

TREQ: Event or Multi-Order Request

This guide walks you through how to submit a TREQ request for an event or multi-order situation.



To keep events and other complex orders organized, always start with a Pre-Authorization that shows the total estimated amount. As invoices come in, purchases need to made, or reimbursements processed, revisit the Pre-Authorization and add orders as needed.

Submitting the Pre-Authorization

1

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

13 projects associated with inactive users' OneDrives

Needs Action 13				
Creating 1				
My Orders 17				
My Trips 7				
On Call 6				
Pending 277				
Needs Action 13 Orders				
These orders need your review, approval, or a task completed.				
PROJECT #	SUBMITTED	TITLE	LAST ACTION	STAGE
TREQ012441	4/8/2024 Claire Kamienski	RVC/SPEB Community Café Training & Participation Pay Invoice	Enter in Workday Tony Le 4/15/2025	Follow Up Darshini Stark
TREQ014448	8/26/2024 David Knight	Invoice: Knight - research assistance from external consultant, Shin Pay Invoice	Fiscal Approval GR049910 Kaitlyn Li 8/27/2024	Enter in Workday Darshini Stark
TREQ014972	10/2/2024 Kristen Missall	Time2Track Sales Tax Invoices Pay Invoice	Fiscal Approval PG104026 Serianna Bock 10/3/2024	Enter in Workday Darshini Stark
TREQ016432	1/22/2025 Laura-Beth Straight	Honorarium for Dr. Muhammad Khalifa Purchase	Fiscal Approval GF117028 Darshini Stark 1/28/2025	Place Order Darshini Stark
TREQ016914	2/21/2025 Laura-Beth Straight	Banks Center Sponsorship of Dr. Margo Okazawa-Rey Lecture Purchase	Fiscal Approval GF117028 Darshini Stark 4/14/2025	Place Order Darshini Stark
TREQ017911	4/29/2025 Paul Metellus	BI Operations: Student Support - Brayden Jackson Purchase	Enter into SDB Brenda Rubio 5/5/2025	Place Order Darshini Stark

2 Click "Other Pre-Authorization"

The screenshot shows the TREQ 'Travel & Requisitions' dashboard. At the top, there's a navigation bar with a menu icon, 'TREQ', a 'Test Server' button, a search bar, and a 'W' logo. Below the navigation bar, the 'Travel & Requisitions' section is displayed. It contains six buttons: 'Travel Pre-Authorization', 'Other Pre-Authorization' (highlighted with an orange circle), 'Make a Purchase', 'Travel Reimbursement', 'Other Reimbursement', and 'Pay an Invoice'. Below these buttons, there's a status bar with counts for 'Needs Action' (13), 'Creating' (1), 'My Orders' (17), 'My Trips' (7), 'On Call' (6), and 'Pending' (277). A yellow banner indicates '13 projects associated with inactive users: OneDrives'. Below this, a section titled 'Needs Action' (13 Orders) shows a table of orders needing review.

PROJECT #	SUBMITTED	TITLE	LAST ACTION	STAGE
TREQ012441	4/8/2024 Claire Kamienski	RVC/SPEB Community Café Training & Participation Pay Invoice	Enter in Workday Tony Le 4/15/2025	Follow Up Darshini Stark
TREQ014448	8/26/2024	Invoice: Knight - research assistance from	Fiscal Approval GR049910	Enter in Workday

3 Update the "Project Title" field. Include helpful identifying words for later searches.

The screenshot shows the 'Create New Order' form for 'Pre-Authorization'. The form is divided into two main sections: the left side for form input and the right side for help text. The 'Project Title' field is highlighted with an orange circle. The form includes fields for 'Project Title', 'Project Owner', and 'Business Purpose'. There are also radio button options for 'Food' and 'Research Subject Payments'. A 'Save & Continue' button is at the bottom left. The right side contains 'Help: Create a Project' text, which explains the purpose of the project fields and provides examples for each.

Project Title

Pre-Auth: Stark

Project Owner

Darshini Stark

Business Purpose

Food

☒ No food
☐ Food will be purchased as part of this project

Research Subject Payments

☒ No research subject payments
☐ Gift card research subject payments
☐ Revolving fund check research subject payments

Save & Continue

Help: Create a Project

Project fields describe the work being done for the college and/or university.

Project Title

Brief description of the work being done for the college. Title will show up in lists and emails generated by TREQ. For example:

- Travel to AERA
- Recruiting Event
- Smith / NSF Research
- Training Seminar, Professional Development

Project Owner

Generally this is you. If you are entering an order on behalf of someone else and they are the one who should be contacted with questions, change this to another COE person.

Business Purpose

UW defines business purpose as: "Explanation of how the purchase or payment is used for UW business." In addition, all expenditures on grants are required to have an additional statement on the expenditure's benefit to grant. For example:

- Purchase of SOMETHING for use in the PROGRAM_NAME program.
- Purchase of books for use in PROGRAM_NAME program
- Purchase of food for in-person new student orientation on EVENT_DATE.
- Transcription services for interviews performed on WORK_DATE for NAME_OF_GRANT research project
- To attend and present paper at AERA Annual Conference

4

Update the business purpose. It should be short and concise, but explain how it benefits the college.

If food is being purchased, be sure to press the "Food will be purchased as part of this project" button.

Student Orientation XYZ Program - FY26

Project Owner
Darshini Stark

Business Purpose
New student orientation for XYZ Program. We will be covering basic information, doing a meet and greet, and providing lunch. A guest speaker will join for lunch.

Food
☒ No food
☐ Food will be purchased as part of this project

Research Subject Payments
☒ No research subject payments
☐ Gift card research subject payments
☐ Revolving fund check research subject payments

Save & Continue

Project Title
Brief description of the work being done for the college. Title will show up in lists and emails generated by TREQ. For example:

- Travel to AERA
- Recruiting Event
- Smith / NSF Research
- Training Seminar, Professional Development

Project Owner
Generally this is you. If you are entering an order on behalf of someone else and they are the one who should be contacted with questions, change this to another COE person.

Business Purpose
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- Purchase of SOMETHING for use in the PROGRAM_NAME program.
- Purchase of books for use in PROGRAM_NAME program
- Purchase of food for in-person new student orientation on EVENT_DATE.
- Transcription services for interviews performed on WORK_DATE for NAME_OF_GRANT research project
- To attend and present paper at AERA Annual Conference

5

Click "Save & Continue"

New student orientation for XYZ Program. We will be covering basic information, doing a meet and greet, and providing lunch. A guest speaker will join for lunch.

Food
☐ No food
☒ Food will be purchased as part of this project

Research Subject Payments
☒ No research subject payments
☐ Gift card research subject payments
☐ Revolving fund check research subject payments

Save & Continue

Project Owner
Generally this is you. If you are entering an order on behalf of someone else and they are the one who should be contacted with questions, change this to another COE person.

Business Purpose
UW defines business purpose as: "Explanation of how the purchase or payment is used for UW business." In addition, all expenditures on grants are required to have an additional statement on the expenditure's benefit to grant. For example:

- Purchase of SOMETHING for use in the PROGRAM_NAME program.
- Purchase of books for use in PROGRAM_NAME program
- Purchase of food for in-person new student orientation on EVENT_DATE.
- Transcription services for interviews performed on WORK_DATE for NAME_OF_GRANT research project
- To attend and present paper at AERA Annual Conference



Per Diem: Most food purchases are subject to per diem. The rates per meal change annually and updated rates can be found on the [UW Travel website](#).

6

Click the "Acknowledged" field after reviewing the Food per diem acknowledgement.

Pre-Authorization | Creating | Darshini Stark

Food purchase

Food per diem acknowledgement:

Meals must follow allowed per diem rates based on the meeting location. The per diem amount includes the cost of the food plus tax, tip and delivery fees.

When requesting and purchasing food, an agenda and attendee list must be included. If this is prior to the event, an invitee list is allowable documentation.

University and Washington State policies allow for the purchase of meals and light refreshments for employees, students and official guests under certain criteria to include the source of funds, type of budget and purpose of the event. Follow this link for more information: <https://finance.uw.edu/food-approval>

☐ Acknowledged

[Add a Note](#)

[Cancel this Order...](#)

7 Choose the meal type

budget and purpose of the event. Follow this link for more information: <https://finance.uw.edu/food-approval>

☒ Acknowledged

Food

Meal Type	Event Date	# Participants
<div>+ Food</div>		
<div>Meal Type *</div> <div>Lunch</div>	<div>Event Date *</div> <div>mm/dd/yyyy</div>	<div># Participants *</div> <div></div>
<div>Save Delete Cancel</div>		
<div>Save & Continue</div>		
<div>Add a Note</div>		
<div>Cancel this Order...</div>		

8 Choose the event date

employees, students and official guests under certain criteria to include the source of funds, type of budget and purpose of the event. Follow this link for more information: <https://finance.uw.edu/food-approval>

☒ Acknowledged

Food

Meal Type	Event Date	# Participants
<div>+ Food</div>		
<div>Meal Type *</div> <div>Lunch</div>	<div>Event Date *</div> <div>mm/dd/yyyy</div>	<div># Participants *</div> <div></div>
<div>Save Delete Cancel</div>		
<div>Save & Continue</div>		
<div>Add a Note</div>		
<div>Cancel this Order...</div>		

9 Update the # of Participants

budget and purpose of the event. Follow this link for more information: <https://finance.uw.edu/food-approval>

☒ Acknowledged

Food

Meal Type Event Date # Participants

+ Food

Meal Type * Event Date * # Participants *

Lunch 09/22/2025

Save Delete Cancel

Save & Continue

Add a Note

Cancel this Order...

10 Click "Save"

Food

Meal Type Event Date # Participants

+ Food

Meal Type * Event Date * # Participants *

Lunch 09/22/2025 45

Save Delete Cancel

Save & Continue

Add a Note

Cancel this Order...

Contact • Help • Privacy • Terms

11 Click "Save & Continue"

employees, students and official guests under certain criteria to include the source of funds, type of budget and purpose of the event. Follow this link for more information: <https://finance.uw.edu/food-approval>

☒ Acknowledged

Food

Meal Type	Event Date	# Participants
Lunch	9/22/2025	45

+ Food

Save & Continue

Add a Note

× Cancel this Order...

12 To add other anticipated expenses to the order, press "+ Item"

TREQ

Test Server
What does this mean?

Search

W

TREQ018041

Student Orientation XYZ Program - FY26

Pre-authorization | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		0.00	0.00

+ Item + Tax

Save & Continue

Add a Note

× Cancel this Order...

13 Update "Item" field with the expense

Student Orientation XYZ Program - FY26
Pre-Authorization | Creating | Darshini Stark
Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		0.00	0.00

+ Item + Tax

Qty Item Amount Line Total

1 0.00

URL

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

Save Delete Cancel

Save & Continue

14 Update the "Amount" field.

Student Orientation XYZ Program - FY26
Pre-Authorization | Creating | Darshini Stark
Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		0.00	0.00

+ Item + Tax

Qty Item Amount Line Total

1 Supplies 0.00

URL

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

Save Delete Cancel

Save & Continue

Add a Note

15 Click "Save"

1 Lunch (2025-09-22) 0.00 0.00

+ Item + Tax

Qty	Item	Amount	Line Total
1	Supplies	100	0.00

URL

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

Save Delete Cancel

Save & Continue

Add a Note

Cancel this Order...

16 Be sure to include the per diem rate or the meal cap for the event.

TREQ018041

Student Orientation XYZ Program - FY26

Pre-Authorization | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		0.00	0.00
1	Supplies		100.00	\$100.00

+ Item + Tax

Qty	Item	Amount	Line Total
1	Lunch (2025-09-22)		0.00

URL

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

Save Delete Cancel

17 In the "Amount" field, update it to the cost per person.

Pre-Authorization | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		0.00	0.00
1	Supplies		100.00	\$100.00

+ Item + Tax

Qty Item Amount Line Total

1 Lunch (2025-09-22) 0.00 0.00

URL

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

Save Delete Cancel

Save & Continue

Add a Note

18 In the "Qty" field, update it to the amount of people

Pre-Authorization | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		0.00	0.00
1	Supplies		100.00	\$100.00

+ Item + Tax

Qty Item Amount Line Total

1 Lunch (2025-09-22) 26.68 0.00

URL

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

Save Delete Cancel

Save & Continue

Add a Note

19 Click "Save"

Supplies 100.00 \$100.00

+ Item + Tax

Qty	Item	Amount	Line Total
45	Lunch (2025-09-22)	26.68	\$1,200.60

URL

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

Save Delete Cancel

Save & Continue

Add a Note

Cancel this Order...

20 Click "Save & Continue"

Student Orientation XYZ Program - FY26

Pre-Authorization | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
45	Lunch (2025-09-22)		26.68	\$1,200.60
1	Supplies		100.00	\$100.00

+ Item + Tax

Save & Continue

Add a Note

Cancel this Order...

21

Now it's time to make the corresponding TREQ folder. Click the grey "Copy" button.

TREQ018041
Student Orientation XYZ Program - FY26
 Pre-Authorization | Creating | Darshini Stark

Food purchase

Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Upload Attachments
 Create folder in OneDrive named
 TREQ018041 Copy

Open OneDrive Folder
 OneDrive Folder

After you have added any required material to your OneDrive project folder, click "Done Uploading" to proceed.

Done Uploading

Help: Attachments
 Frequently supplemental files are needed to process requests in TREQ. For example:

- Receipts scanned as PDF files
- Signed Food Policy documents
- Conference agendas
- Invoice to be paid

OneDrive
 To make managing files easier for you and the fiscal team we are storing files related to TREQ in a OneDrive file share. This gives you drag-and-drop file management, ability to preview files online, and to share files with your team.

The fiscal office will designate a specific OneDrive folder you should use for your TREQ requests. A link will be provided to that folder within your TREQ Projects and Orders.

If you don't have a TREQ OneDrive folder yet, contact your budget manager to get set up.

Project Folder Name
 Your budget manager will give you instructions for how to organize your TREQ attachments in OneDrive. Generally they want you to create a folder per TREQ project, using the Project Number as the folder name. TREQ Project Numbers look like "TREQ001234".

These folder names are just suggestions. It is up to you to create the folder in OneDrive. If your project has its own organization, understood by your fiscal budget manager, you should continue to use that.

22

Click "Open OneDrive Folder"

Student Orientation XYZ Program - FY26
 Pre-Authorization | Creating | Darshini Stark

Food purchase

Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Upload Attachments
 Create folder in OneDrive named
 TREQ018041 Copy

Open OneDrive Folder
 OneDrive Folder

After you have added any required material to your OneDrive project folder click "Done Uploading" to proceed.

Done Uploading

Help: Attachments
 Frequently supplemental files are needed to process requests in TREQ. For example:

- Receipts scanned as PDF files
- Signed Food Policy documents
- Conference agendas
- Invoice to be paid

OneDrive
 To make managing files easier for you and the fiscal team we are storing files related to TREQ in a OneDrive file share. This gives you drag-and-drop file management ability to preview files online, and to share files with your team.

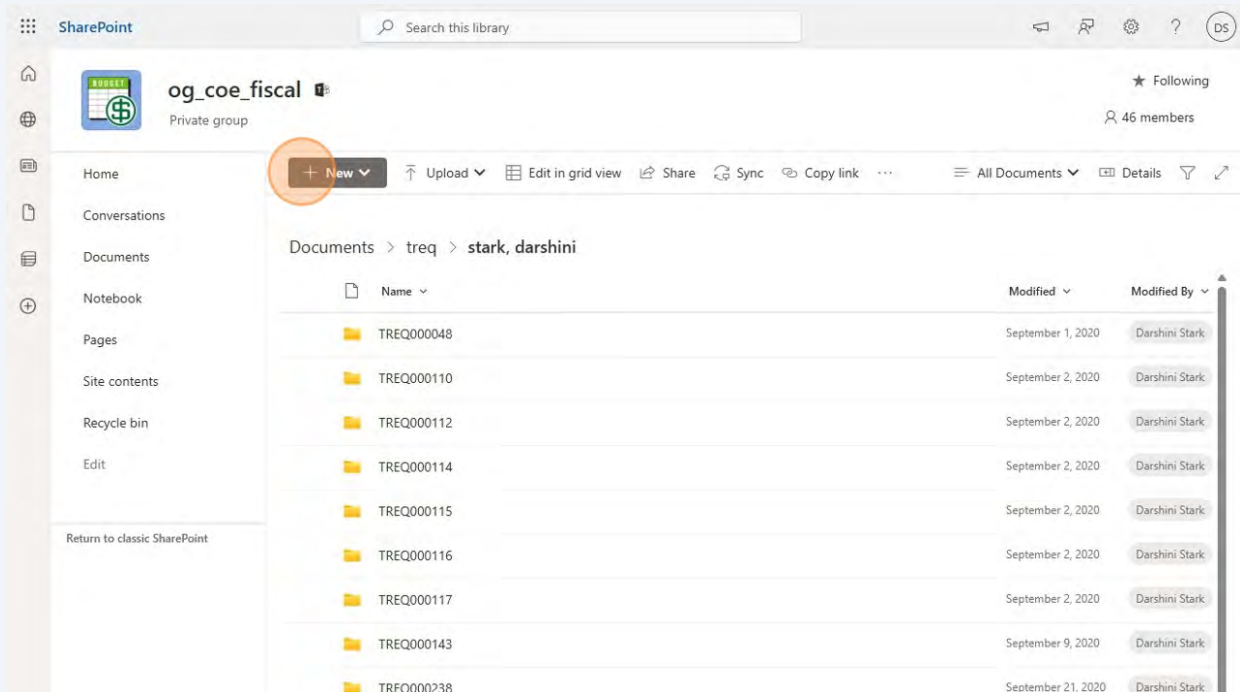
The fiscal office will designate a specific OneDrive folder you should use for your TREQ requests. A link will be provided to that folder within your TREQ Projects and Orders.

If you don't have a TREQ OneDrive folder yet, contact your budget manager to get set up.

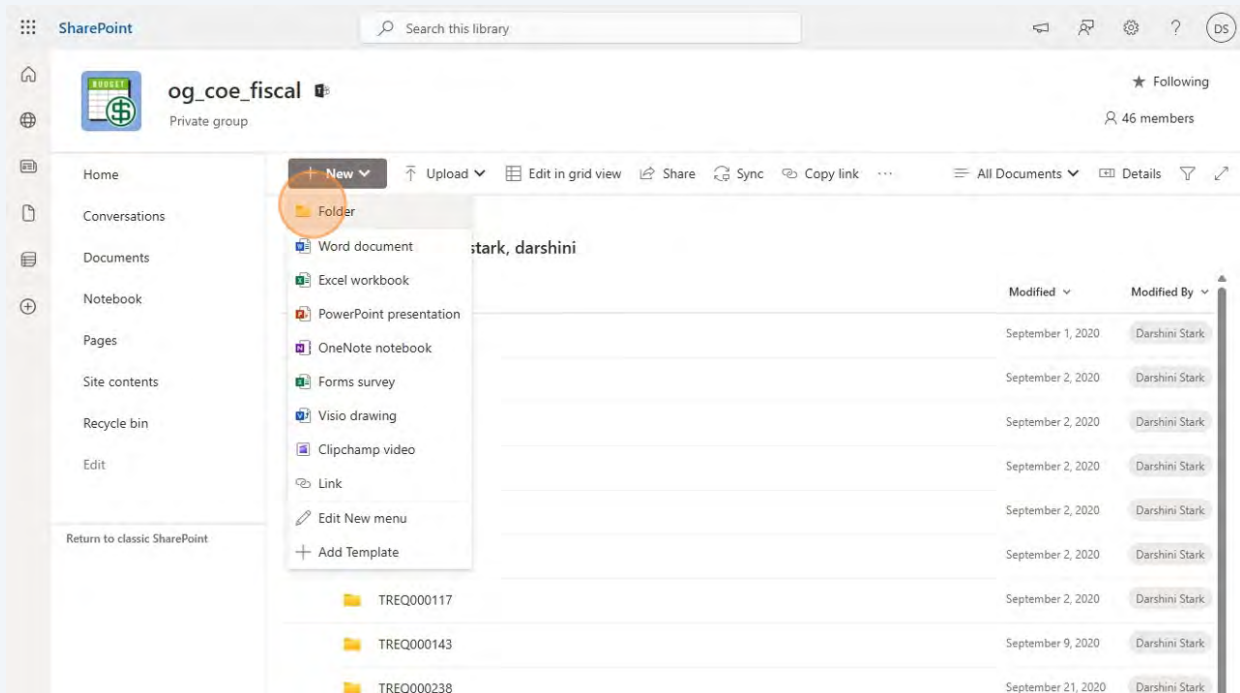
Project Folder Name
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These folder names are just suggestions. It is up to you to create the folder in OneDrive. If your project has its own organization understood by your fiscal budget manager, you should continue to use that.

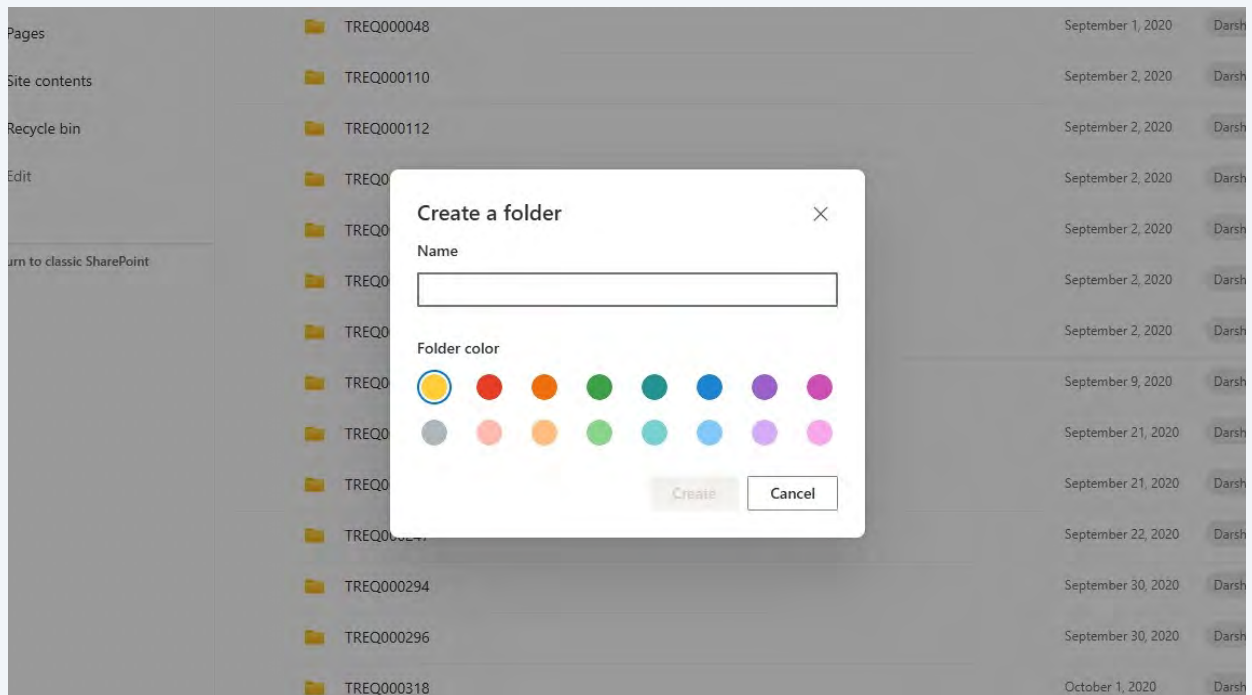
23 It will open a new window into SharePoint. Click "New"



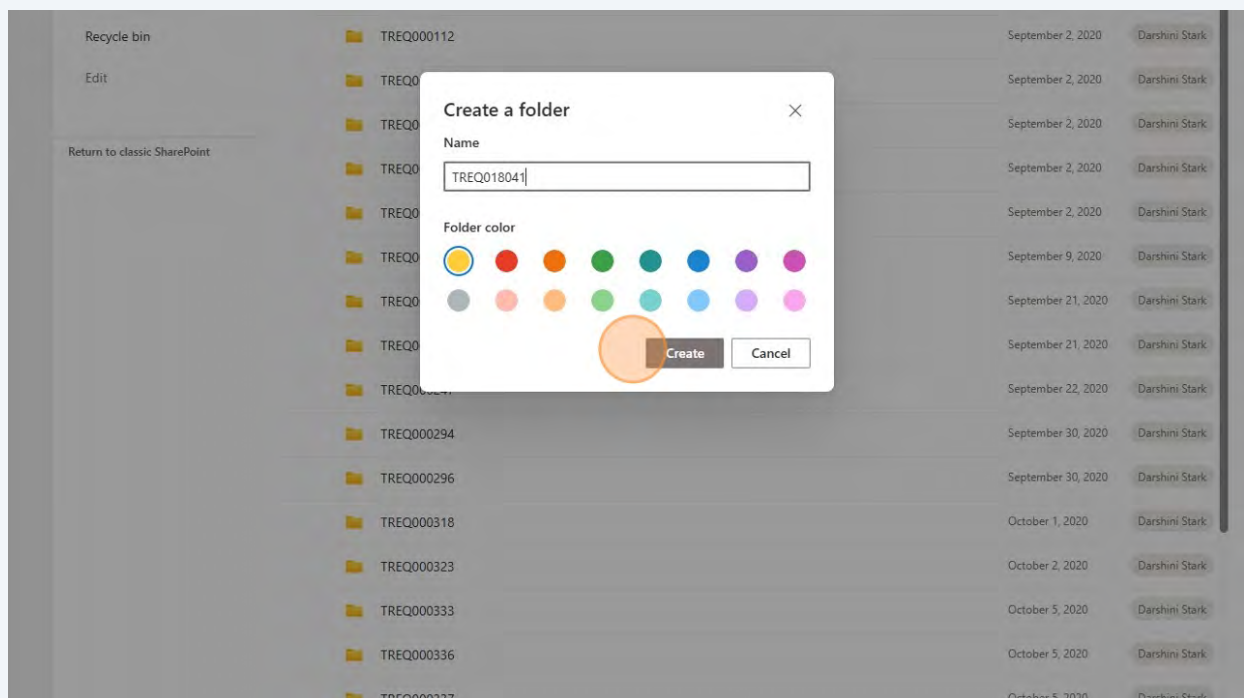
24 Click "Folder"



25 Paste the TREQ number you previously copied in the "Name" box

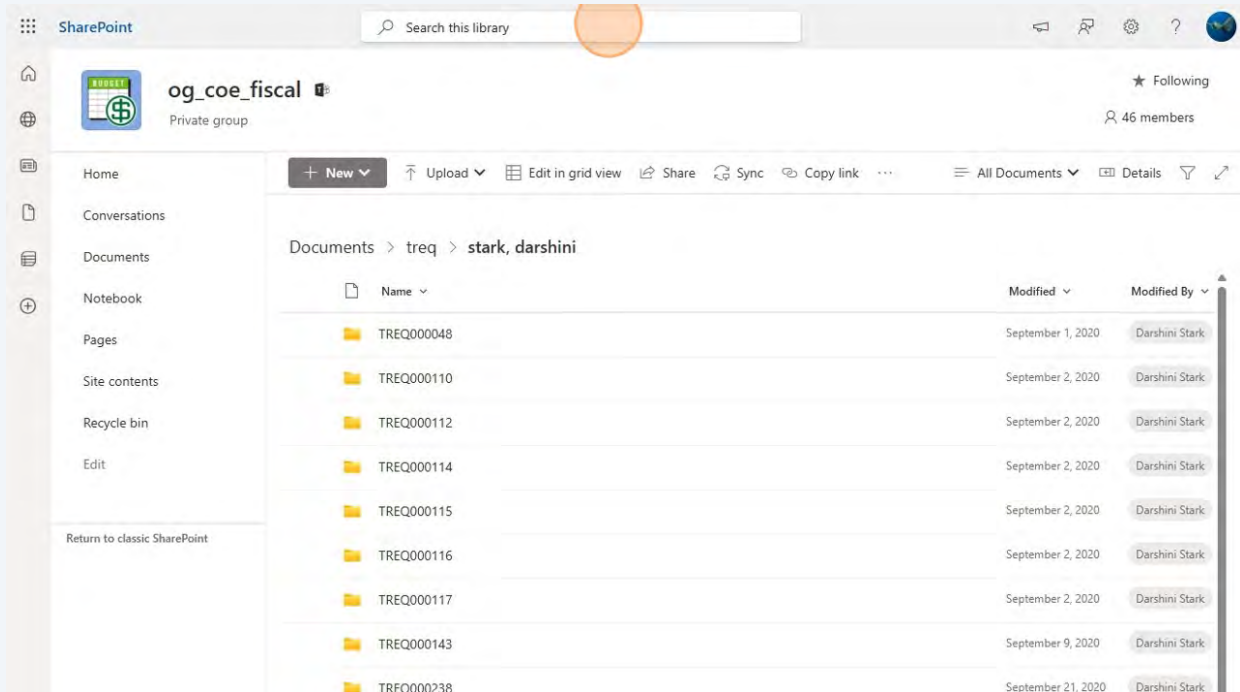


26 Then press "Create"



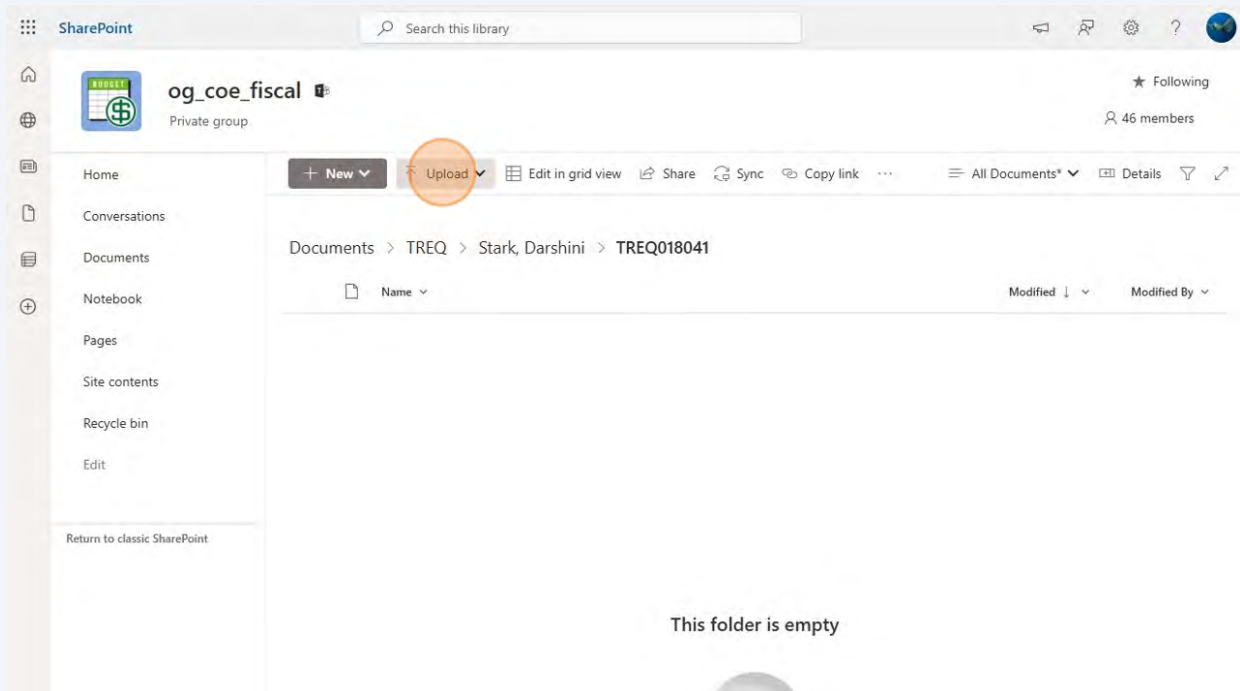
27

You can search for your newly created folder using the search bar. Open the folder.

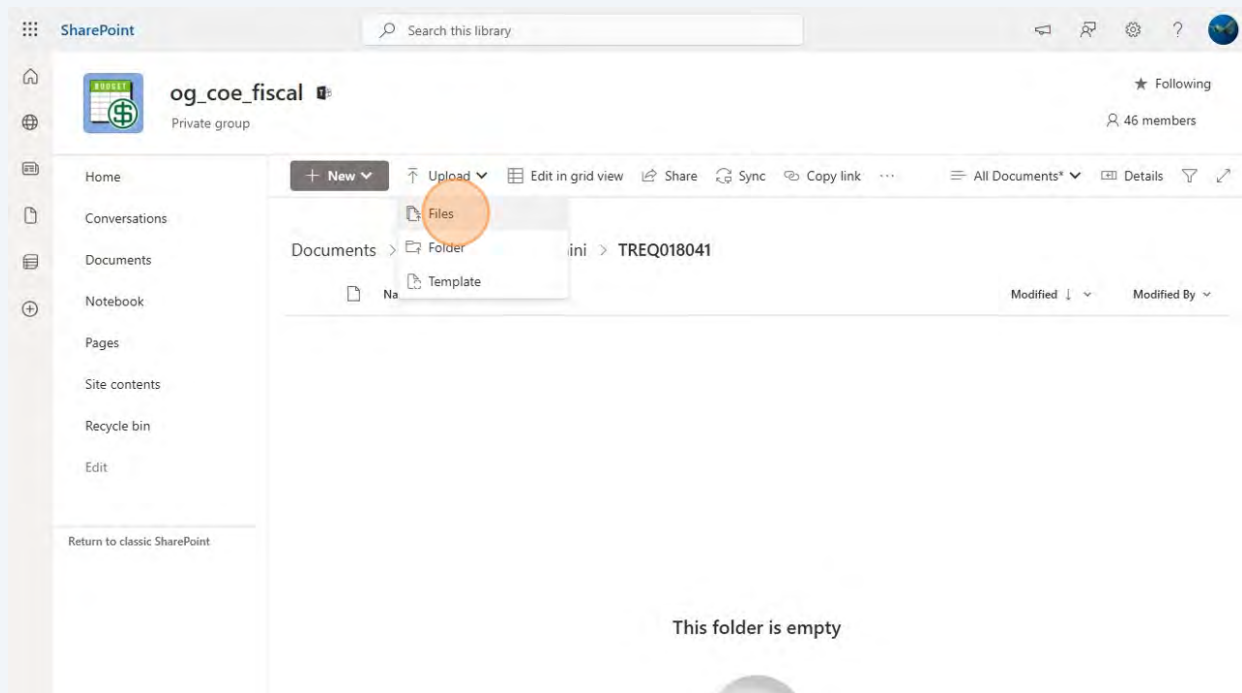


28

Click "Upload"



29 Click "Files" and upload any important supporting documentation



For guidelines on what supporting documentation is needed for each type of purchase, visit our [website](#) or email edfiscal@uw.edu.

30 Click "Done Uploading"

Upload Attachments

Create folder in OneDrive named

TREQ018041

Copy

Open OneDrive Folder
OneDrive Folder

After you have added any required material to your OneDrive project folder, click "Done Uploading" to proceed.

Done Uploading

OneDrive

To make managing files easier for you and the fiscal team we are storing files related to TREQ in a OneDrive file share. This gives you drag-and-drop file management, ability to preview files online, and to share files with your team.

The fiscal office will designate a specific OneDrive folder you should use for your TREQ requests. A link will be provided to that folder within your TREQ Projects and Orders.

If you don't have a TREQ OneDrive folder yet, contact your budget manager to get set up.

Project Folder Name

Your budget manager will give you instructions for how to organize your TREQ attachments in OneDrive. Generally they want you to create a folder per TREQ project, using the Project Number as the folder name. TREQ Project Numbers look like "TREQ001234".

These folder names are just suggestions. It is up to you to create the folder in OneDrive. If your project has its own organization, understood by your fiscal budget manager, you should continue to use that.

31 Type in your Fiscal Tag

TREQ018041

Student Orientation XYZ Program - FY26

Pre-Authorization | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS	SPLIT
------------	------	------------	-------

+ Fiscal Tag

Fiscal Tag	Name	Split	Split Type
XXXX00000	Office of Student Service Operations		* Remainder
Activity Tag	Assignee Tag		
AC000000	AS000000		

Search by employee name or worktag number

Fiscal Tag is required.

Save Cancel

Fiscal Tag

Enter a Fiscal Tag number, usually a Workday Project, Grant, or Gift Worktag. The system will suggest matching Fiscal Tags by searching for tag numbers, names, and old FIN Budget Nbrs.

32 Select it from the drop down.

The screenshot shows a web form titled 'Fiscal Tag'. It contains several input fields: 'Fiscal Tag' (with 'PG104018'), 'Name' (with 'Office of Student Service Operations'), 'Split' (an empty dropdown menu), 'Split Type' (with '* Remainder'), 'Activity Tag' (with 'AC000000'), and 'Assignee Tag' (with 'AS000000'). Below the 'Assignee Tag' field is a search prompt: 'Search by employee name or worktag number'. At the bottom left are 'Save' and 'Cancel' buttons. Below the form fields are three sections of instructional text: 'Fiscal Tag', 'Name', and 'Activity Tag'.

Fiscal Tag
Enter a Fiscal Tag number, usually a Workday Project, Grant, or Gift Worktag. The system will suggest matching Fiscal Tags by searching for tag numbers, names, and old FIN Budget Nbrs.

Name
Name or description of the Fiscal Tag. If you choose a suggestion in the Fiscal Tag field, this is filled in for you.

Activity Tag
Certain Fiscal Tags require an Activity Tag. If you know it fill it in. If you are not sure, leave it blank and the fiscal approver will add the correct coding.

Assignee Tag

33 Click "Save"

This screenshot is identical to the one above, showing the 'Fiscal Tag' form. The 'Split' dropdown menu is still open. In this version, the 'Save' button at the bottom left is highlighted with a red circle, indicating the next step in the process.

Fiscal Tag
Enter a Fiscal Tag number, usually a Workday Project, Grant, or Gift Worktag. The system will suggest matching Fiscal Tags by searching for tag numbers, names, and old FIN Budget Nbrs.

Name
Name or description of the Fiscal Tag. If you choose a suggestion in the Fiscal Tag field, this is filled in for you.

Activity Tag
Certain Fiscal Tags require an Activity Tag. If you know it fill it in. If you are not sure, leave it blank and the fiscal approver will add the correct coding.

Assignee Tag

34 Click "Continue"

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS	SPLIT
PG104018	Office of Student Service Operations		* Remainder
+ Fiscal Tag			

[Add a Note](#)

Finished entering Fiscal Tags

[Continue](#)

[Cancel this Order...](#)

35 Now it is time to review your Pre-Authorization before submitting!

Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Business Purpose
New student orientation for XYZ Program. We will be covering basic information, doing a meet and greet, and providing lunch. A guest speaker will join for lunch.

Items

[Change Items](#)

ITEM	AMOUNT
Lunch (2025-09-22) (45 x 26.68)	\$1,200.60
Supplies	\$100.00
Total	\$1,300.60

Food

[Change Food](#)

MEAL TYPE	DATE	PARTICIPANTS
Lunch	9/22/2025	45

Fiscal Tags

[Change Fiscal Tags](#)

TAG	NAME	OTHER TAGS	SPLIT
PG104018	Office of Student Service Operations		*

36 Click "Submit"

☒ Send to Department Approver
☐ Approve this Myself

Send to Department Approver
Specify who will provide the initial department approval. This will be a PI, Director, Area Chair, or Dean who has authority over project and the relevant budgets.

Department Approver
Martin Howell

Approver Note

(Optional) Add a note if this project needs additional explanation for the approver.

Submit

[× Cancel this Order...](#)

[Contact](#) • [Help](#) • [Privacy](#) • [Terms](#)
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Time to Purchase!



Once the Pre-Authorization is submitted and approved and it is time to make purchases, you can refer to this section of the scribe.

37 In the search bar, type in the TREQ number for the Pre-Authorization

The screenshot shows the top navigation bar of the TREQ system. On the left is the 'TREQ' logo. In the center is a red 'Test Server' button with the text 'What does this mean?'. To the right is a search bar with a magnifying glass icon and the word 'Search'. Below the search bar, the text 'TREQ018041' is entered into a text input field, and a 'Go' button is to its right. Below the input field, the word 'Advanced' is written in blue. The main content area is titled 'Travel & Requisitions' and contains six purple buttons: 'Travel Pre-Authorization', 'Other Pre-Authorization', 'Make a Purchase', 'Travel Reimbursement', 'Other Reimbursement', and 'Pay an Invoice'. To the right of these buttons are links for 'About TREQ' and 'Help Order Types'. At the bottom, a light blue bar displays status counts: 'Needs Action 13', 'Creating 1', 'My Orders 18', 'My Trips 7', 'On Call 6', and 'Pending 277'. Below this bar, a yellow box contains the text '13 projects associated with inactive users' OneDrives'.

38 Click "Go"

This screenshot is identical to the previous one, but with an orange circle highlighting the 'Go' button. Below the main content area, a white box is partially visible, showing a dropdown menu for 'Needs Action' with '13 Orders' and the text 'These orders need your review, approval, or a task completed.'

39 Click "Order"

The screenshot shows the TREQ system interface. At the top, there's a purple header with a menu icon, 'TREQ', a 'Test Server' warning, a search bar, and a 'W' logo. The main content area is light beige. It displays 'TREQ018041' and 'Student Orientation XYZ Program - FY26'. Below this, there's a 'Project Owner' field with 'Darshini Stark' and 'dmestark@uw.edu'. A 'Food purchase' section is highlighted with a red circle. The 'Business Purpose' section describes a new student orientation. The 'Attachments' section has a button to 'Open OneDrive Folder'. The 'Project Folder Name' is 'TREQ018041'. A 'Pre-Authorization' box shows a date and user, with 'Show' and 'Edit' links. A red circle highlights the '+ Order' button, and a 'Close Project' button is also visible.



Depending on the type of payment we need to make will determine the type of order you add to the TREQ request.

Make a Purchase --- If you'd like the finance team to purchase something

Other Reimbursement --- If a reimbursement needs processing

Pay an Invoice --- If payment to a vendor is needed

40 In this example we will do a "Make a Purchase"

The screenshot shows the 'Add Order to this project' modal for the 'Student Orientation XYZ Program - FY26'. The modal is centered on the screen. On the left, there's a sidebar with project details: 'Food purchase', 'Business Purpose' (New student orientation for XYZ Program), 'Attachments' (with an 'Open OneDrive Folder' button), and 'Project Folder Name' (TREQ018041). The modal itself has a title bar with 'SHOW' and 'EDIT' buttons. Below the title bar, there are buttons for '+ Order' and 'Close Project'. The main content area of the modal lists several options: 'Travel Pre-Authorization', 'Travel Reimbursement', 'Other Pre-Authorization', 'Other Reimbursement', 'Make a Purchase' (highlighted with an orange circle), and 'Pay an Invoice'. To the right of the modal, there's a 'Start a new project:' section with similar options. Below the modal, there's 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.'

Food purchase

Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Business Purpose
New student orientation for XYZ Program. We will be covering basic information, doing a meet and greet, and providing lunch. A guest speaker will join for lunch.

Attachments

Open OneDrive Folder
OneDrive Folder

Project Folder Name
TREQ018041

About Attachments
The fiscal team will provide you a OneDrive folder to upload your files related to this project. If you don't have a folder, or don't have access to the provided folder, contact your project's fiscal contact. [More attachment help](#)

+ Order Close Project

Add Order to this project:
Student Orientation XYZ Program - FY26

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

Start a new project:

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

If the new order is not related to the same project (it has a different owner, different business purpose, or is travel related to a different trip) start a new project.

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.

41 Click on the line item that is not being purchased at this time to remove it.

The screenshot shows the TREQ system interface for project TREQ018041, 'Student Orientation XYZ Program - FY26'. The interface has a purple header with a menu icon, 'TREQ', 'Test Server' status, a search bar, and a 'W' logo. The main content area shows the project details and a table of items. The table has columns for 'Qty', 'Item', 'URL', 'Amount', and 'Line Total'. There are two items: 'Lunch (2025-09-22)' with a quantity of 1 and amount of 26.68, and 'Supplies' with a quantity of 1 and amount of 100. The 'Supplies' row is highlighted with an orange circle. Below the table, there are buttons for '+ Item' and '+ Tax', a 'Save & Continue' button, and a section for 'Add a Note' and 'Cancel this Order...'. The 'Food purchase' status is also visible.

TREQ

Test Server
What does this mean?

Search

W

TREQ018041
Student Orientation XYZ Program - FY26

Purchase | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		26.68	\$26.68
1	Supplies		100	\$100.00

+ Item + Tax

Save & Continue

Add a Note

Cancel this Order...

42 Click "Delete"

The screenshot shows a modal window for editing a purchase order item. At the top, there are buttons for '+ Item' and '+ Tax'. Below these is a table with columns: Qty, Item, Amount, and Line Total. The first row contains the value '1' in the Qty column, 'Supplies' in the Item column, '100' in the Amount column, and '\$100.00' in the Line Total column. Below the table is a 'URL' input field with a placeholder text: '(Optional) Provide a link to a specific item to purchase'. At the bottom of the modal are three buttons: 'Save' (blue), 'Delete' (orange, highlighted with a red circle), and 'Cancel' (grey). Below the modal, there is a 'Save & Continue' button and a section for 'Add a Note' and 'Cancel this Order...'.

Qty	Item	Amount	Line Total
1	Supplies	100	\$100.00

URL

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

Save Delete Cancel

Save & Continue

Add a Note

Cancel this Order...

43 This does not remove the item from the whole TREQ, just from this particular order. Click "Save & Continue"

The screenshot shows a purchase order summary page. At the top, it says 'TREQ 10047' and 'Student Orientation XYZ Program - FY26'. Below this, it says 'Purchase | Creating | Darshini Stark'. There is a status indicator 'Food purchase' and a note 'Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.'. Below this is a table with columns: Qty, Item, URL, Amount, and Line Total. The first row contains the value '1' in the Qty column, 'Lunch (2025-09-22)' in the Item column, an empty URL, '26.68' in the Amount column, and '\$26.68' in the Line Total column. The second row contains the value '1' in the Qty column, 'Supplies' in the Item column, an empty URL, '100' in the Amount column, and '\$100.00' in the Line Total column. Below the table are buttons for '+ Item' and '+ Tax'. Below these is a 'Save & Continue' button (blue, highlighted with a red circle). Below the button is a section for 'Add a Note' and 'Cancel this Order...'.

TREQ 10047

Student Orientation XYZ Program - FY26

Purchase | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Items

Qty	Item	URL	Amount	Line Total
1	Lunch (2025-09-22)		26.68	\$26.68
1	Supplies		100	\$100.00

+ Item + Tax

Save & Continue

Add a Note

Cancel this Order...

44 Add a mailing address if applicable. Otherwise put N/A

Student Orientation XYZ Program - FY26

Purchase | Creating | Darshini Stark

Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Mailing Address

Provide a street address where this order should be mailed.

insert mailing address here or N/A

Save

[Cancel this Order...](#)

45 If you have supporting documentation at this time, upload it to the TREQ folder.

TREQ018041

Student Orientation XYZ Program - FY26

Purchase | Creating | Darshini Stark

Food purchase

Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Upload Attachments

Create folder in OneDrive named

TREQ018041

Copy

Open OneDrive Folder

OneDrive Folder

After you have added any required material to your OneDrive project folder, click "Done Uploading" to proceed.

Done Uploading

Help: Attachments

Frequently supplemental files are needed to process requests in TREQ. For example:

- Receipts scanned as PDF files
- Signed Food Policy documents
- Conference agendas
- Invoice to be paid

OneDrive

To make managing files easier for you and the fiscal team we are storing files related to TREQ in a OneDrive file share. This gives you drag-and-drop file management, ability to preview files online, and to share files with your team.

The fiscal office will designate a specific OneDrive folder you should use for your TREQ requests. A link will be provided to that folder within your TREQ Projects and Orders.

If you don't have a TREQ OneDrive folder yet, contact your budget manager to get set up.

Project Folder Name

Your budget manager will give you instructions for how to organize your TREQ attachments in OneDrive. Generally they want you to create a folder per TREQ project, using the Project Number as the folder name. TREQ Project Numbers look like "TREQ001234".

These folder names are just suggestions. It is up to you to create the folder in OneDrive. If your project has its own organization, understood by your fiscal budget manager, you should continue to use that.

46 Click "OneDrive Folder"

TREQ018041

Student Orientation XYZ Program - FY26

Purchase | Creating | Darshini Stark

Food purchase

Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Upload Attachments

Create folder in OneDrive named

TREQ018041 Copy

Open OneDrive Folder
OneDrive Folder

After you have added any required material to your OneDrive project folder, click "Done Uploading" to proceed.

Done Uploading

Help: Attachments

Frequently supplemental files are needed to process requests in TREQ. For example:

- Receipts scanned as PDF files
- Signed Food Policy documents
- Conference agendas
- Invoice to be paid

OneDrive

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The fiscal office will designate a specific OneDrive folder you should use for your TREQ requests. A link will be provided to that folder within your TREQ Projects and Orders.

If you don't have a TREQ OneDrive folder yet, contact your budget manager to get set up.

Project Folder Name

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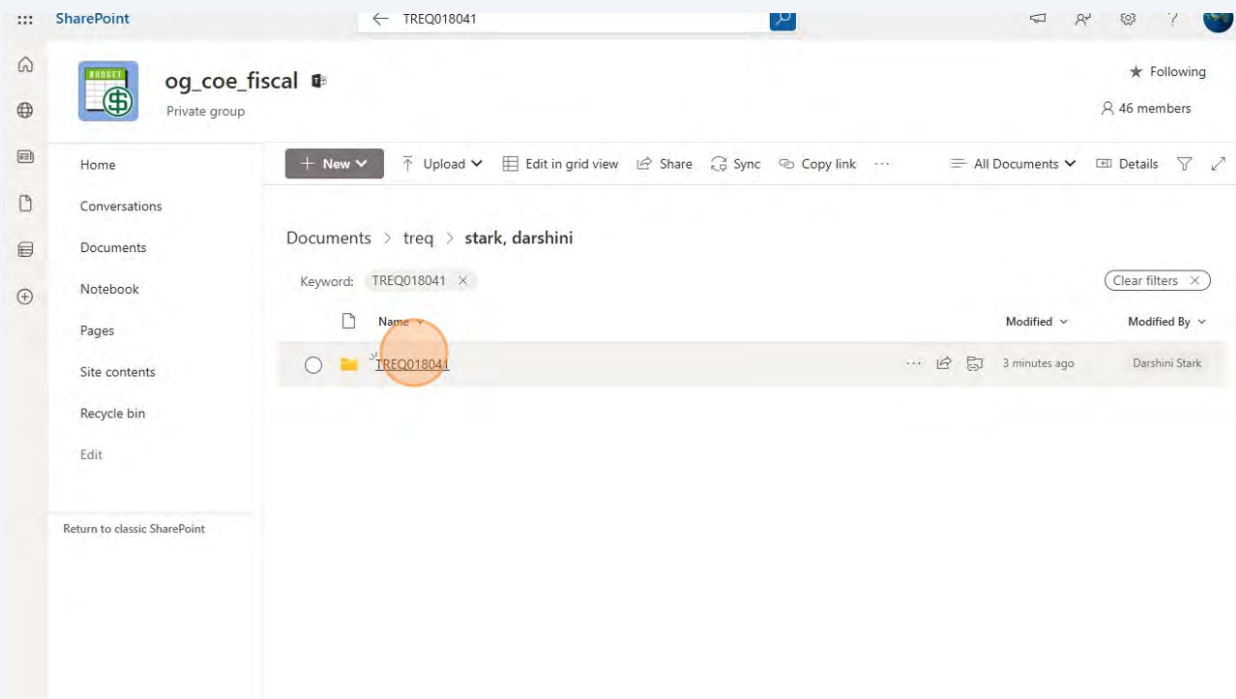
These folder names are just suggestions. It is up to you to create the folder in OneDrive. If your project has its own organization, understood by your fiscal budget manager, you should continue to use that.

47 Search for your TREQ folder

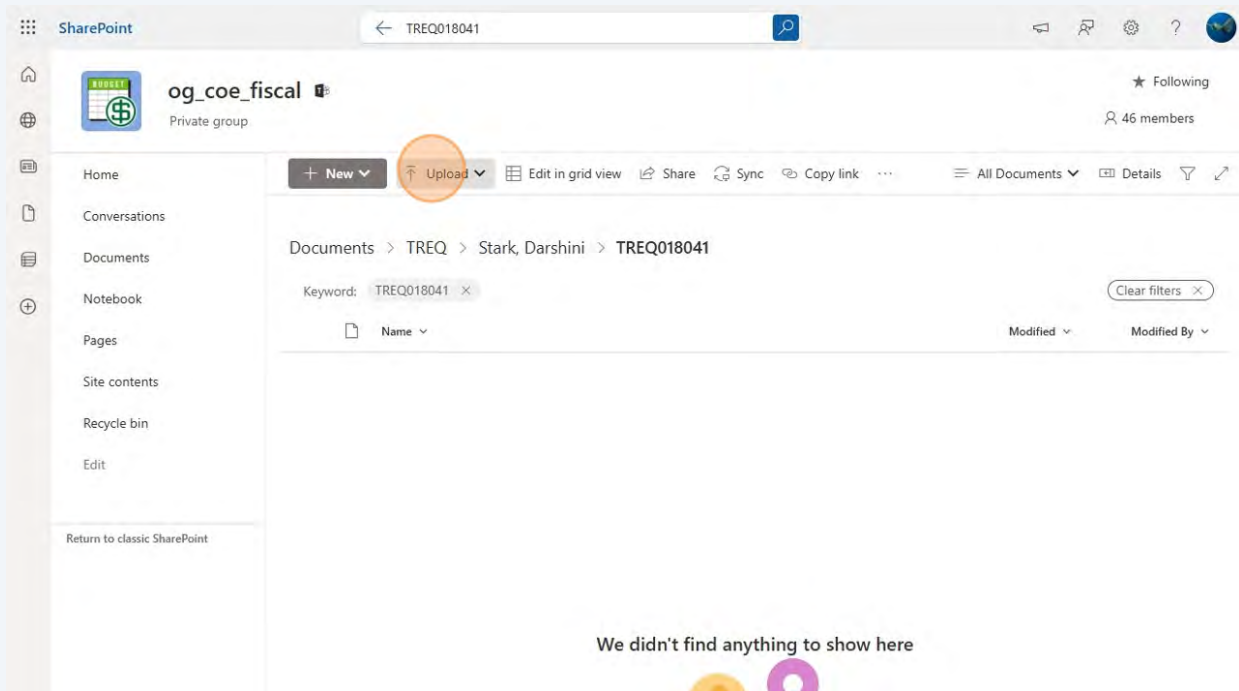
The screenshot shows a SharePoint library view for a group named 'og_coe_fiscal'. The breadcrumb navigation indicates the current location is 'Documents > treq > stark, darshini'. A table lists several folders, each named with a TREQ project number. The 'Modified' column shows dates from September 1, 2020, to September 21, 2020, and the 'Modified By' column shows 'Darshini Stark' for all entries.

Name	Modified	Modified By
TREQ000048	September 1, 2020	Darshini Stark
TREQ000110	September 2, 2020	Darshini Stark
TREQ000112	September 2, 2020	Darshini Stark
TREQ000114	September 2, 2020	Darshini Stark
TREQ000115	September 2, 2020	Darshini Stark
TREQ000116	September 2, 2020	Darshini Stark
TREQ000117	September 2, 2020	Darshini Stark
TREQ000143	September 9, 2020	Darshini Stark
TREQ000238	September 21, 2020	Darshini Stark

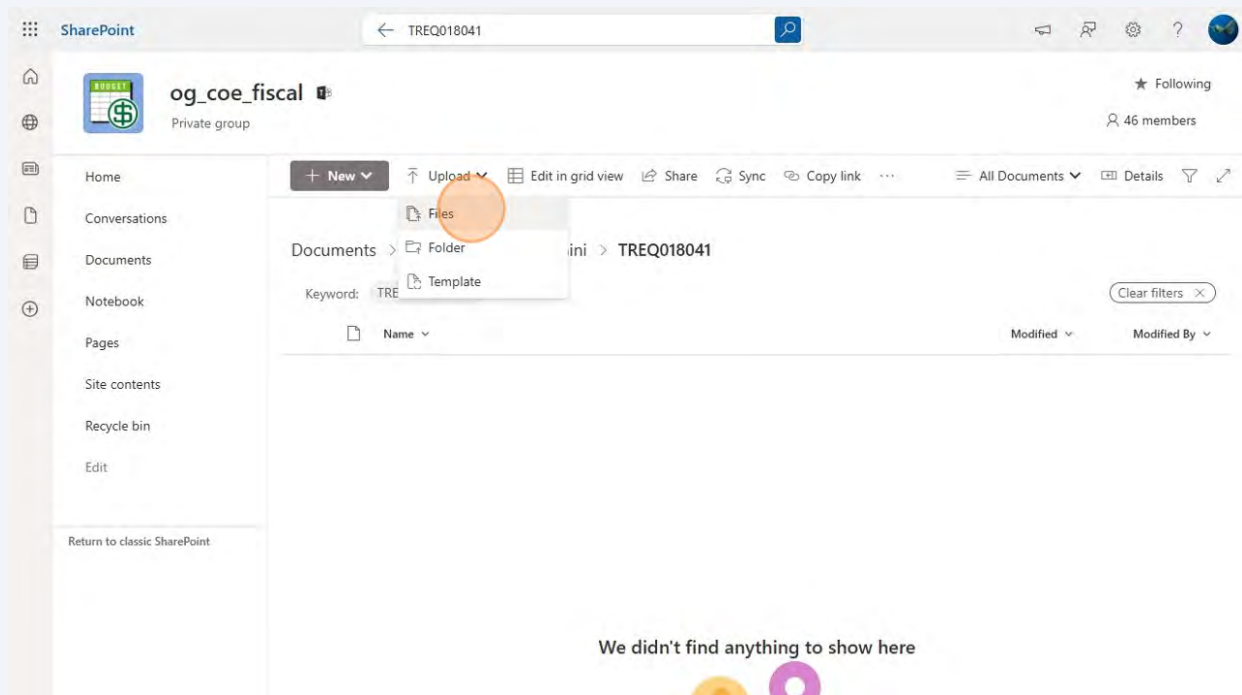
48 And open it



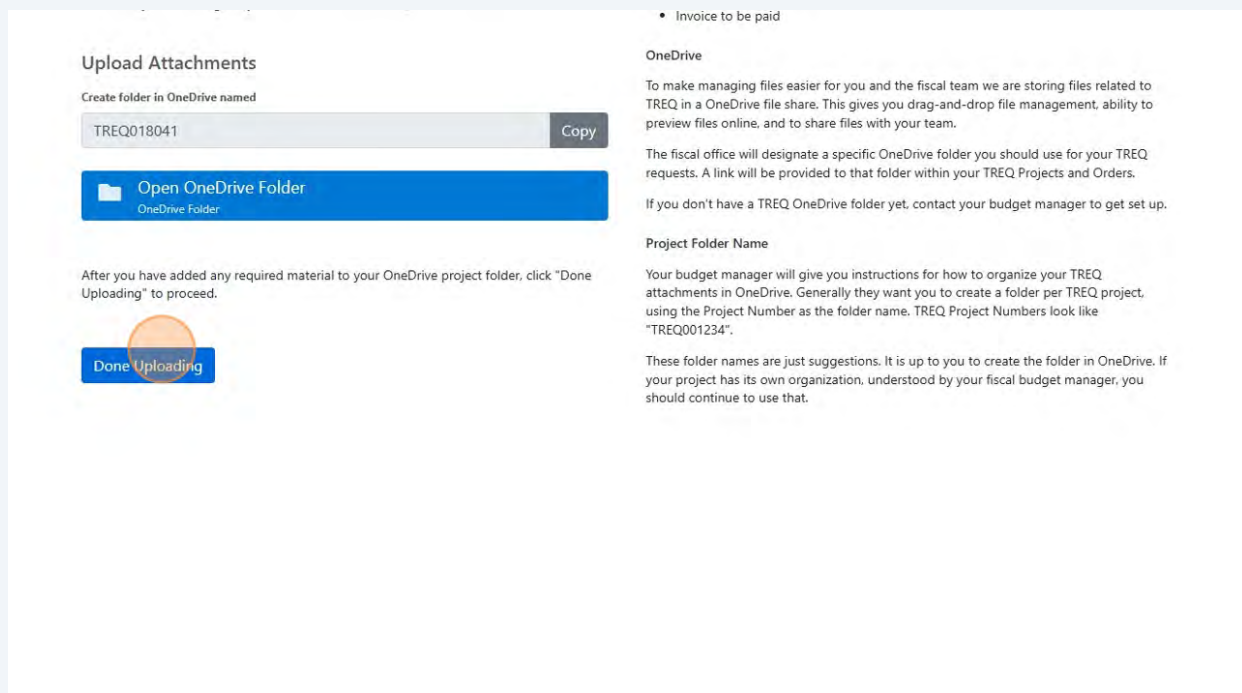
49 Click "Upload"



50 Click "Files"



51 Return to TREQ when done and click "Done Uploading"



52 Click "Continue" if there are no changes to the funding

🍷 Food purchase Food Policy acknowledged by Darshini Stark on Wed, Sep 17, 2025 at 3:38 PM.

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS	SPLIT
PG104018	🖋 Office of Student Service Operations	🖋	* Remainder 🖋
+ Fiscal Tag			

💬 Add a Note

Finished entering Fiscal Tags

Continue

✕ Cancel this Order...

53 Click "Submit"

📋 Department Pre-Auth

Wed, 9/17/2025, 3:42 PM
Darshini Stark requested approval from Martin Howell
| Department Approval was provided on pre-authorization for this project

Wed, 9/17/2025, 3:41 PM
Approved by Darshini Stark, on behalf of Martin Howell

👍 Food Pre-Auth

Wed, 9/17/2025, 3:42 PM
Darshini Stark requested approval from Santhi Perumal
| Food Approval was provided on pre-authorization for this project

Wed, 9/17/2025, 3:41 PM
Approved by Darshini Stark, on behalf of Santhi Perumal

Submit

✕ Cancel this Order...

📧 Contact • Help • Privacy • Terms
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You can repeat this + order steps whenever something needs to be purchased, reimbursed, or paid for in relation to this specific Pre-Authorization!