ |
| Approver 04 Role | Engineering Review Manager | Approver 04 * | <input type="text" value="Matthew Calo"/> ▼ |
| Approver 05 Role | Director Engineering       | Approver 05   | Matthew Calo                                |
| Approver 06 Role | C.I.O.                     | Approver 06   | Matthew Calo                                |
| Approver 07 Role | Grants Manager             | Approver 07   | Matthew Calo                                |
| Approver 08 Role | Grants Specialist          | Approver 08 * | <input type="text" value="Matthew Calo"/> ▼ |
| Approver 09 Role | C.F.O.                     | Approver 09   | Matthew Calo                                |
| Approver 10 Role | Executive Director         | Approver 10   | Matthew Calo                                |
| Approver 11 Role | Capital Analyst            | Approver 11   | Matthew Calo                                |
| Approver 12 Role | Capital Accountant         | Approver 12   | Matthew Calo                                |
| Approver 13 Role | Accounting Manager         | Approver 13   | Matthew Calo                                |

7. **FUNDS TAB** – Select funding sources from the list and enter Amount and Percentage

- a. The **Total Amount** must match the total on the TASKS tab.
  - i. Will error if no match.
- b. The **Funding percentage** must equal 100%
- c. It's always a good idea to contact the Grants or FP&A department if you're unsure of Funding Allocations.
  - i. Follow the Budget book to figure out percentages

**▼ Total Funding**  
 Total Budget \$43,203.00    Total Funding Amount \$200,000.00    Total Funding Percent 100.00%

**▼ Funds**

Funding Details Attached

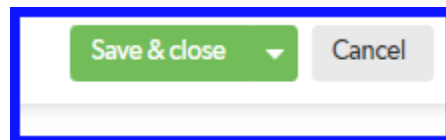
|                |                                |              |     |       |  |        |         |         |    |
|----------------|--------------------------------|--------------|-----|-------|--|--------|---------|---------|----|
| Funding Source | D04 - NFTA INELIGIBLE          | Funding Code | D04 | Grant |  | Amount | 60,000  | Percent | 20 |
| Funding Source | D01 - NFTA MATCH FUND          | Funding Code | D01 | Grant |  | Amount | 40,000  | Percent | 30 |
| Funding Source | A16 - AIRPORT DEVELOPMENT FUND | Funding Code | A16 | Grant |  | Amount | 100,000 | Percent | 50 |
| Funding Source |                                | Funding Code |     | Grant |  | Amount |         | Percent |    |
| Funding Source |                                | Funding Code |     | Grant |  | Amount |         | Percent |    |

| PROJECT TITLE   | PROJECT NUMBER | PRTY CL | JUST CL | FUND SOURCE  | TOTAL PROJECT BUDGET |
|-----------------|----------------|---------|---------|--------------|----------------------|
| PROJECT EXAMPLE | --             | --      | NI      | ADF          | \$100,000            |
|                 |                |         |         | 88C          | \$40,000             |
|                 |                |         |         | NFTA         | \$60,000             |
|                 |                |         |         | <b>TOTAL</b> | <b>\$200,000</b>     |

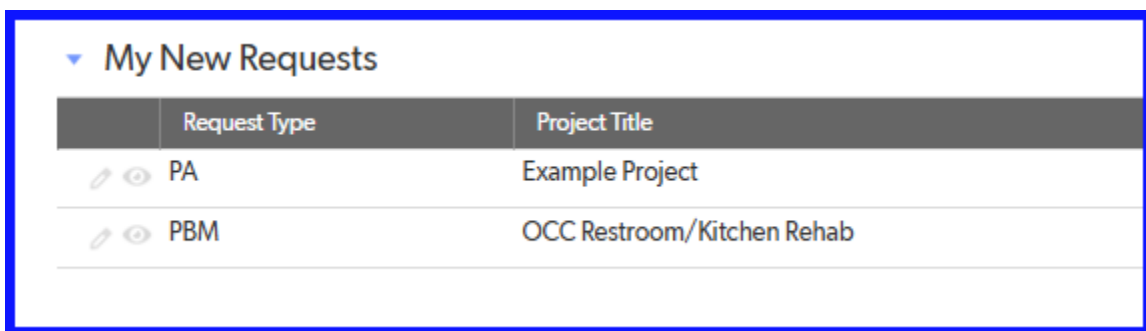
8. **ACTIONS AND HISTORY TABS** will be empty



- a. Click the Save and Close button
  - i. This will save your Project and move it to MY NEW REQUESTS



9. **MY NEW REQUESTS** – Found back on your Dashboard.



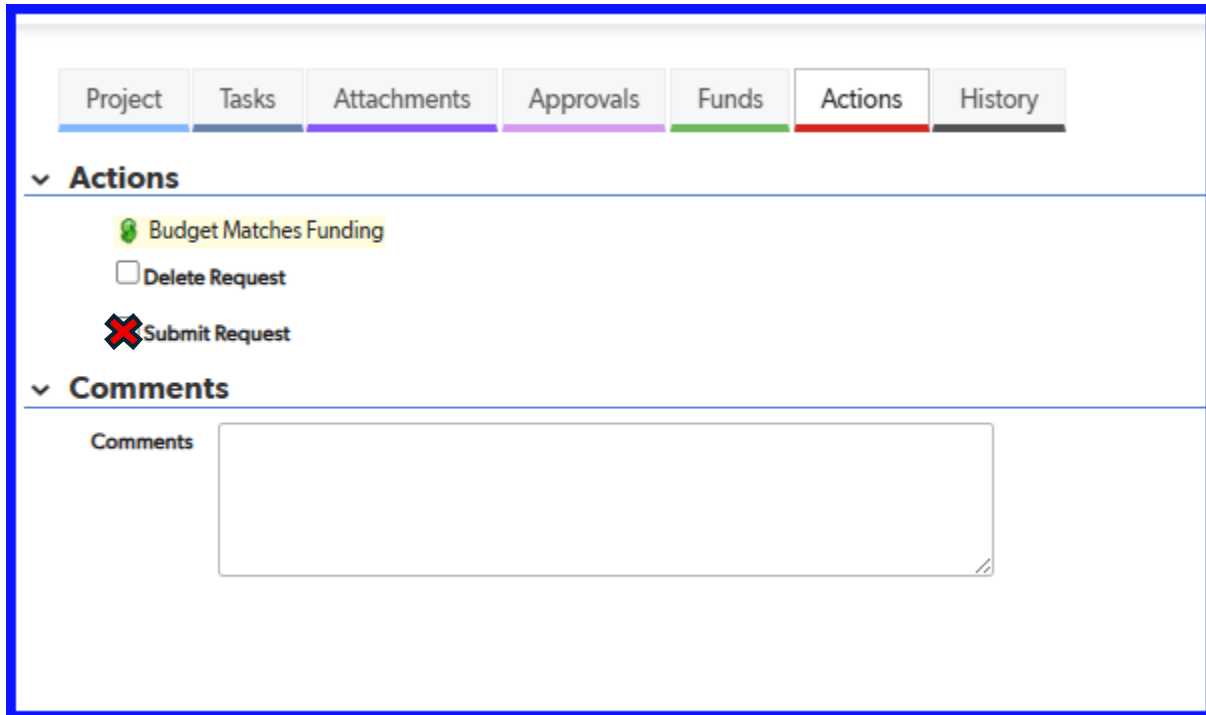
- a. Click on the Edit button
  - i. Looks like a Pencil



10. **Review each of your tabs for accuracy**

## 11. ACTIONS TAB

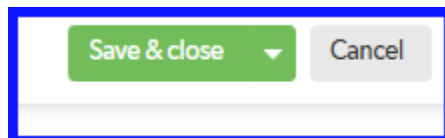
- a. Only if all your information is correct, check the SUBMIT REQUEST option



The screenshot shows a software interface with a navigation bar at the top containing tabs for Project, Tasks, Attachments, Approvals, Funds, Actions, and History. The 'Actions' tab is selected and highlighted in red. Below the navigation bar, there is a section titled 'Actions' with a dropdown arrow. Under this section, there is a yellow highlight for 'Budget Matches Funding'. Below this, there are two options: 'Delete Request' with an unchecked checkbox, and 'Submit Request' with a red 'X' icon. Below the 'Actions' section, there is another section titled 'Comments' with a dropdown arrow. Under this section, there is a text input field labeled 'Comments'.

## 12. Save and Close

- a. This will move your Project to the next assigned approver.



The screenshot shows two buttons: a green button labeled 'Save & close' with a dropdown arrow, and a grey button labeled 'Cancel'. Both buttons are enclosed in a blue rectangular border.