

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 shows a TREQ project page for 'Food purchase' (12/18/2024) by Darshini Stark. The page includes sections for attachments (OneDrive folder), project folder name (TREQ011996), and a summary of the food policy acknowledged by Darshini Stark on Dec 18, 2024. A prominent orange button labeled '+ Order' is highlighted with a red circle, indicating the step to add a new order. To the right, a sidebar shows options for adding different types of pre-authorization orders: Travel Pre-Authorization, Travel Reimbursement, and Other Pre-Authorization.

darshinistark@uw.edu

12/18/2024 by Darshini Stark

Food purchase

Show Edit

Food Policy acknowledged by Darshini Stark on Wed, Dec 18, 2024 at 2:34 PM.

Business Purpose
Example business purpose should be clear, concise, and explain the benefit to the budget

Attachments

Open OneDrive Folder

OneDrive Folder

Project Folder Name

TREQ011996

+ Order Project is Open

Add Order to this project:

Pre-Auth: Example Event TREQ

Travel Pre-Authorization

Travel Reimbursement

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).

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.

Travel Pre-Authorization

Travel Reimbursement

Other Pre-Authorization

Other Reimbursement

Make a Purchase

Pay an Invoice

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

+ Food

Meal Type *

Event Date *

mm/dd/yyyy

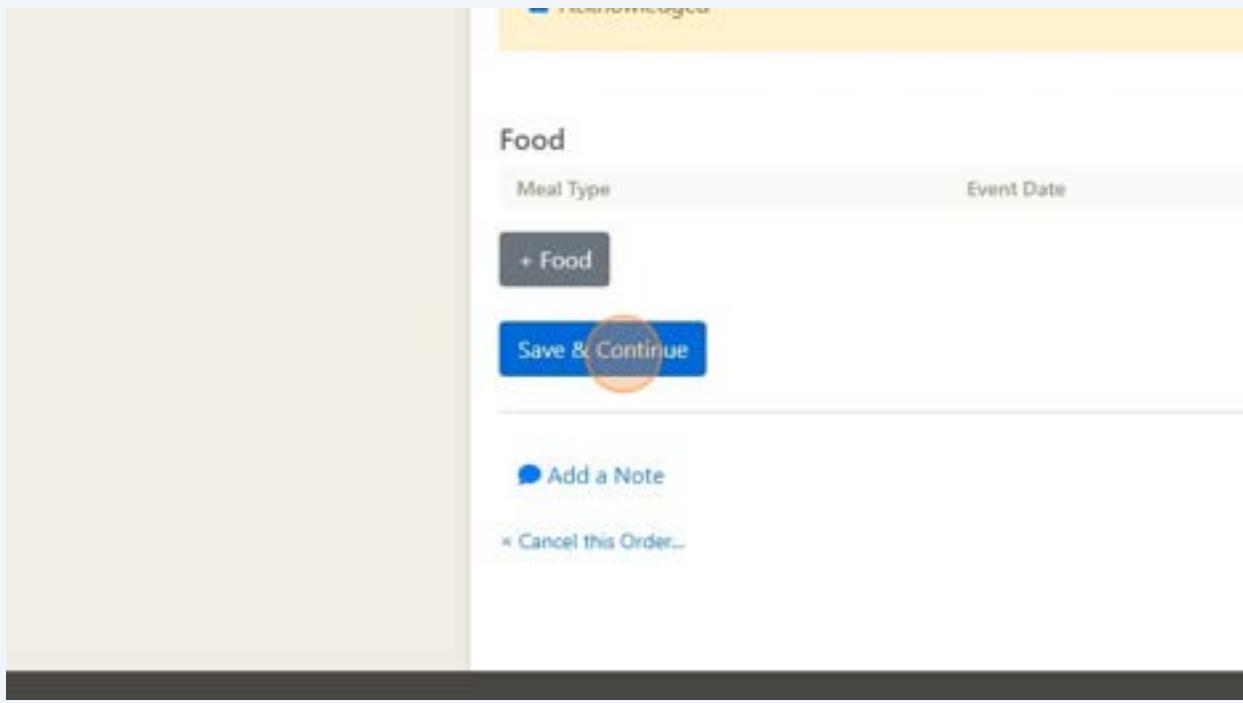
Save Delete Cancel

Save & Continue

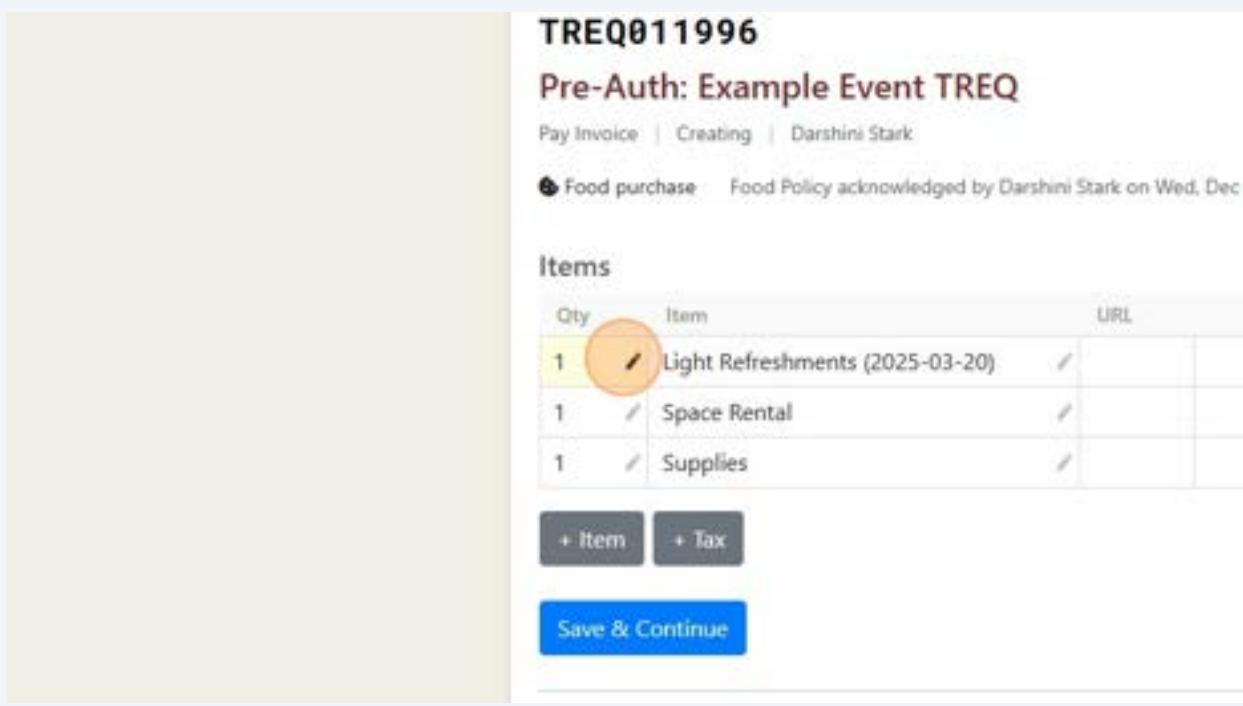
Add a Note

Cancel this Order...

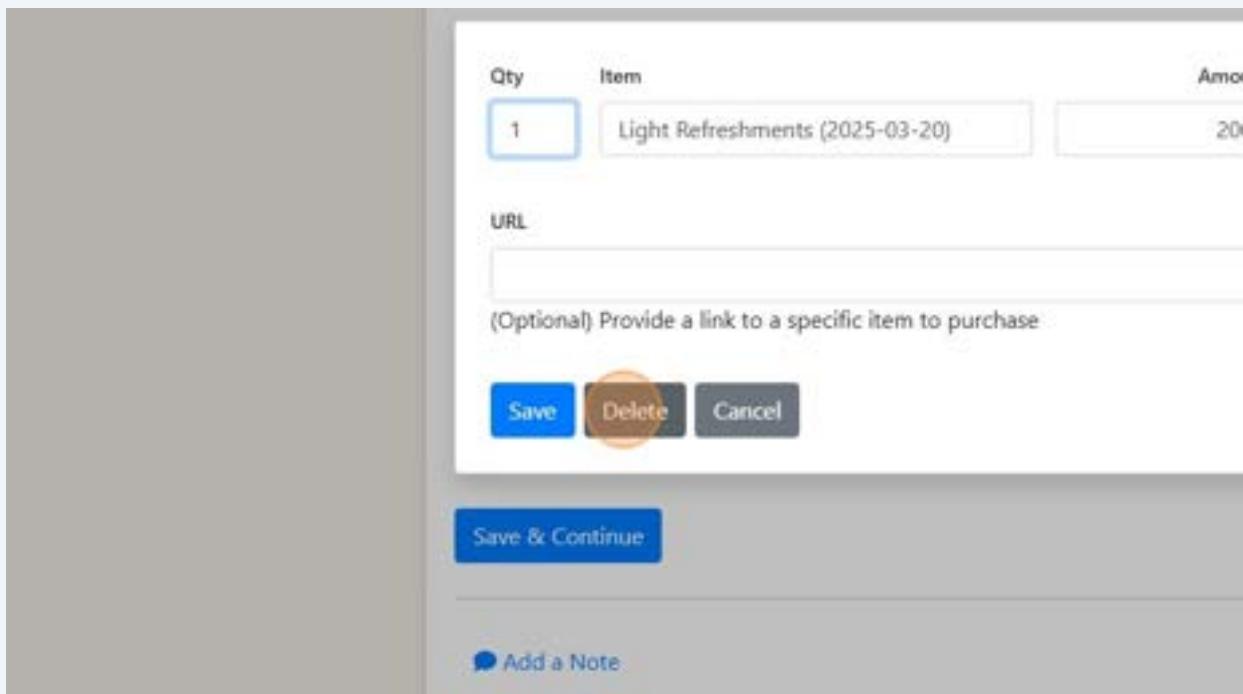
5 Click "Save & Continue"



6 It will auto popualte 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.

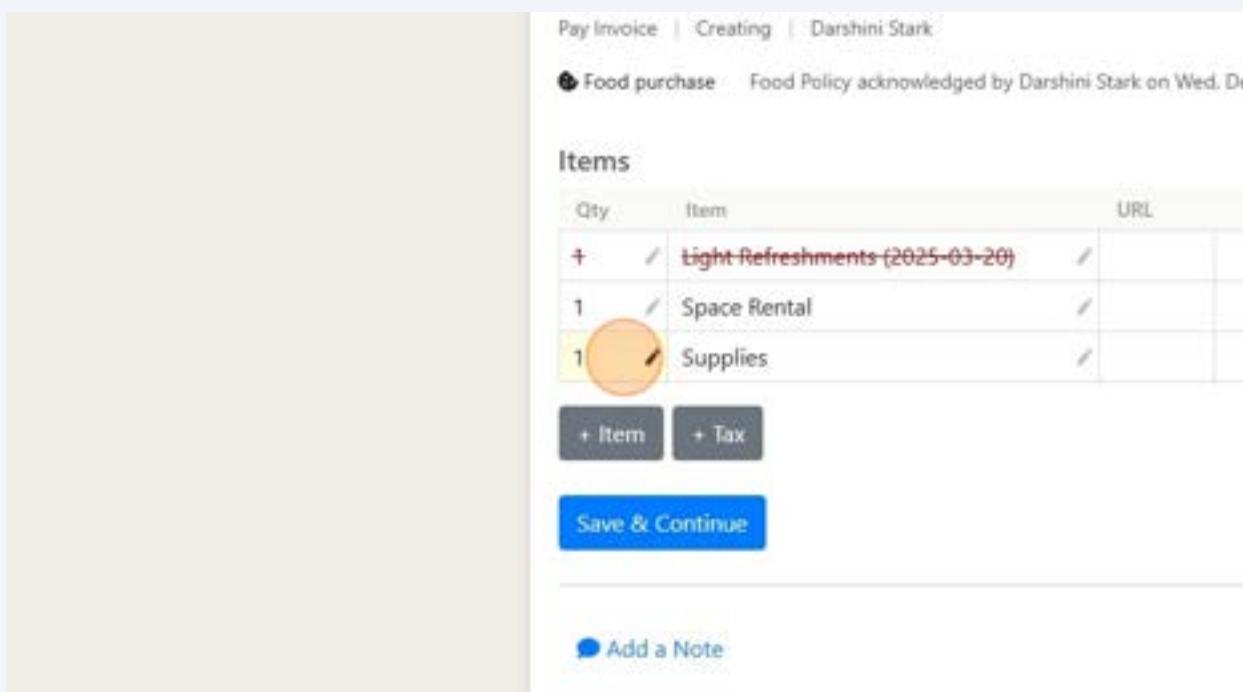


7 Open the line item you wish to delete, then press "Delete".



A screenshot of a line item deletion dialog box. The dialog shows a table with one row. The first column is 'Qty' with value '1', the second column is 'Item' with value 'Light Refreshments (2025-03-20)', and the third column is 'Amor' with value '20'. Below the table is a 'URL' input field with a placeholder '(Optional) Provide a link to a specific item to purchase'. At the bottom are three buttons: 'Save' (blue), 'Delete' (orange, highlighted with a circular selection), and 'Cancel'.

8 Repeat!



A screenshot of a list of items in a table. The table has three columns: 'Qty', 'Item', and 'URL'. There are three rows: 1. Qty: +, Item: Light Refreshments (2025-03-20), URL: / (highlighted with a circular selection). 2. Qty: 1, Item: Space Rental, URL: / (highlighted with a circular selection). 3. Qty: 1, Item: Supplies, URL: / (highlighted with a circular selection). Below the table are buttons '+ Item' and '+ Tax'. At the bottom are 'Save & Continue' and 'Add a Note' buttons.

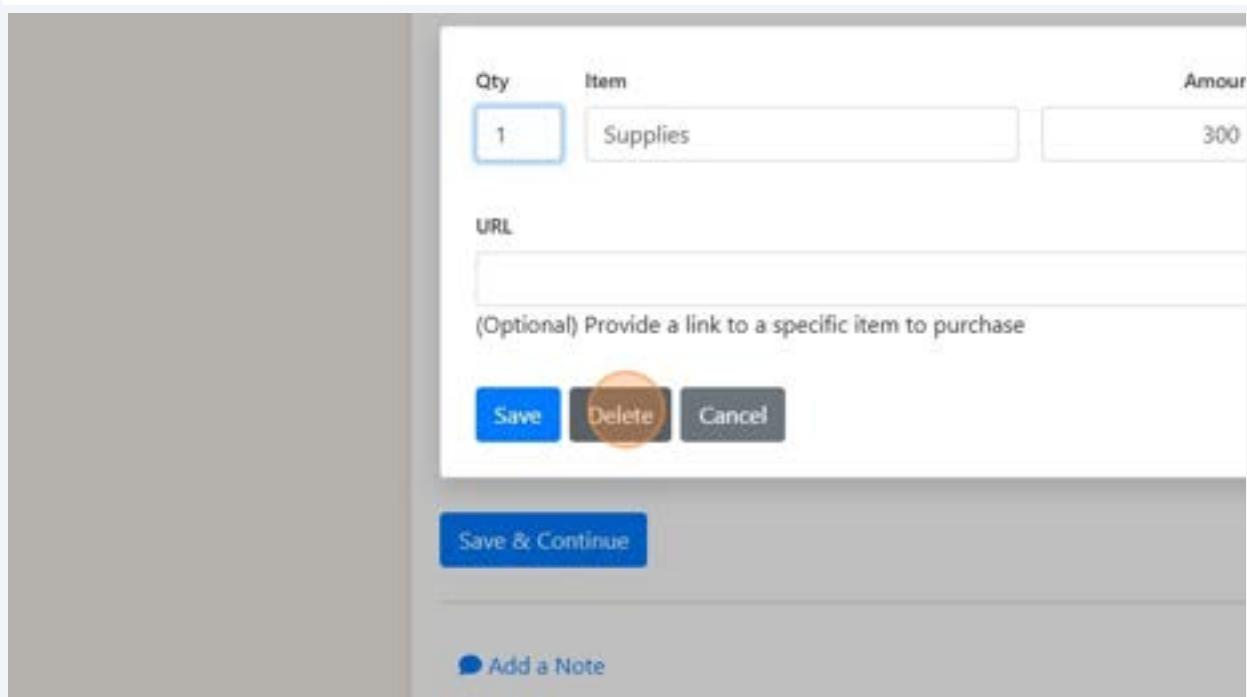
Qty	Item	Amount
1	Supplies	300

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

Save **Delete** **Cancel**

Save & Continue

Add a Note



9 Click "Save & Continue"

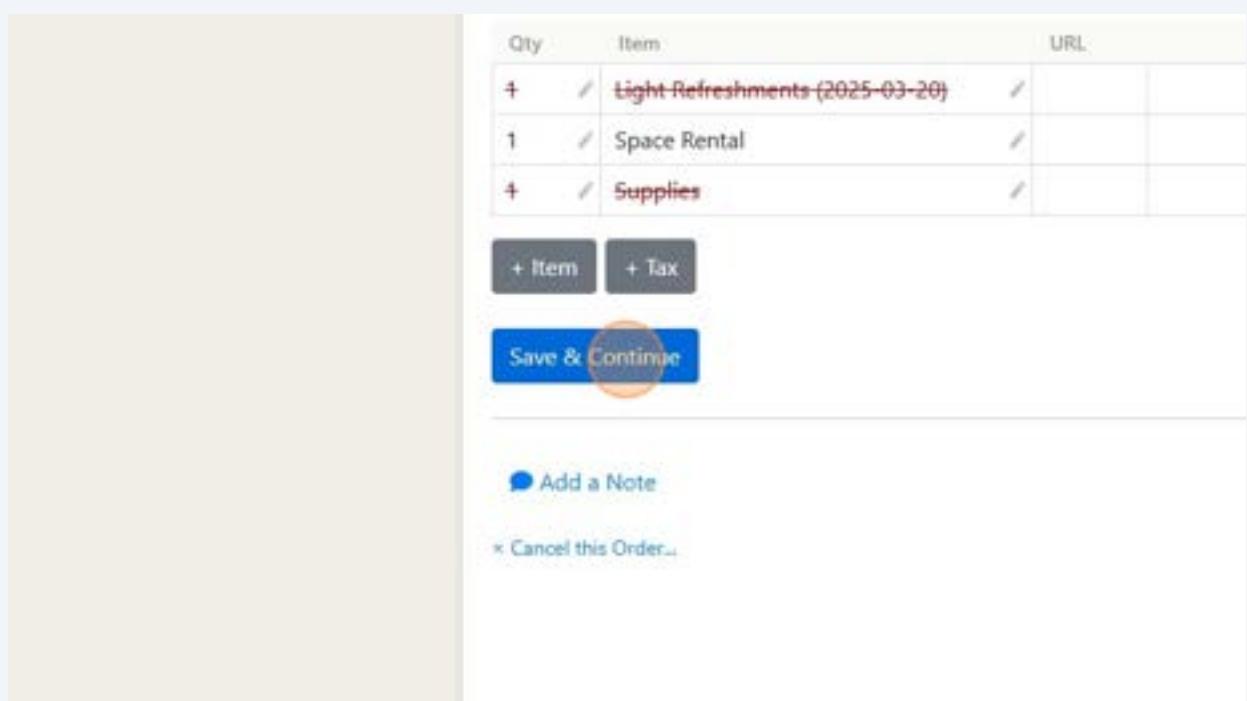
Qty	Item	URL
4	Light Refreshments (2025-03-20)	/
1	Space Rental	/
4	Supplies	/

+ Item **+ Tax**

Save & Continue

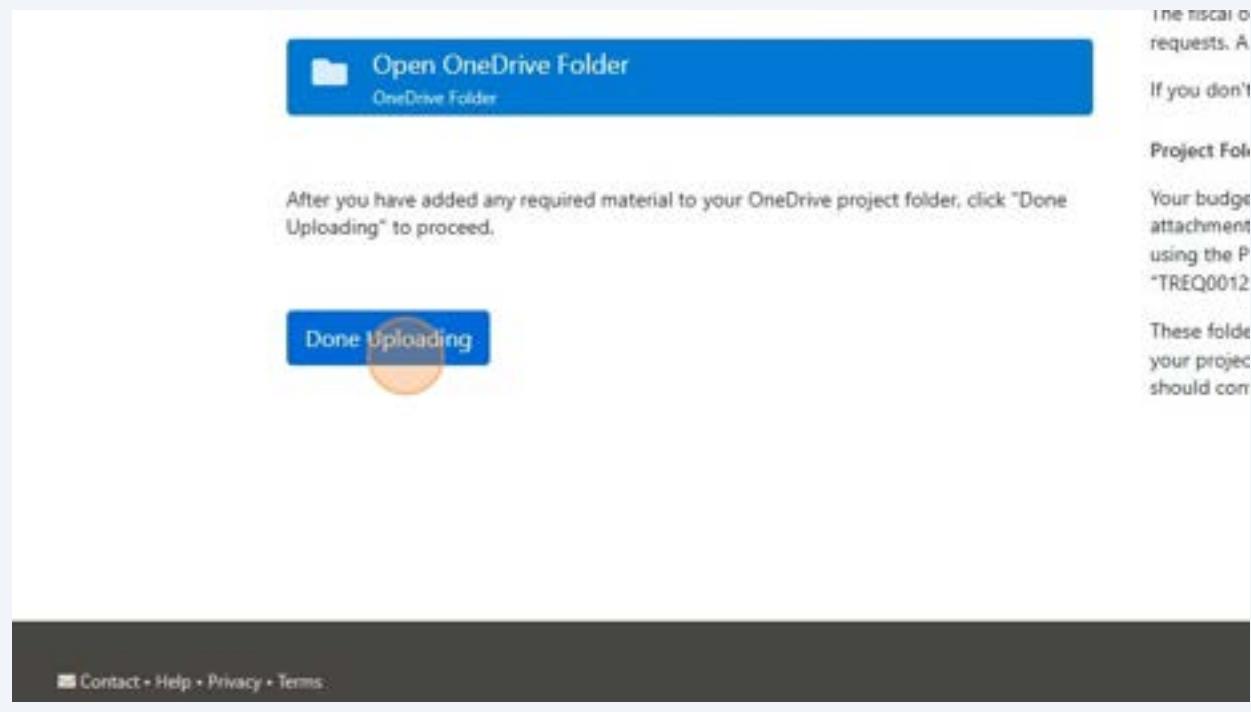
Add a Note

Cancel this Order...



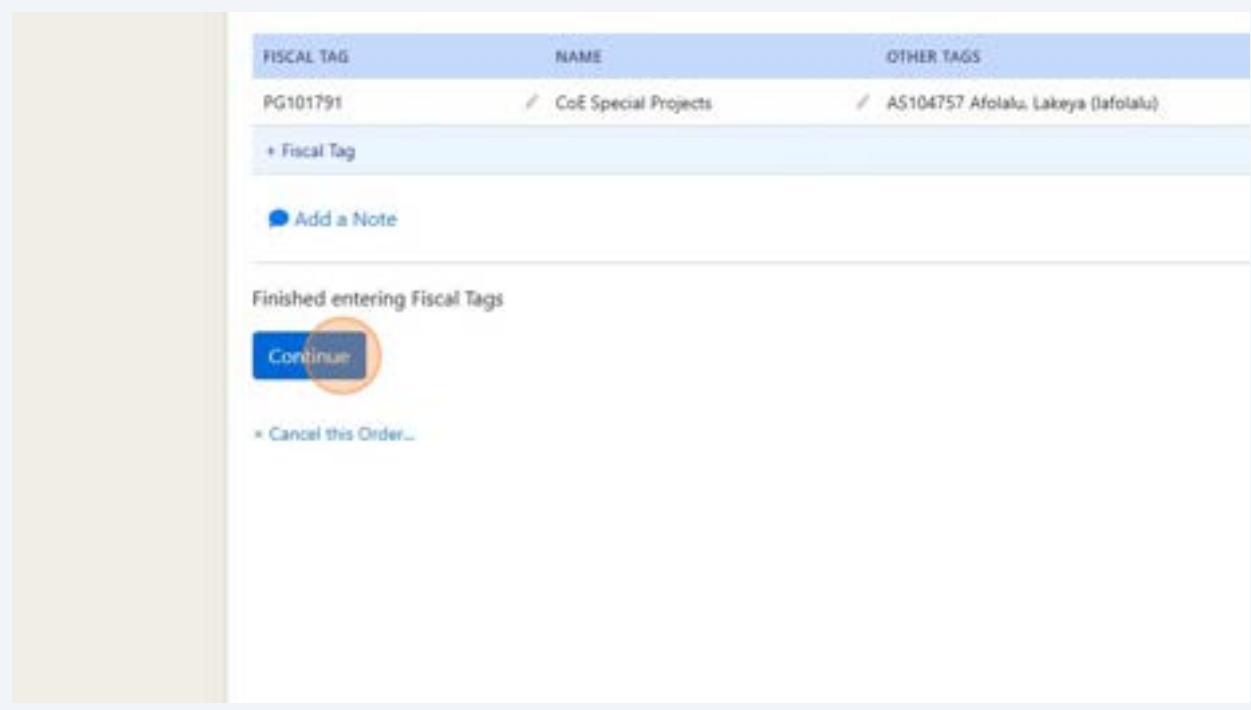
10

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"!

The screenshot shows the UW Procurement System interface. At the top, there are navigation links for 'Best Service', 'What does this mean?', and a search bar. The main content area is titled 'Fiscal Tags' and shows a table with one row:

TAG	Amount	Original Total	Unit
P2301781	Cell Special Projects	AJ104737 Ahola, Lakayra (Informed)	

Below the table, there is a section titled 'Send Order to Fiscal' with a note: 'This project includes a Pre-Authorization which has Department Approval. That step is complete. After reviewing and verifying your order, send to Fiscal for handling.' A 'Department Pre-Audit' box shows the following history:

- Wed, 10/10/2014, 2:36 PM: Denshi Stark requested approval from Santi Perumal. Department Approval was provided on pre-authorization for this project.
- Wed, 10/10/2014, 2:39 PM: Approved by Denshi Stark, on behalf of Santi Perumal.

At the bottom of the page, there is a 'Submit' button and a link to 'Cancel this Order'.