



# ePTF Quick Guide

## Where do I begin?

<http://buffalo.edu/hr/>

**Need Help?** – Call 645-ePTF (645-3783)  
Monday – Friday 8:00 a.m. – 5:00 p.m.

The screenshot shows the ePTF interface with two main tabs: 'Workflow' and 'Manage Tasks'. Under 'Workflow', there are four sub-tabs: 'Initiate', 'Inbox', 'Completed', and 'Queue'. Below these tabs, there is a dropdown menu with 'Eptf' selected, a 'Set Process' button, and the text 'Active Process: Eptf'. Below this, there is a table with the following content:

Process Name
<a href="#">Personnel Transaction (ePTF)</a>
<a href="#">Purchase Requisition (eReq)</a>

## My Actions

**Approve** — Incident is approved and sent to Human Resources

**Route to Approver** — Incident is forwarded to Approver

**Save without Submit** — Incident goes to your own Inbox  
It is NOT processed or submitted to the next step.

**Cancel** — Incident is removed from the ePTF system

**Reject** — Incident is returned back to the previous step

## Workflow Screens/Tabs

**Initiate Screen/Tab** — shows the ePTF process name  
*This is where a user begins a new ePTF incident.*

**Inbox Screen/Tab** — shows your active incidents  
*This is how you access your ePTF tasks (work to do).*

**Completed Screen/Tab** — shows your completed incidents.  
This is also where you can monitor the workflow of the incident.

## Helpful Hints

Use the **tab** key to move between fields — **NOT** the Enter key.

**Transaction Effective Date** is the date in which the transaction **should** take effect.



To start a new PTF and cancel the transaction you are working on, click the **Start a New PTF** located at the top left of the screen.

Click on **Refresh** to update and refresh your Inbox or Completed tab.

[Refresh](#)

## Glossary of ePTF Terms

**Approver:** The role assigned to authorize transactions

**Initiator:** The role assigned to initiate a new ePTF

**Incident #:** System generated unique number that is assigned to a PTF — displayed at the top of an ePTF and used for tracking purposes

**Required fields:** Data fields indicated by an asterisk (\*) that are mandatory and must be filled in before an incident can be moved to the next step in the ePTF process

**Step:** A series of actions that must be taken to move an ePTF  
Each step is Role specific and must be completed by a person having the assigned role, e.g. Begin, Approver1, Approver 2, HR

**Workflow:** the process of moving a task through steps from one place or person to another electronically

## Compensation Types

### Base Compensation

The employee's base rate of pay

### Also Receives

An amount that is paid in addition to the regular salary, for services performed, on a temporary basis, in addition to the duties normally associated with the position

### Department Chair Stipend

An approved annualized dollar amount that can be paid (or portion thereof) to the position incumbent in addition to his/her base annual salary, for services performed, on a temporary basis, in addition to the duties normally associated with his or her assignment as department chair

### Car Allowance

Amount paid to employees in addition to regular salary for personal automobile use for University purposes

### Temporary Salary Increase

Increase in base compensation for a specified time period for additional duties.

### Continuous Inconvenience Pay

Amount paid in addition to base compensation for individuals who work second or third shift.

### Merit

Increase to an employee's base compensation for exceptional service

### Payment

The default compensation type for extra service and participant stipend transactions.

### Bonus

A one-time amount paid to an RF employee in addition to the regular salary, for services performed above and beyond what is expected for that position