

# TREQ: Submitting a Purchase Request

This guide walks you through how to submit a TREQ request for a purchase to be made by the finance office.

1

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

Needs Action13Creating1My Orders22My Trips7On Call6Pending281

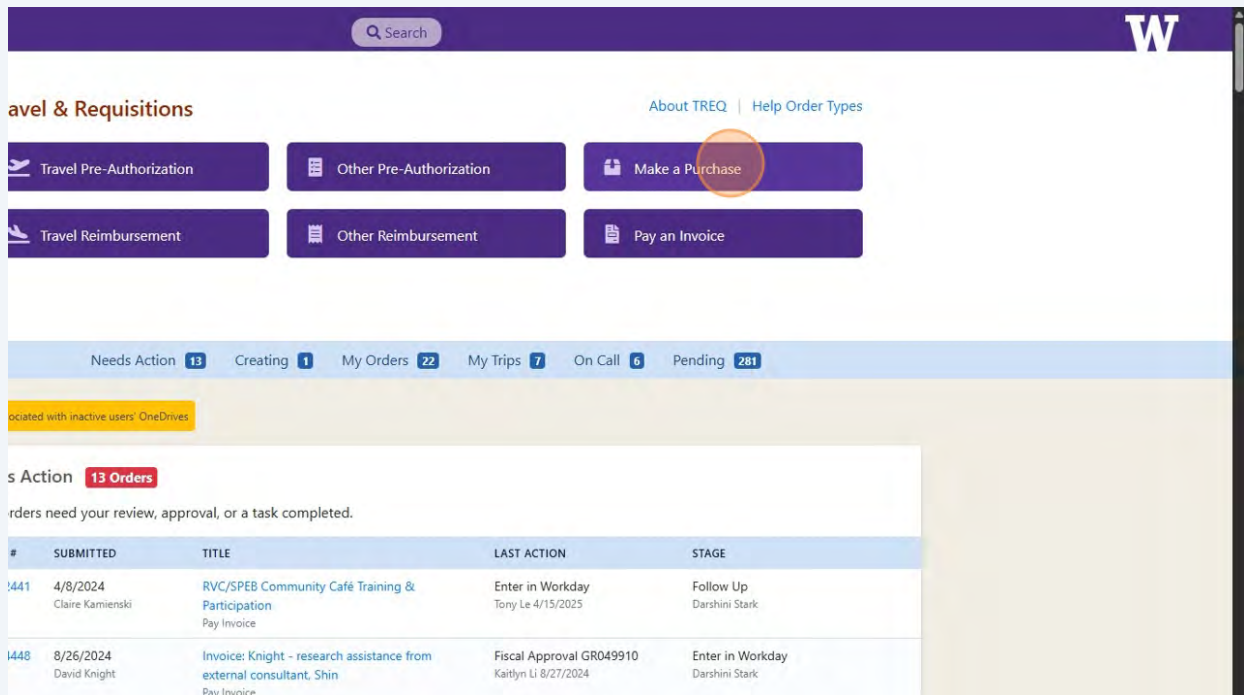
13 projects associated with inactive users' OneDrives

Needs Action13 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 Seriana 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

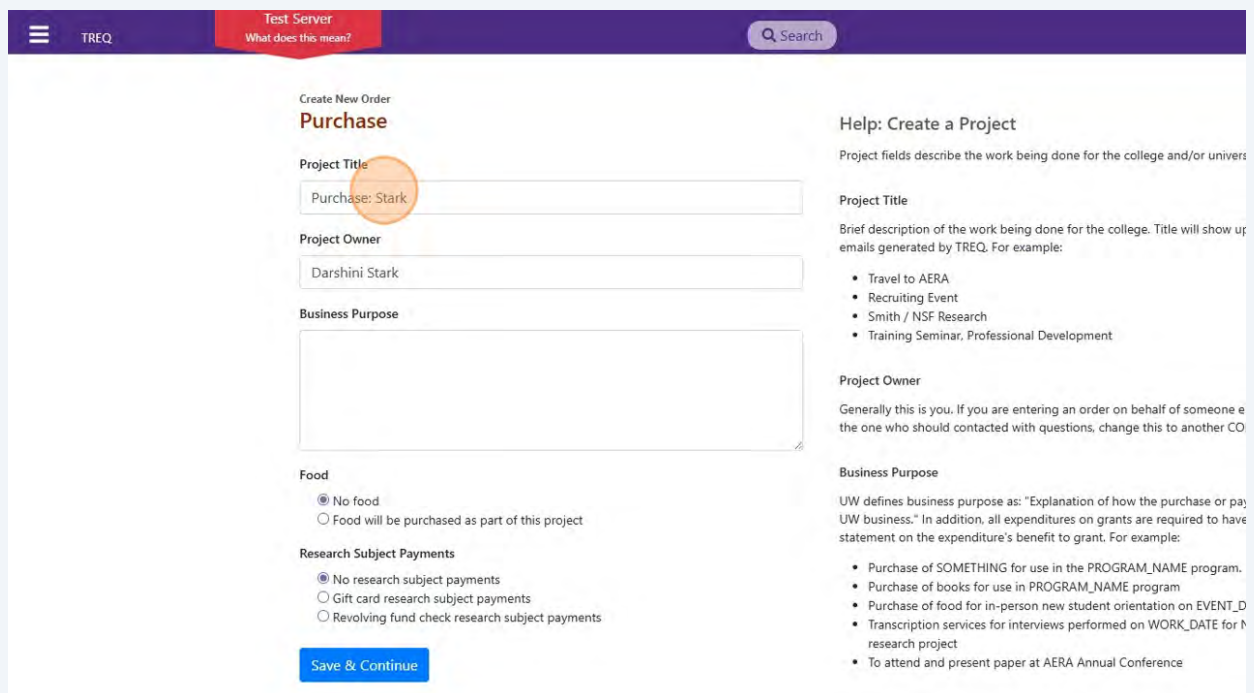
## 2 Click "Make a Purchase"



The screenshot shows the UW TREQ dashboard. At the top, there is a search bar and a 'W' logo. Below the header, there are links for 'About TREQ' and 'Help Order Types'. The main content area features a grid of buttons: 'Travel Pre-Authorization', 'Other Pre-Authorization', 'Make a Purchase' (circled in orange), 'Travel Reimbursement', 'Other Reimbursement', and 'Pay an Invoice'. Below this grid, there is a summary bar with counts for various order statuses: Needs Action (13), Creating (1), My Orders (22), My Trips (7), On Call (6), and Pending (281). A section titled 'Needs Action' with a red badge indicating 13 orders is visible, followed by a table of orders requiring review.

#	SUBMITTED	TITLE	LAST ACTION	STAGE
1441	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
1448	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

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



The screenshot shows the 'Create New Order' form in TREQ. The form is titled 'Purchase' and includes fields for 'Project Title', 'Project Owner', and 'Business Purpose'. The 'Project Title' field is circled in orange and contains the text 'Purchase: Stark'. The 'Project Owner' field contains 'Darshini Stark'. The 'Business Purpose' field is empty. Below these fields, there are radio button options for 'Food' and 'Research Subject Payments'. The 'Food' section has two options: 'No food' (selected) and 'Food will be purchased as part of this project'. The 'Research Subject Payments' section has three options: 'No research subject payments' (selected), 'Gift card research subject payments', and 'Revolving fund check research subject payments'. A 'Save & Continue' button is at the bottom. On the right side, there is a 'Help: Create a Project' section with a brief description of the work being done for the college and/or university, and a list of examples for the 'Project Title' field.

**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 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, the one who should be contacted with questions, change this to another COO.

**Business Purpose**

UW defines business purpose as: "Explanation of how the purchase or payment is for UW business." In addition, all expenditures on grants are required to have a 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 the research project
- To attend and present paper at AERA Annual Conference

## 4 Update the "Business Purpose" field.

The screenshot shows the TREQ 'Create New Order' form. The 'Project Title' field contains 'Purchase: Office Supplies'. The 'Project Owner' field contains 'Darshini Stark'. The 'Business Purpose' field is highlighted with an orange circle. Below the form, there are radio button options for 'Food' and 'Research Subject Payments'. The 'Save & Continue' button is at the bottom left.

**Create New Order**  
**Purchase**

**Project Title**  
Purchase: Office Supplies

**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**  
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- Purchase of books for use in PROGRAM\_NAME program
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- Transcription services for interviews performed on WORK\_DATE for a research project
- To attend and present paper at AERA Annual Conference

## 5 Click "Save & Continue"

The screenshot shows the TREQ 'Create New Order' form. The 'Business Purpose' field contains 'Need to purchase office supplies for advancement'. The 'Save & Continue' button is highlighted with an orange circle. The 'Food' and 'Research Subject Payments' radio button options are also visible.

**Business Purpose**  
Need to purchase office supplies for advancement

**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 emails generated by TREQ. For example:

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- 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 a research project
- To attend and present paper at AERA Annual Conference

## 6 Click "+ Item" to add a line item for the invoice

The screenshot shows the TREQ system interface. At the top, there's a purple header with 'TREQ' and a 'Test Server' warning. Below the header, the main content area is titled 'TREQ018044 Purchase: Office Supplies'. Underneath, it says 'Purchase | Creating | Darshini Stark'. The 'Items' section is visible, with a table header: 'Qty', 'Item', 'URL', 'Amount', 'Line Total'. Below the header, there are two buttons: '+ Item' (highlighted with an orange circle) and '+ Tax'. Below these buttons is a 'Save & Continue' button. At the bottom, there are links for 'Add a Note' and 'Cancel this Order...'.

## 7 Update the "Item" field with what needs to be purchased.

The screenshot shows the TREQ system interface with a modal window open for adding a new item. The modal window has a table header: 'Qty', 'Item', 'URL', 'Amount', 'Line Total'. The 'Qty' field is set to '1'. The 'Item' field is highlighted with an orange circle. The 'Amount' field is empty, and the 'Line Total' field shows '0.00'. Below the table, there is a 'URL' field with a placeholder text: '(Optional) Provide a link to a specific item to purchase'. At the bottom of the modal, there are three buttons: 'Save', 'Delete', and 'Cancel'. Below the modal, there is a 'Save & Continue' button. At the bottom, there are links for 'Add a Note' and 'Cancel this Order...'.

## 8 Update "Amount" field with the per item cost

The screenshot shows a web application interface for creating a purchase order. The title is 'TREQ018044 Purchase: Office Supplies'. Below the title, it says 'Purchase | Creating | Darshini Stark'. The main section is titled 'Items' and contains a table with columns: Qty, Item, URL, Amount, and Line Total. There are two buttons: '+ Item' and '+ Tax'. Below the table, there is a form for adding a new item. The 'Qty' field is set to '1'. The 'Item' field contains 'Pens'. The 'Amount' field is highlighted with an orange circle. The 'Line Total' field shows '0.00'. Below the form, there is a 'URL' field with a placeholder text: '(Optional) Provide a link to a specific item to purchase'. At the bottom, there are buttons for 'Save', 'Delete', and 'Cancel', and a 'Save & Continue' button. There is also a link to 'Add a Note'.

Qty	Item	URL	Amount	Line Total
1	Pens			0.00

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

Save Delete Cancel

Save & Continue

[Add a Note](#)

## 9 If there is a specific item being requested, add a link in the URL field.

The screenshot shows the same web application interface as before, but with the 'Amount' field updated to '10'. The 'URL' field is now highlighted with an orange circle. The 'Line Total' field still shows '0.00'. The 'Save', 'Delete', and 'Cancel' buttons are still present, along with the 'Save & Continue' button and the 'Add a Note' link. A new link 'Cancel this Order...' has appeared at the bottom.

Qty	Item	URL	Amount	Line Total
1	Pens		10	0.00

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

Save Delete Cancel

Save & Continue

[Add a Note](#)

[Cancel this Order...](#)

10

Update the "Qty" field with the amount of that item to purchase. It will calculate the Line Item total

**TREQ018044**  
**Purchase: Office Supplies**  
Purchase | Creating | Darshini Stark

Items

Qty	Item	URL	Amount	Line Total
1	Pens	<a href="#">Link...</a>	10.00	\$10.00

+ Item + Tax

Qty: 1

Item: Binders

Amount: 15

Line Total: \$15.00

URL:

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

Save Delete Cancel

Save & Continue

Add a Note

11

Click "Save"

1 Pens [Link...](#) 10.00 \$10.00

+ Item + Tax

Qty: 3

Item: Binders

Amount: 15

Line Total: \$45.00

URL:

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

Save Delete Cancel

Save & Continue

Add a Note

Cancel this Order...

## 12 Click "Save & Continue"

**TREQ018044**  
**Purchase: Office Supplies**  
Purchase | Creating | Darshini Stark

Items

Qty	Item	URL	Amount	Line Total
4	Pens	<a href="#">Link...</a>	10.00	\$40.00
3	Binders	<a href="#">Link...</a>	15.00	\$45.00

+ Item + Tax

**Save & Continue**

[Add a Note](#)

[Cancel this Order...](#)



Please note that items must be delivered to a UW business address

13 In the "Mailing Address" field include where the items should be delivered.

The screenshot shows a web form for a purchase request. At the top, it displays 'TREQ018044' and 'Purchase: Office Supplies'. Below this, there's a breadcrumb trail: 'Purchase | Creating | Darshini Stark'. The 'Mailing Address' section is highlighted with a light blue border. It contains a text input field with the placeholder 'Include mailing address here'. A blue 'Save' button is located below the input field, and a link 'Cancel this Order...' is at the bottom of the section.

14 Now it's time to make the corresponding TREQ folder. Press the grey "Copy"

The screenshot shows the 'Upload Attachments' section of the TREQ018044 purchase form. It includes a text input field for 'Create folder in OneDrive named' with the value 'TREQ018044'. A grey 'Copy' button is positioned to the right of the input field. Below the input field is a blue button labeled 'Open OneDrive Folder'. To the right of the input field, there's a 'Help: Attachments' section with a list of frequently supplemental files: 'Receipts scanned as PDF files', 'Signed Food Policy documents', 'Conference agendas', and 'Invoice to be paid'. Below this is a 'OneDrive' section with instructions on how to manage files and create a folder. At the bottom, there's a 'Project Folder Name' section with instructions on how to name the folder. A blue 'Done Uploading' button is located at the bottom left of the form.

## 15 Click "Open OneDrive Folder"

**TREQ018044**  
**Purchase: Office Supplies**  
Purchase | Creating | Darshini Stark

**Upload Attachments**  
Create folder in OneDrive named  
TREQ018044 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 TREQ in a OneDrive file share. This gives you drag-and-drop file manager preview files online, and to share files with your team.

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

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

**Project Folder Name**  
Your budget manager will give you instructions for how to organize your attachments in OneDrive. Generally they want you to create a folder per TREQ 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 for your project has its own organization, understood by your fiscal budget manager should continue to use that.

## 16 Click here.

SharePoint Search this library

og\_coe\_fiscal Private group

Home Conversations Documents Notebook Pages Site contents Recycle bin Edit

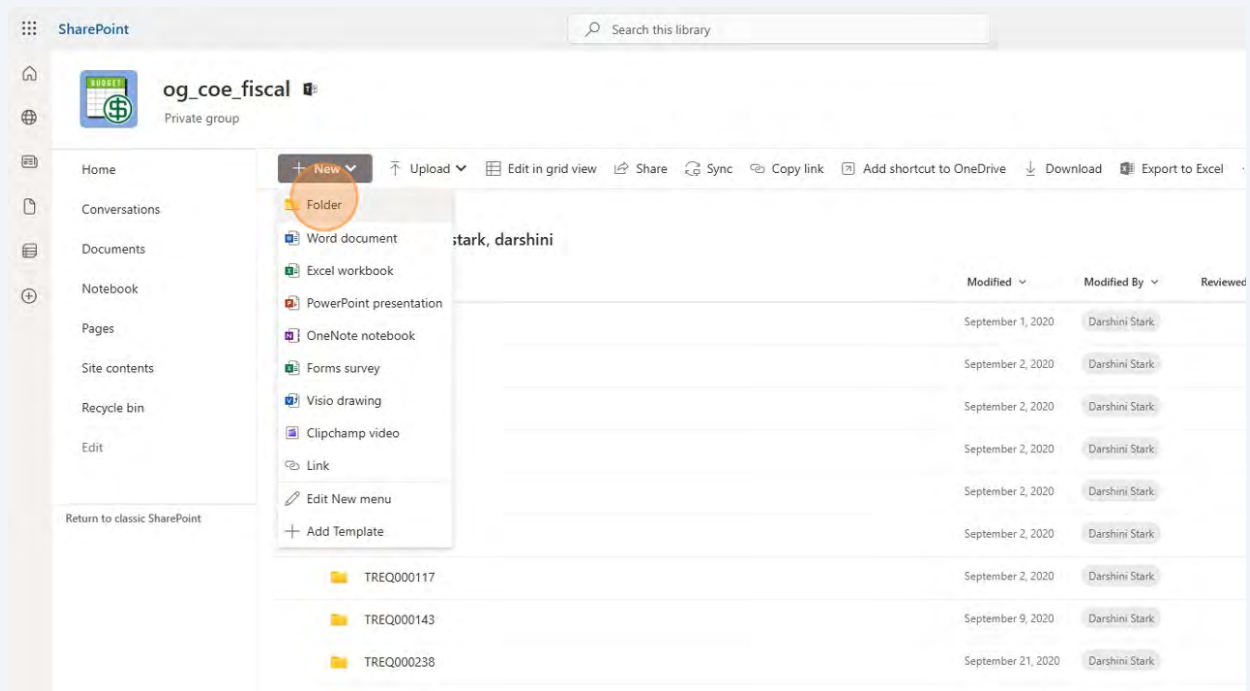
Return to classic SharePoint

**New** Upload Edit in grid view Share Sync Copy link Add shortcut to OneDrive Download Export to Excel

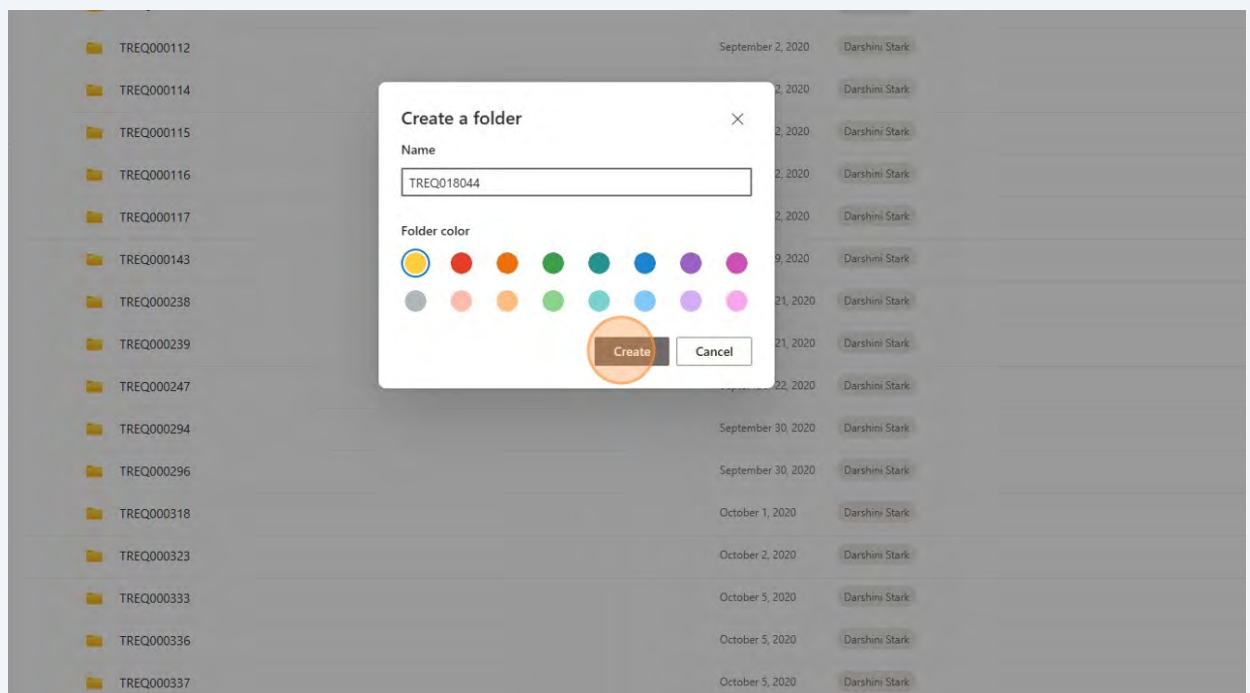
Documents > treq > stark, darshini

Name	Modified	Modified By	Reviewed
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	

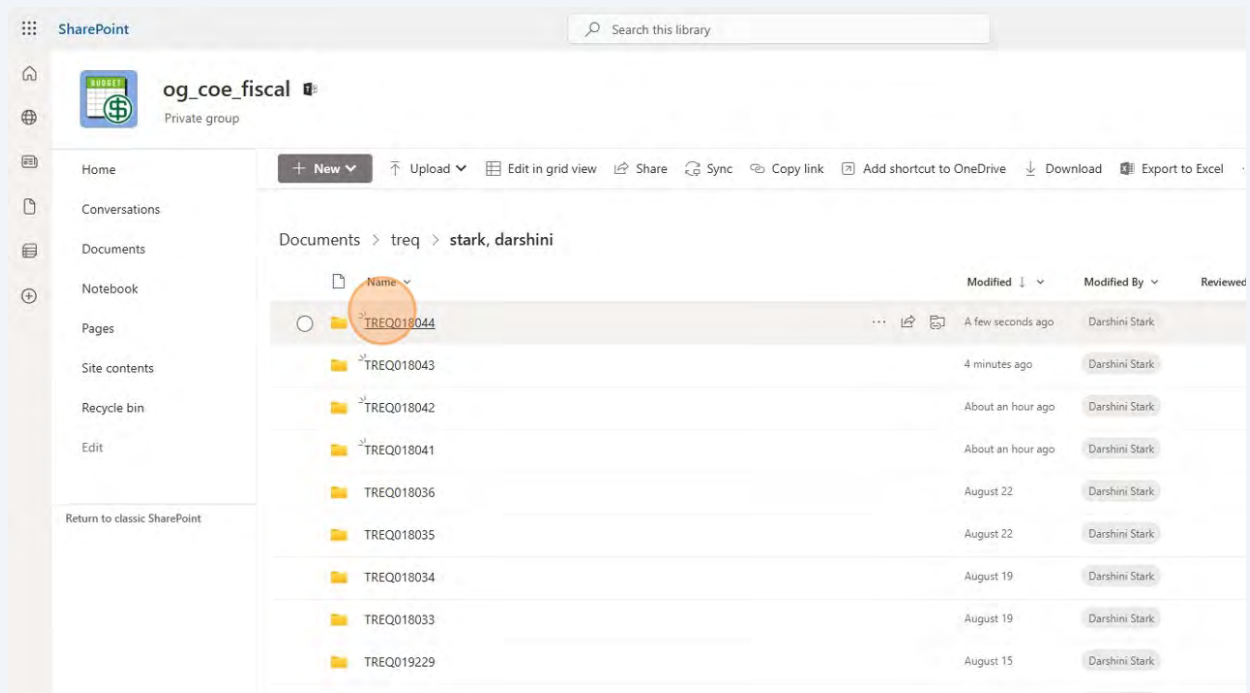
## 17 Click "Folder"



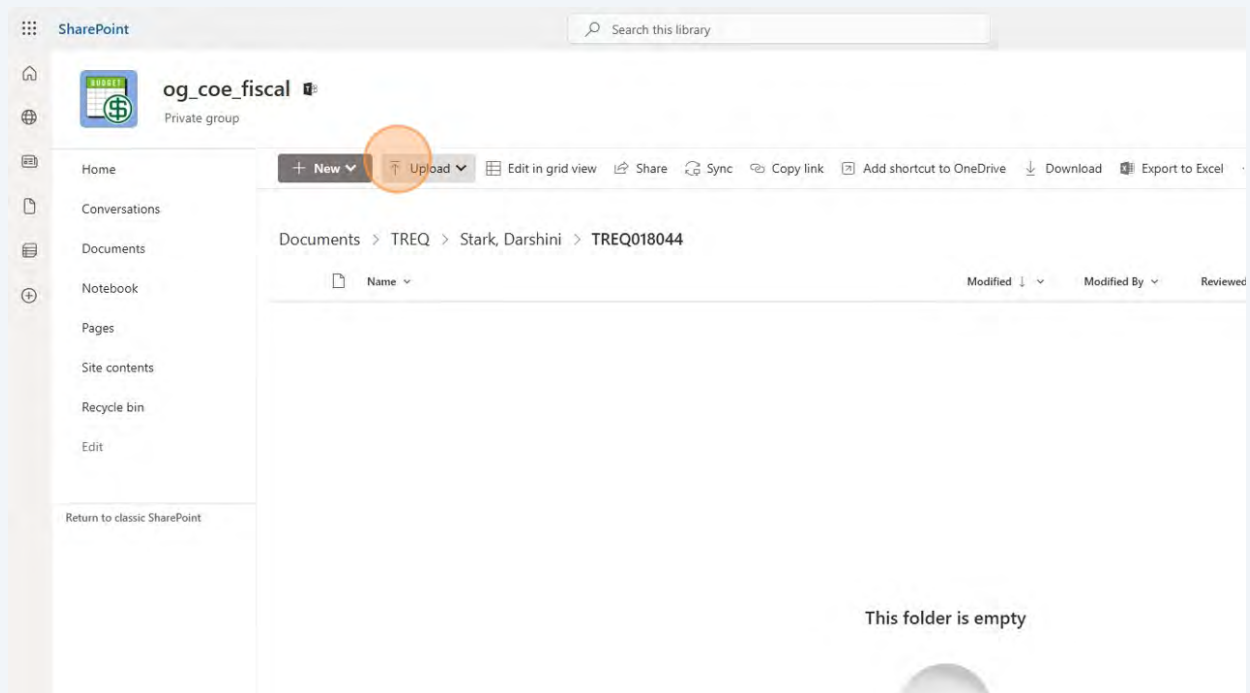
## 18 Paste the TREQ number in the "Name" then press "Create"



## 19 Open the folder you just created



## 20 Click "Upload" to add any supporting documentation like itemized receipts



## 21 Click "Done Uploading"

Purchase | Creating | Darshini Stark

### Upload Attachments

Create folder in OneDrive named

TREQ018044

Copy

Open OneDrive Folder

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

Done Uploading

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 requests. A link will be provided to that folder within your TREQ Projects area.

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

**Project Folder Name**

Your budget manager will give you instructions for how to organize your attachments in OneDrive. Generally they want you to create a folder per TREQ 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 for your project has its own organization, understood by your fiscal budget manager. You should continue to use that.

## 22 In the "Fiscal Tag" box, type in the number or name of the fund that will be used

Purchase: Office Supplies

Purchase | Creating | Darshini Stark

### Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS
+ Fiscal Tag		

Fiscal Tag

advance

PG101783 Advancement Discretionary  
Replaces 64-4512 EDU ADVANCEMENT DISC.  
PG224511 Advancement Operations

Name of Fiscal Tag

Split

Split Type

\* Remainder

Assignee Tag

AS000000

Search by employee name or worktag number

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.

**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

## 23 Click "Save"

The screenshot shows a 'Fiscal Tags' form. At the top, there is a table with columns: FISCAL TAG, NAME, and OTHER TAGS. Below the table, there is a '+ Fiscal Tag' button. The form contains several input fields: 'Fiscal Tag' (with value PG224511), 'Name' (with value Advancement Operations), 'Split' (with a dropdown arrow), 'Split Type' (with value \* Remain), 'Activity Tag' (with value AC000000), and 'Assignee Tag' (with value AS000000). Below these fields, there is a 'Search by employee name or worktag number' label. At the bottom left, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with an orange circle. Below the form, there is a section titled 'Fiscal Tag' with a description: '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.' Below this, there is a section titled 'Name' with a description: 'Name or description of the Fiscal Tag. If you choose a suggestion in the Fiscal Tag field, this is filled in for you.' Below this, there is a section titled 'Activity Tag' with a description: '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.' Below this, there is a section titled 'Assignee Tag'.

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS
PG224511	Advancement Operations	

+ Fiscal Tag

Fiscal Tag: PG224511, Name: Advancement Operations, Split: [dropdown], Split Type: \* Remain, Activity Tag: AC000000, Assignee Tag: AS000000

Search by employee name or worktag number

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.

**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**

## 24 Click "Continue"

The screenshot shows the 'Fiscal Tags' form after the 'Save' button was clicked. The form now displays the entered data in a table. Below the table, there is a '+ Fiscal Tag' button. Below the table, there is a 'Add a Note' button. Below the table, there is a 'Finished entering Fiscal Tags' message. Below the message, there is a 'Continue' button, which is highlighted with an orange circle. Below the 'Continue' button, there is a 'Cancel this Order...' link.

Purchase Office Supplies

Purchase | Creating | Darshini Stark

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS
PG224511	Advancement Operations	

+ Fiscal Tag

Add a Note

Finished entering Fiscal Tags

Continue

Cancel this Order...

## 25 Review the TREQ before submitting it

**Project Owner**  
Darshini Stark [Change Project](#)

**Business Purpose**  
Need to purchase office supplies for advancement

**Items** [Change Items](#)

ITEM		AMOUNT
Pens (4 x 10.00)	<a href="#">Link...</a>	\$40.00
Binders (3 x 15.00)	<a href="#">Link...</a>	\$45.00
Total		\$85.00

**Fiscal Tags** [Change Fiscal Tags](#)

TAG	NAME	OTHER TAGS	SPLIT
PG224511	Advancement Operations		*

**Department Approval**

☒ 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

## 26 Then click "Submit" and you're done!

**Department Approval**

☒ 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**  
Jessica Norouzi

**Approver Note**  

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

[Submit](#)

[Cancel this Order...](#)

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