

TREQ: Adding + Order to Pre-Auth

This guide provides a step-by-step process for adding an order to a pre-authorization in the TREQ system.

- 1 Navigate to <https://educ.uw.edu/treq/>

- 2 On the TREQ Project, scroll down and press "+ Order"

The screenshot displays the TREQ system interface for a project. On the left, a sidebar contains the email address 'dmestark@uw.edu', a 'Food purchase' entry with a date and time, a 'Business Purpose' section with a placeholder text, and an 'Attachments' section with a blue button labeled 'Open OneDrive Folder'. The main content area on the right shows a 'Pay Invoice' section, a '+ Order' button (highlighted with an orange circle), and a 'Project is Open' status. Below these, there is a section titled 'Add Order to this project:' with a pre-authorization code 'Pre-Auth: Example Event TREQ'. At the bottom, three blue buttons are visible: 'Travel Pre-Authorization', 'Travel Reimbursement', and 'Other Pre-Authorization'.

3

Choose the type of order you'd like to add. Use "Pay an Invoice" if you have an invoice to be paid. Choose "Make a Purchase" if you'd like us to make the purchase and there isn't an invoice (i.e. ordering something from a vendor).

The screenshot shows a modal window titled "Add Order" with a list of order types. The "Pay an Invoice" option is highlighted with a blue bar and a red circle. To the left of the modal, a sidebar contains a link to "Project's document help". Below the list of order types, there is explanatory text: "You can add multiple orders to a single project. This will keep your orders organized and save you data entry. For example if you have a project with a Travel Pre-Authorization, request Travel Reimbursement on the existing project." To the right of the modal, a sidebar contains a link to "Travel Pre-Authorization".

Order Types:

- Travel Pre-Authorization
- Travel Reimbursement
- Other Pre-Authorization
- Other Reimbursement
- Make a Purchase
- Pay an Invoice**

You can add multiple orders to a single project. This will keep your orders organized and save you data entry.

For example if you have a project with a Travel Pre-Authorization, request Travel Reimbursement on the existing project.

4

It will take you back to the meal type. You don't need to add this again. Just press "Cancel".

The screenshot shows a form titled "Meal Type" with a "Meal Type *" dropdown menu and an "Event Date *" field. The "Cancel" button is highlighted with a red circle. Below the form, there is a "Save & Continue" button and a link to "Add a Note". At the bottom, there is a link to "Cancel this Order...".

Meal Type *

Event Date *

mm/dd/yyyy

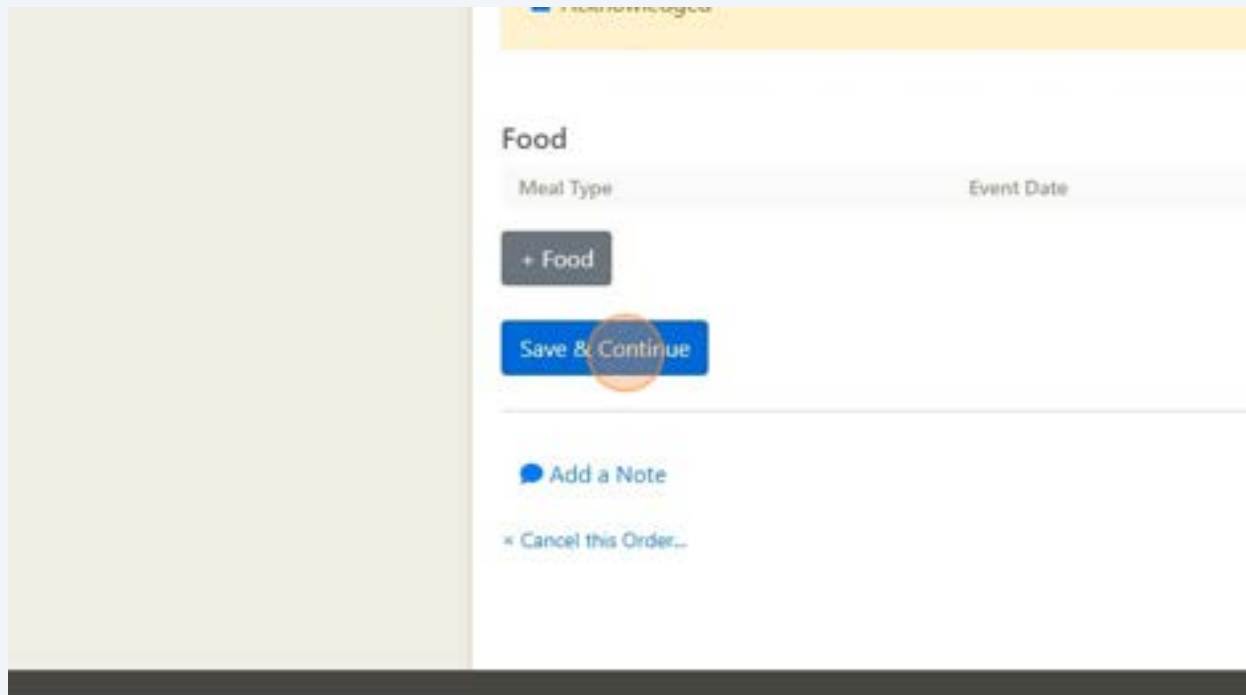
Save Delete **Cancel**

Save & Continue

Add a Note

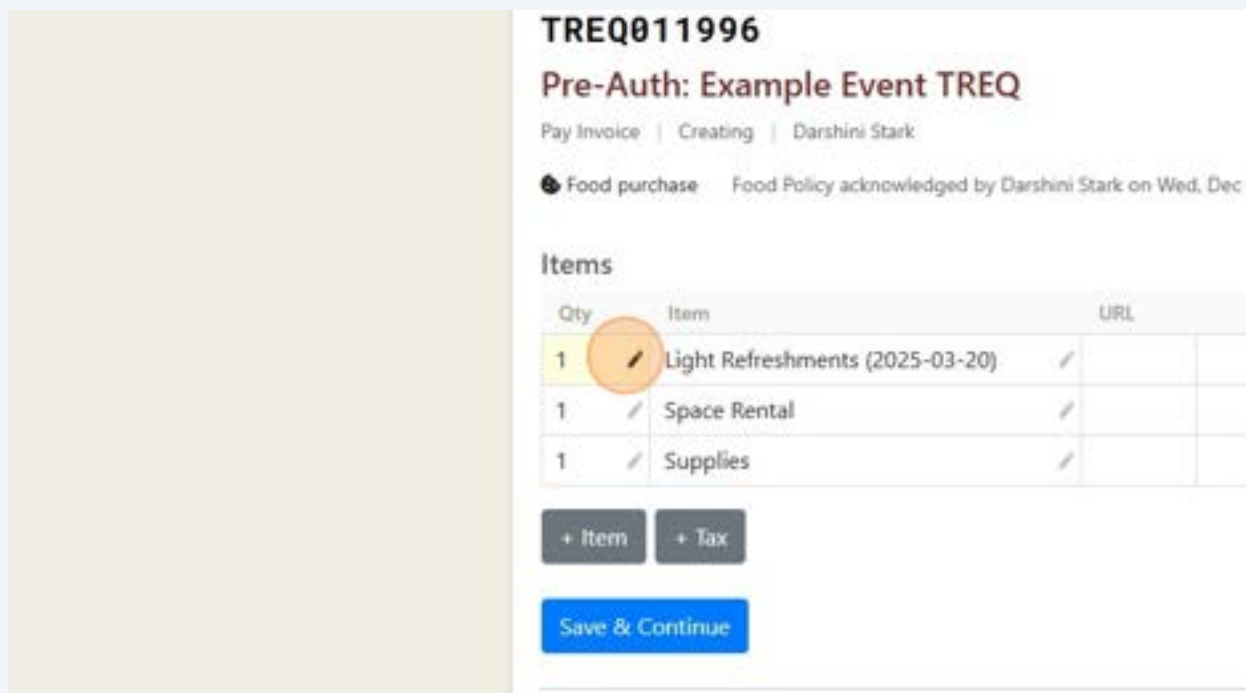
Cancel this Order...

5 Click "Save & Continue"



The screenshot shows a web interface for managing food orders. On the left is a large, empty beige sidebar. The main content area has a yellow header bar. Below it, the section is titled 'Food'. There are two input fields: 'Meal Type' and 'Event Date'. Below these is a dark grey button labeled '+ Food'. A blue button labeled 'Save & Continue' is highlighted with an orange circle. Below the button is a link 'Add a Note' and another link 'Cancel this Order...'.

6 It will auto populate all the items from the Pre-Auth. If you are making the "Pay an Invoice" just for the space rental, then remove the other two line items.



The screenshot shows a web interface for managing items. On the left is a large, empty beige sidebar. The main content area has a white header bar with the text 'TREQ011996' and 'Pre-Auth: Example Event TREQ'. Below this is a sub-header 'Pay Invoice | Creating | Darshini Stark'. A status bar shows 'Food purchase' and 'Food Policy acknowledged by Darshini Stark on Wed, Dec'. Below this is a section titled 'Items' with a table. The table has three columns: 'Qty', 'Item', and 'URL'. The first row is highlighted in yellow and has an orange circle around the 'Qty' cell. The table contains three rows of data. Below the table are two dark grey buttons: '+ Item' and '+ Tax'. A blue button labeled 'Save & Continue' is highlighted with an orange circle.

Qty	Item	URL
1	Light Refreshments (2025-03-20)	
1	Space Rental	
1	Supplies	

- 7 Open the line item you wish to delete, then press "Delete".

The screenshot shows a form with three columns: Qty, Item, and Amount. The Qty column has a value of 1. The Item column has the text "Light Refreshments (2025-03-20)". The Amount column has a value of 20. Below the form, there is a URL field and a note: "(Optional) Provide a link to a specific item to purchase". At the bottom, there are three buttons: "Save", "Delete", and "Cancel". The "Delete" button is highlighted with an orange circle. Below the form, there is a "Save & Continue" button and an "Add a Note" link.

Qty	Item	Amount
1	Light Refreshments (2025-03-20)	20

URL

(Optional) Provide a link to a specific item to purchase

Save Delete Cancel

Save & Continue

Add a Note

- 8 Repeat!

The screenshot shows a form for adding items to an invoice. The form has a header with "Pay Invoice", "Creating", and "Darshini Stark". Below the header, there is a note: "Food purchase Food Policy acknowledged by Darshini Stark on Wed, Dec 10, 2025". The form has a table with three columns: Qty, Item, and URL. The table has three rows: a plus sign (+) for "Light Refreshments (2025-03-20)", "1" for "Space Rental", and "1" for "Supplies". The "Supplies" row is highlighted with a yellow background and an orange circle. Below the table, there are two buttons: "+ Item" and "+ Tax". At the bottom, there is a "Save & Continue" button and an "Add a Note" link.

Pay Invoice | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Dec 10, 2025

Items

Qty	Item	URL
+	Light Refreshments (2025-03-20)	
1	Space Rental	
1	Supplies	

+ Item + Tax

Save & Continue

Add a Note

Qty	Item	Amount
1	Supplies	300

URL

(Optional) Provide a link to a specific item to purchase

[Save](#) [Delete](#) [Cancel](#)

[Save & Continue](#)

[Add a Note](#)

9 Click "Save & Continue"

Qty	Item	URL
+	Light Refreshments (2025-03-20)	
1	Space Rental	
+	Supplies	

[+ Item](#) [+ Tax](#)

[Save & Continue](#)

[Add a Note](#)

[Cancel this Order...](#)

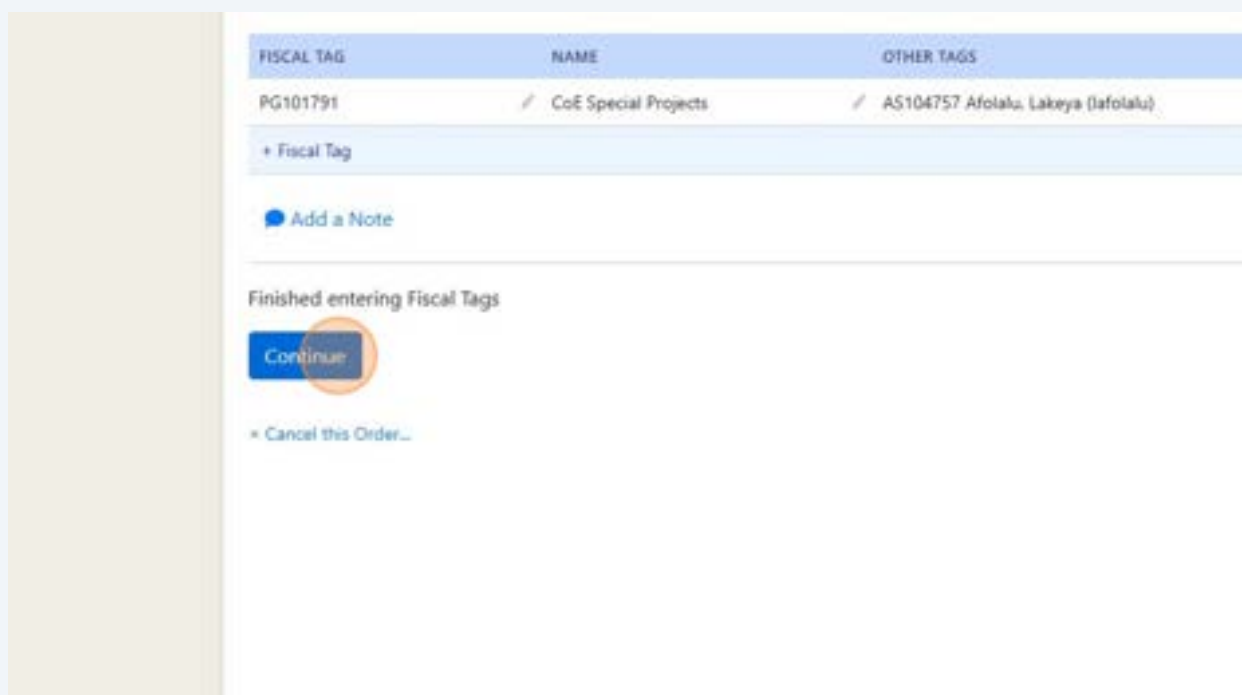
10

Upload your relevant documents to the corresponding TREQ folder in SharePoint, then press "Done Uploading".



11

If you don't have any changes to the funding, press "Continue".



12 After reviewing the order, press "Submit"!

