



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 sections: 'Workflow' and 'Manage Tasks'. The 'Workflow' section has tabs for 'Initiate', 'Inbox', 'Completed', and 'Queue'. Below these tabs is a dropdown menu with 'Eptf' selected and a 'Set Process' button. To the right, it says 'Active Process: Eptf'. Below this is a table with the following content:

Process Name
Personnel Transaction (ePTF)
Purchase Requisition (eReq)

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