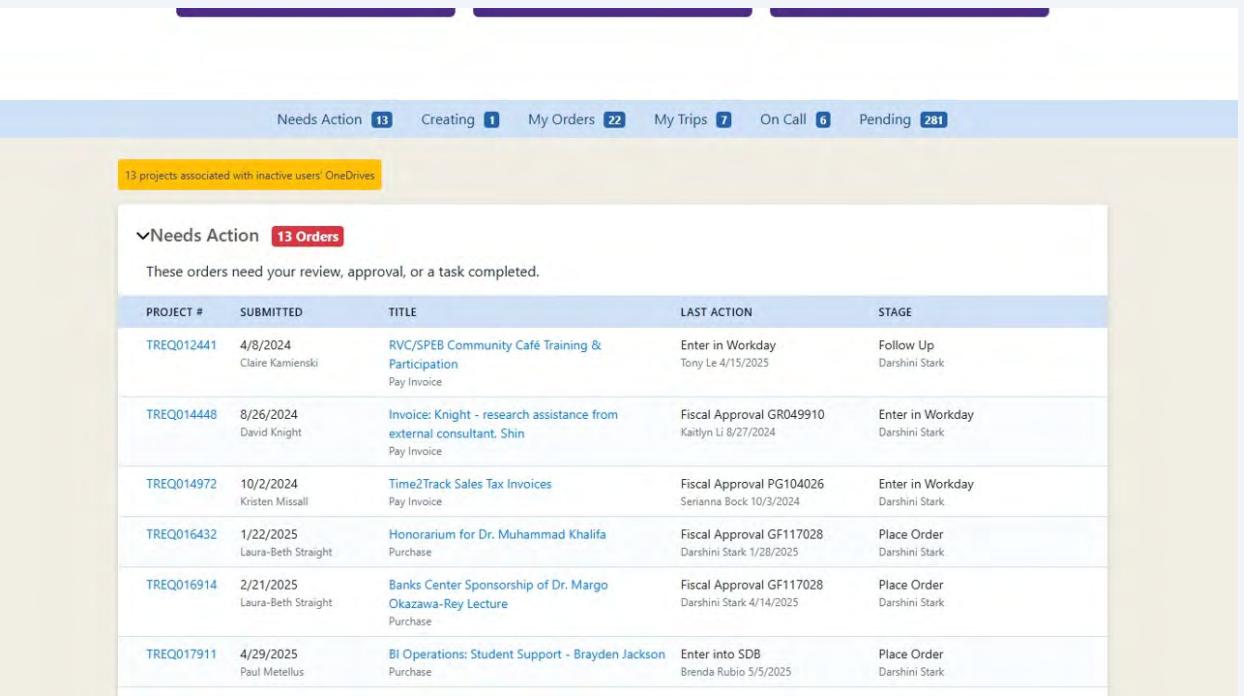


TREQ: Submitting a Purchase Request

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

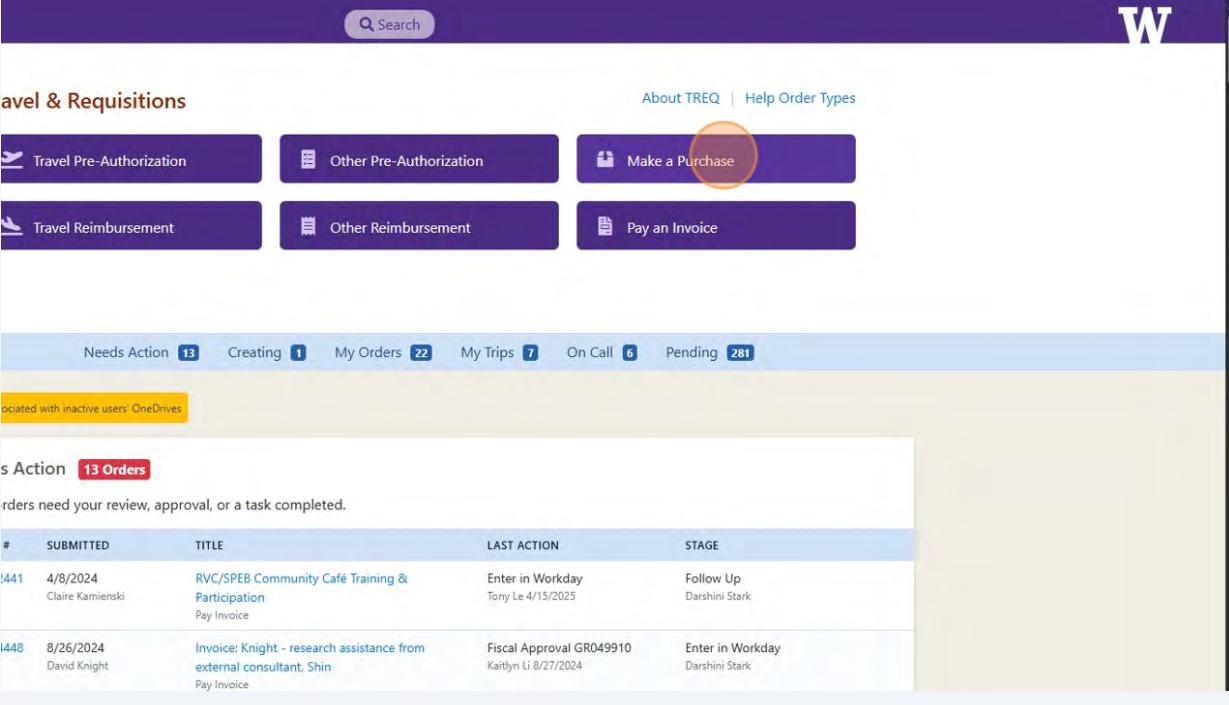
- 1 Navigate to <https://educ.uw.edu/treq/>



The screenshot shows the TREQ application interface. At the top, there is a navigation bar with links: 'Needs Action' (3), 'Creating' (1), 'My Orders' (22), 'My Trips' (7), 'On Call' (6), and 'Pending' (28). Below the navigation bar, a message box states '13 projects associated with inactive users' OneDrives'. The main content area is titled 'Needs Action' and shows '13 Orders'. A sub-header 'These orders need your review, approval, or a task completed.' is present. A table lists the orders with columns: PROJECT #, SUBMITTED, TITLE, LAST ACTION, and STAGE. The orders are:

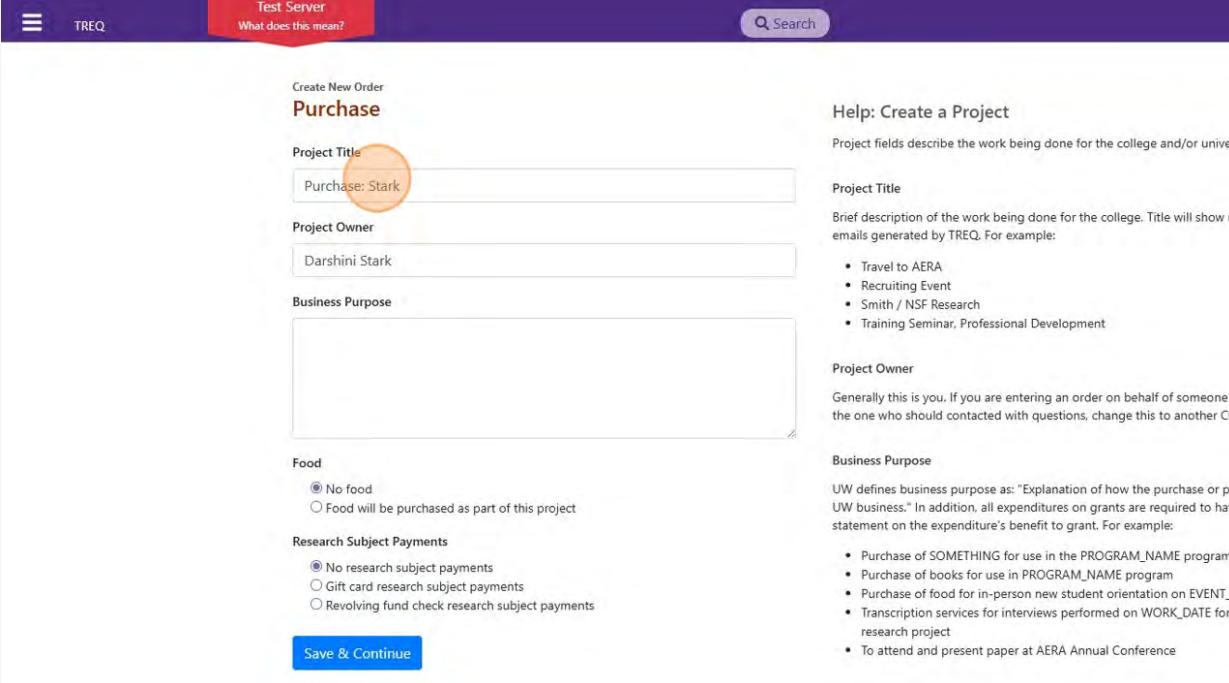
PROJECT #	SUBMITTED	TITLE	LAST ACTION	STAGE
TREQ012441	4/8/2024 Claire Kamienski	RVC/SPEB Community Café Training & Participation Pay Invoice	Enter in Workday Tony Le 4/15/2025	Follow Up Darshini Stark
TREQ014448	8/26/2024 David Knight	Invoice: Knight - research assistance from external consultant, Shin 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 "Make a Purchase"



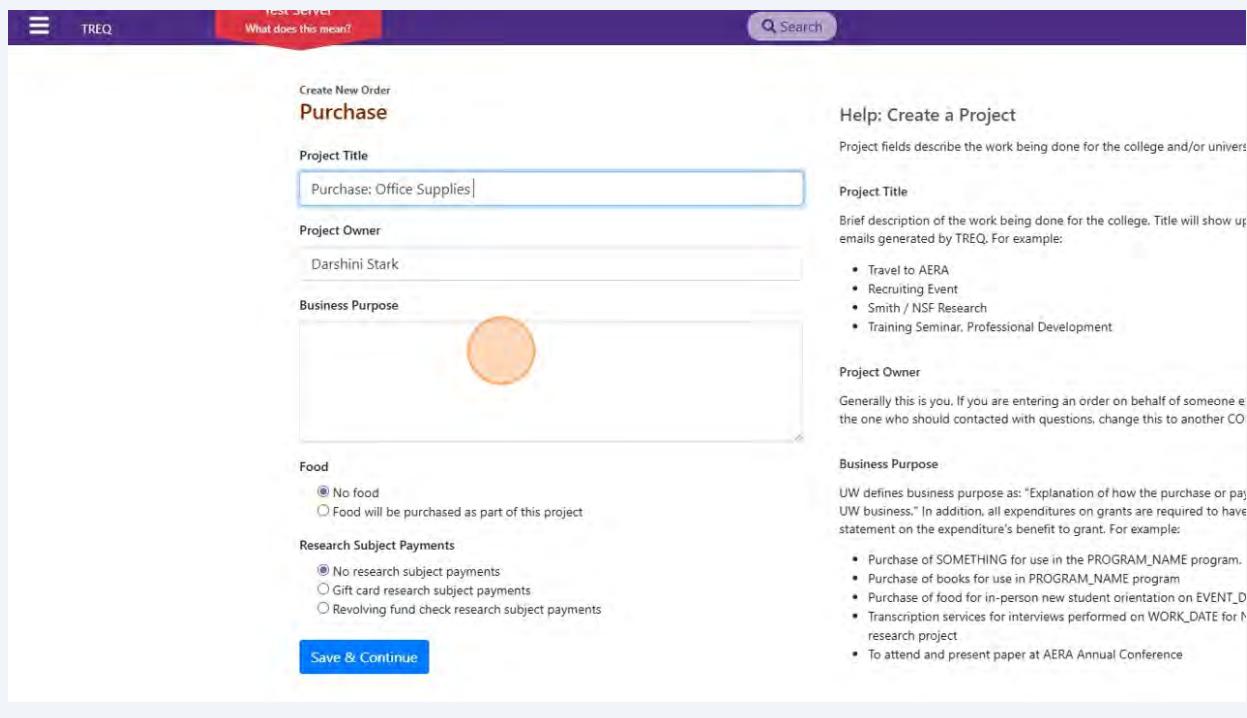
The screenshot shows the TREQ (Travel & Requisitions) interface. At the top, there is a purple header with a search bar and a large 'W' logo. Below the header, there are several buttons: 'Travel Pre-Authorization', 'Other Pre-Authorization', 'Make a Purchase' (which is highlighted with a yellow circle), 'Travel Reimbursement', 'Other Reimbursement', and 'Pay an Invoice'. A navigation bar at the bottom includes links for 'Needs Action' (13), 'Creating' (1), 'My Orders' (22), 'My Trips' (7), 'On Call' (6), and 'Pending' (281). A message box in the center says 'Associated with inactive users' OneDrives'. Below this, a 'Actions' section shows '13 Orders' with a table listing two items: I441 (4/8/2024) and I448 (8/26/2024).

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



The screenshot shows the 'Purchase' form. At the top, there is a purple header with a 'Test Server' link and a 'Search' bar. The main form has a title 'Create New Order' and a 'Purchase' section. The 'Project Title' field contains 'Purchase: Stark' and is highlighted with a yellow circle. The 'Project Owner' field contains 'Darshini Stark'. The 'Business Purpose' field is empty. To the right, there is a 'Help: Create a Project' section with a description and a list of project types. Below the form, there are sections for 'Food' (radio buttons for 'No food' and 'Food will be purchased as part of this project'), 'Research Subject Payments' (radio buttons for 'No research subject payments', 'Gift card research subject payments', and 'Revolving fund check research subject payments'), and a 'Save & Continue' button.

4 Update the "Business Purpose" field.



The screenshot shows the TREQ Purchase form. The 'Business Purpose' field is highlighted with a blue border. The form includes fields for Project Title, Project Owner, Business Purpose, Food, Research Subject Payments, and a 'Save & Continue' button. To the right, there is a 'Help: Create a Project' sidebar with examples of business purposes.

Project Title: Purchase: Office Supplies

Project Owner: Darshini Stark

Business Purpose: (highlighted)

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:

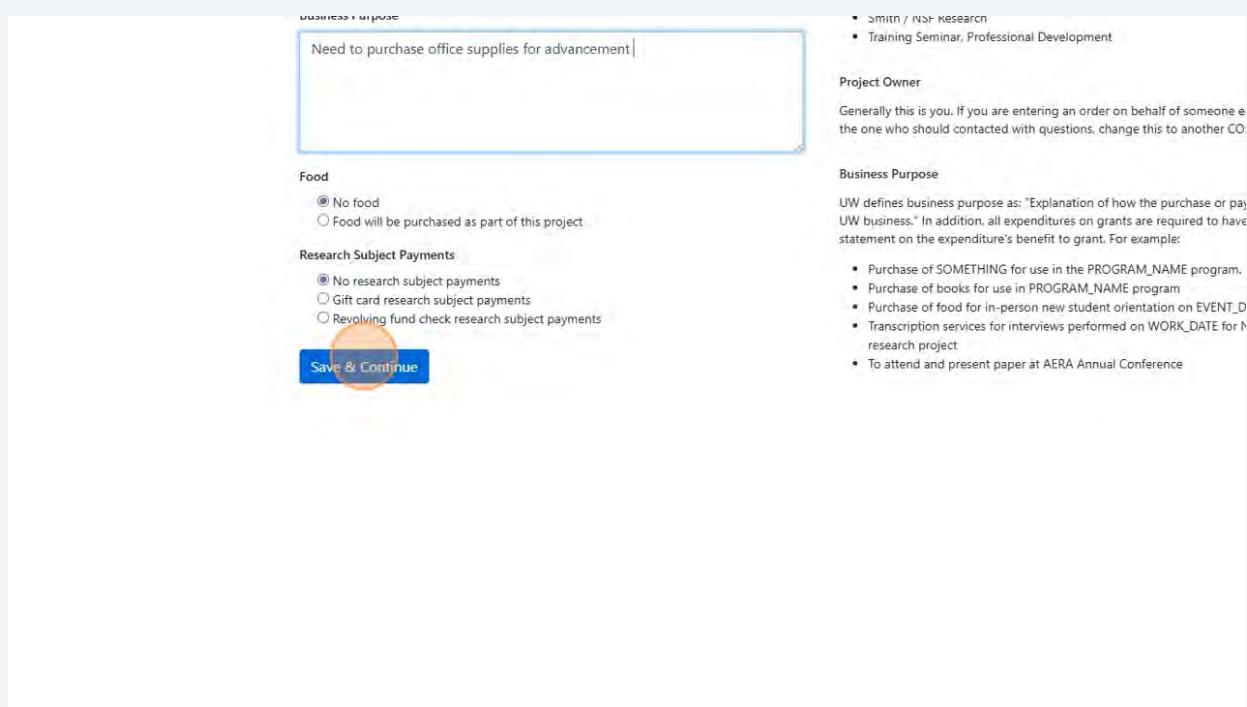
- Travel to AERA
- Recruiting Event
- Smith / NSF Research
- Training Seminar, Professional Development

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 CO.

Business Purpose:
UW defines business purpose as: "Explanation of how the purchase or payment relates to 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 N research project
- To attend and present paper at AERA Annual Conference

5 Click "Save & Continue"



The screenshot shows the TREQ Purchase form with the 'Save & Continue' button circled in orange. The form includes fields for Project Title, Project Owner, Business Purpose, Food, Research Subject Payments, and a 'Save & Continue' button. To the right, there is a 'Help: Create a Project' sidebar with examples of business purposes.

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:

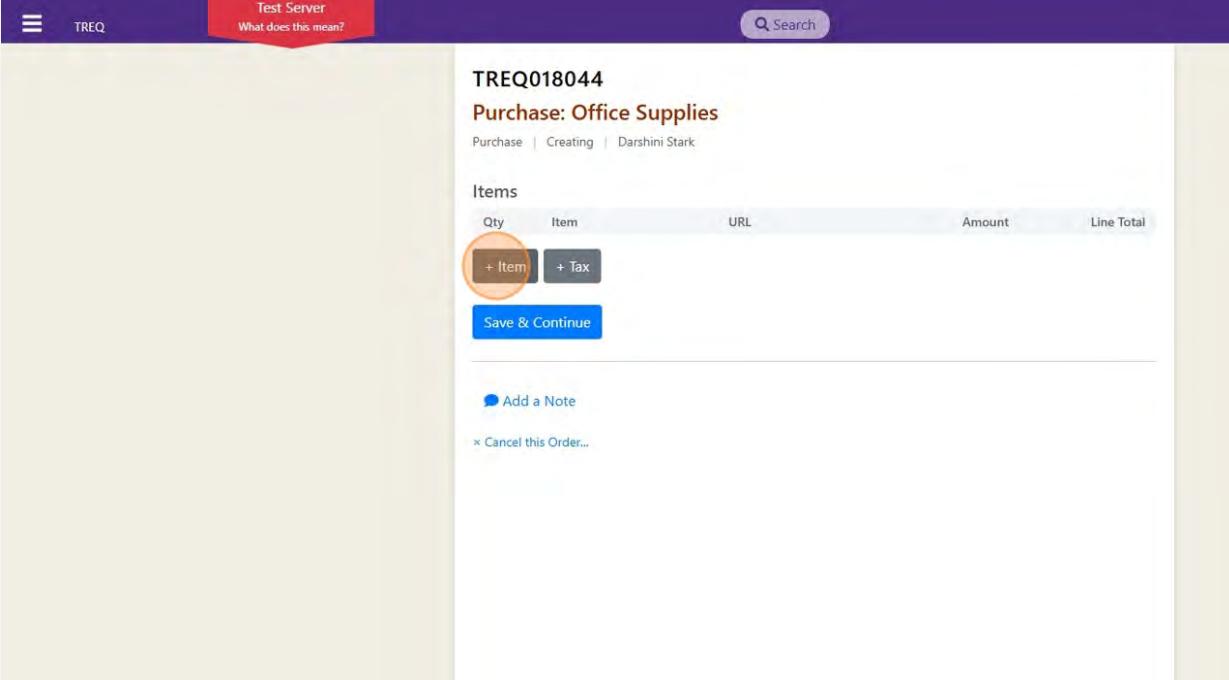
- Travel to AERA
- Recruiting Event
- Smith / NSF Research
- Training Seminar, Professional Development

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 CO.

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

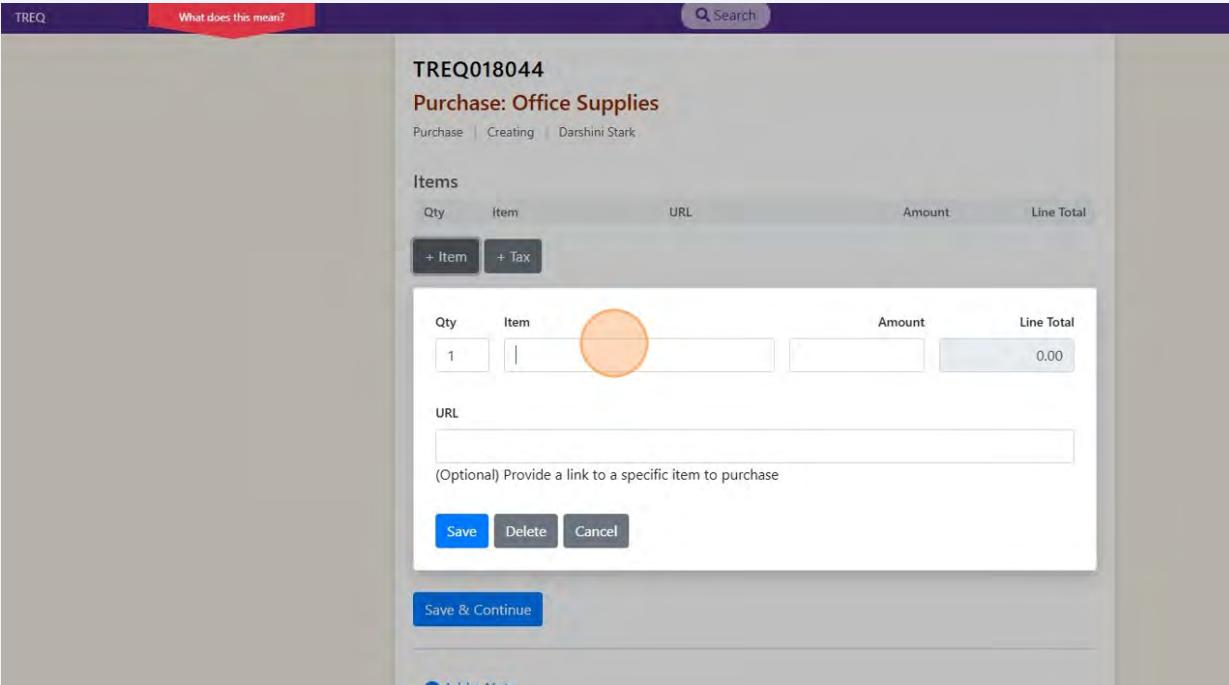
- Purchase of SOMETHING for use in the PROGRAM_NAME program.
- Purchase of books for use in PROGRAM_NAME program
- Purchase of food for in-person new student orientation on EVENT_DATE
- Transcription services for interviews performed on WORK_DATE for N research project
- To attend and present paper at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

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



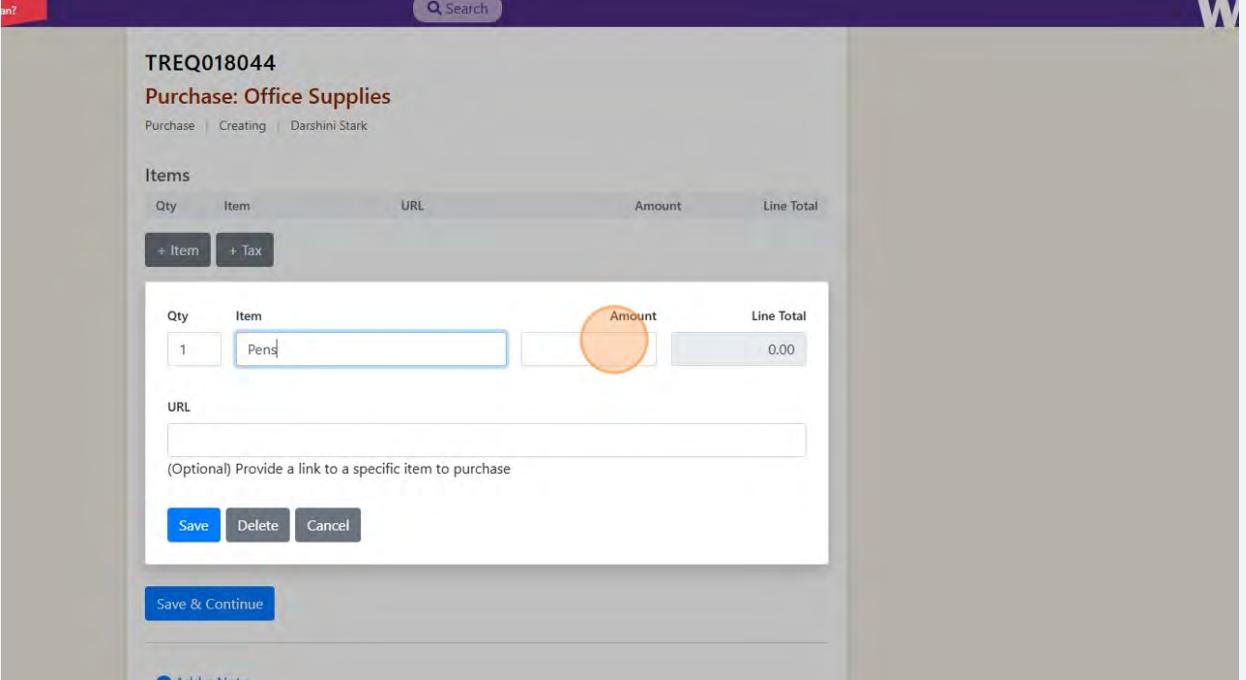
The screenshot shows the TREQ application interface for creating a purchase. The title bar indicates "Test Server" and "TREQ". The main area is titled "TREQ018044 Purchase: Office Supplies" and shows the status "Creating" by "Darshini Stark". A table header for "Items" is visible with columns: Qty, Item, URL, Amount, and Line Total. Below the table, there are two buttons: "+ Item" (highlighted with an orange circle) and "+ Tax". A "Save & Continue" button is also present. 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.



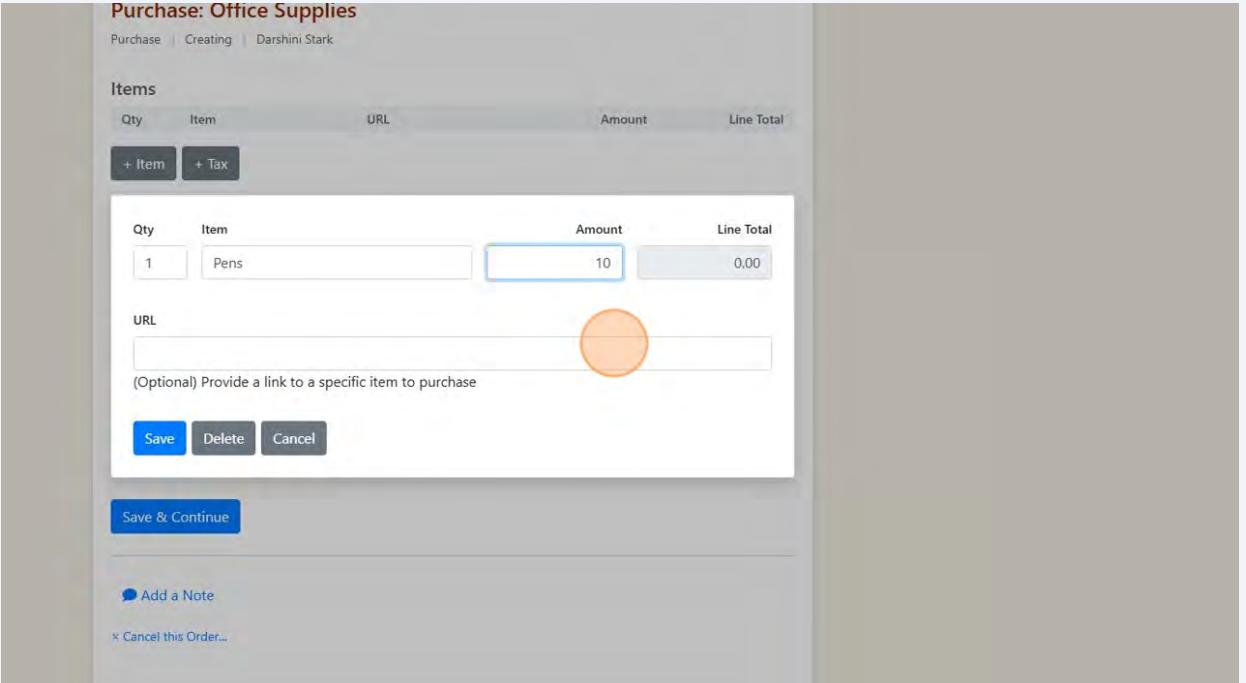
The screenshot shows the TREQ application interface for creating a purchase. The title bar indicates "TREQ" and "What does this mean?". The main area is titled "TREQ018044 Purchase: Office Supplies" and shows the status "Creating" by "Darshini Stark". A table header for "Items" is visible with columns: Qty, Item, URL, Amount, and Line Total. Below the table, there are two buttons: "+ Item" and "+ Tax". A modal dialog is open, showing a table for adding a line item. The "Item" field in this dialog is highlighted with an orange circle. The modal also includes fields for "Qty" (set to 1), "Amount" (set to 0.00), and a "URL" input field with the placeholder "(Optional) Provide a link to a specific item to purchase". At the bottom of the modal are "Save", "Delete", and "Cancel" buttons, and a "Save & Continue" button is located at the bottom of the main purchase creation screen.

8 Update "Amount" field with the per item cost



The screenshot shows a software interface for creating a purchase order. The title bar says "TREQ018044 Purchase: Office Supplies". The main area is titled "Items" and has columns for Qty, Item, URL, Amount, and Line Total. A row is selected with Qty 1, Item "Pens", and Line Total 0.00. The "Amount" field is highlighted with a red circle. Below the table is a URL input field with the placeholder "(Optional) Provide a link to a specific item to purchase". At the bottom are "Save", "Delete", and "Cancel" buttons, and a "Save & Continue" button.

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



The screenshot shows the same software interface as the previous one, but the URL field is now highlighted with a red circle. The URL input field contains the placeholder "(Optional) Provide a link to a specific item to purchase". The rest of the interface is identical to the previous screenshot.

10

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

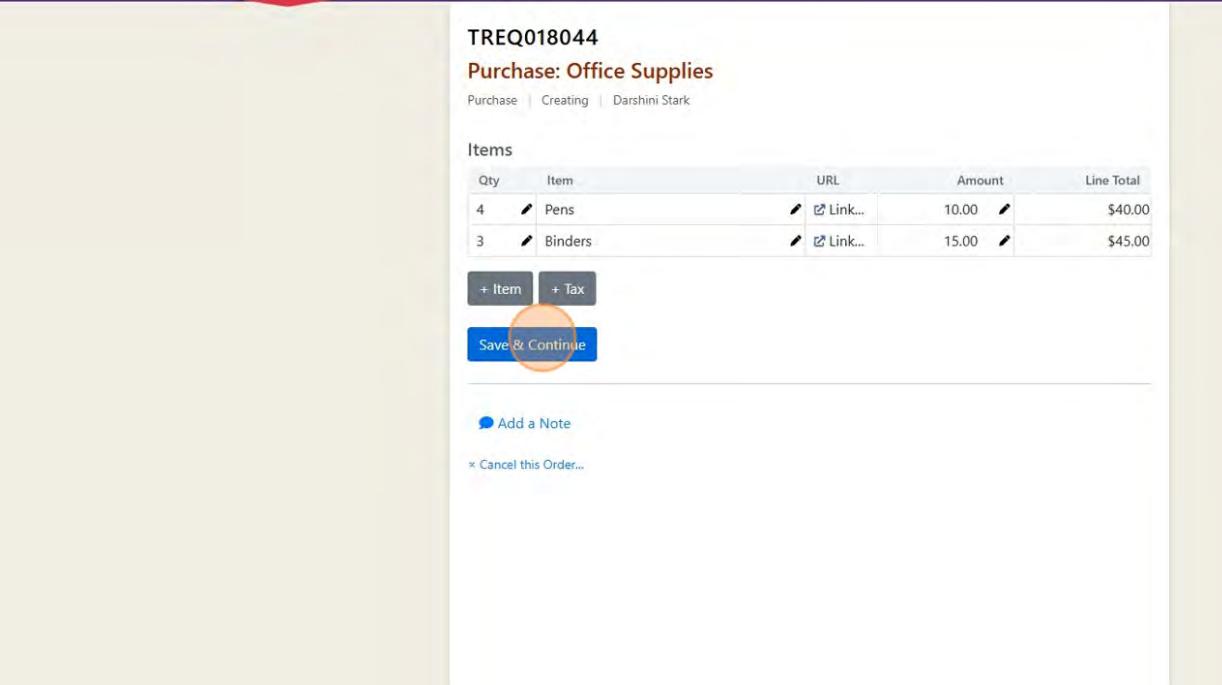
The screenshot shows a purchase order creation interface. The title is 'TREQ018044' and the category is 'Purchase: Office Supplies'. The user is creating a new purchase. The 'Items' table shows one item: 'Pens' with a quantity of 1, an amount of 10.00, and a line total of \$10.00. Below the table are buttons for '+ Item' and '+ Tax'. A modal dialog is open, showing a line item with a quantity of 1, an item 'Binders', an amount of 15, and a line total of \$15.00. The 'Qty' field is highlighted with a red circle. The URL field contains a link to an Amazon product page. At the bottom of the dialog are 'Save', 'Delete', and 'Cancel' buttons, with 'Save' being the active button. Below the dialog are 'Save & Continue' and 'Add a Note' buttons.

11

Click "Save"

The screenshot shows the same purchase order creation interface after the item has been saved. The 'Items' table now shows two items: 'Pens' with a quantity of 1 and a line total of \$10.00, and 'Binders' with a quantity of 3 and a line total of \$45.00. The 'Qty' field for 'Binders' is highlighted with a red circle. The URL field still contains the Amazon link. The 'Save' button is highlighted with a red circle. Below the dialog are 'Save & Continue' and 'Add a Note' buttons, and a 'Cancel this Order...' link at the bottom.

12 Click "Save & Continue"



The screenshot shows a purchase order creation interface. The title is "TREQ018044 Purchase: Office Supplies". The user is "Creating" the purchase and is associated with "Darshini Stark". The "Items" section lists two items: "Pens" and "Binders". The "Save & Continue" button is highlighted with a yellow circle.

Qty	Item	URL	Amount	Line Total
4	Pens	<input checked="" type="checkbox"/> Link...	10.00 <input checked="" type="checkbox"/>	\$40.00
3	Binders	<input checked="" type="checkbox"/> Link...	15.00 <input checked="" type="checkbox"/>	\$45.00

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

[Save & Continue](#)

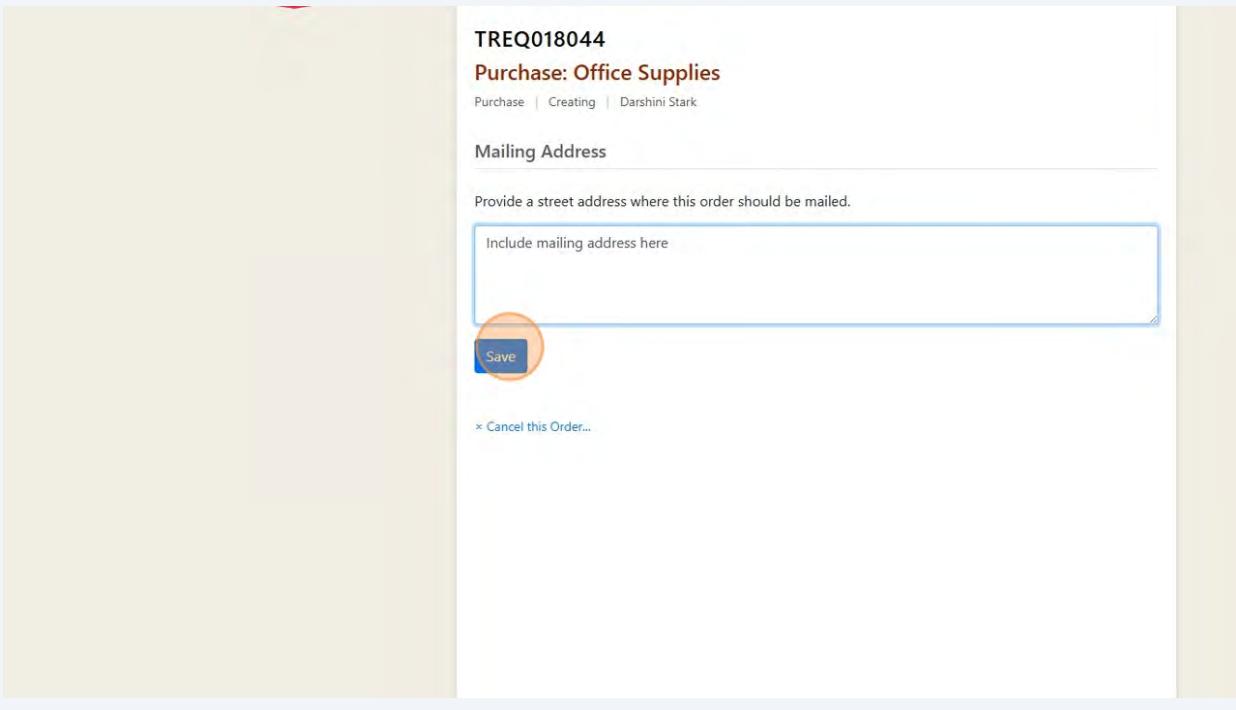
[Add a Note](#)

[Cancel this Order...](#)



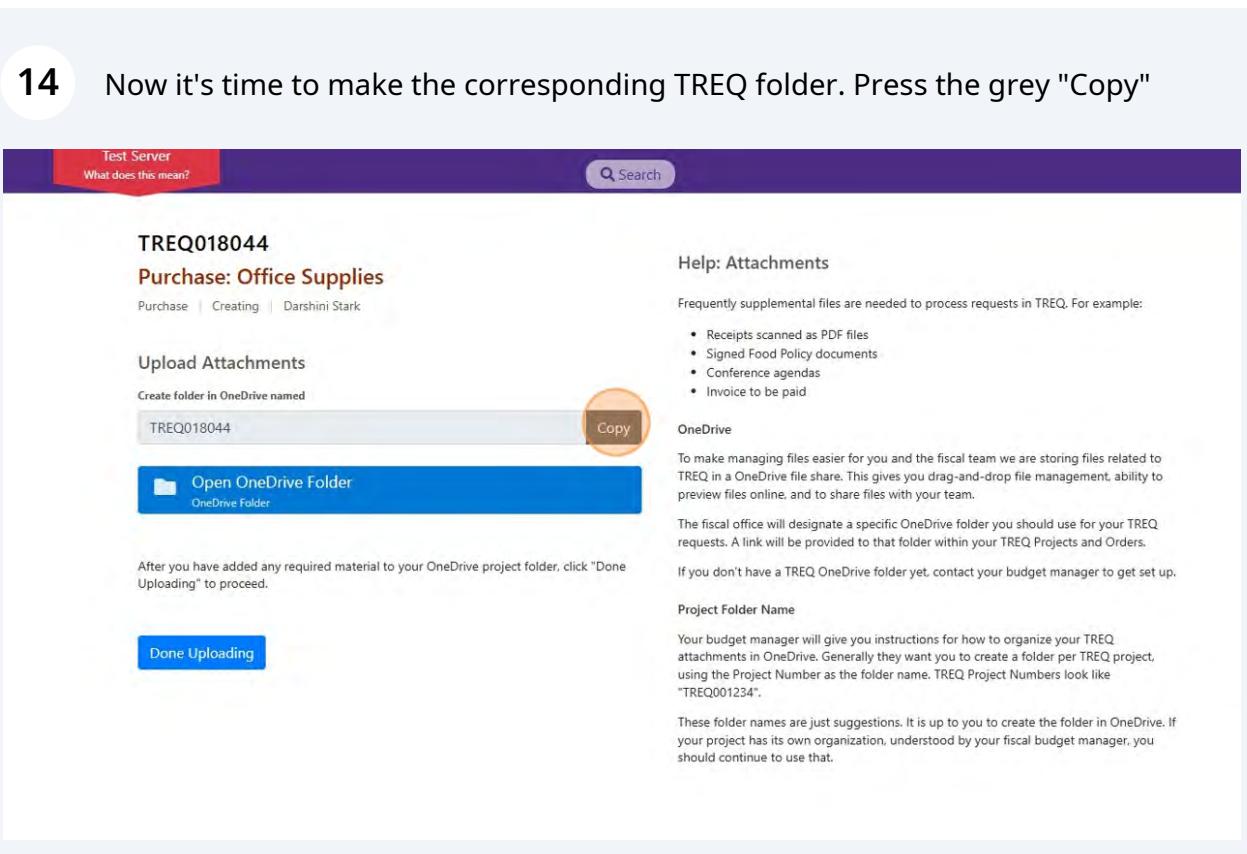
Please note that items must be delivered to a UW business address

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



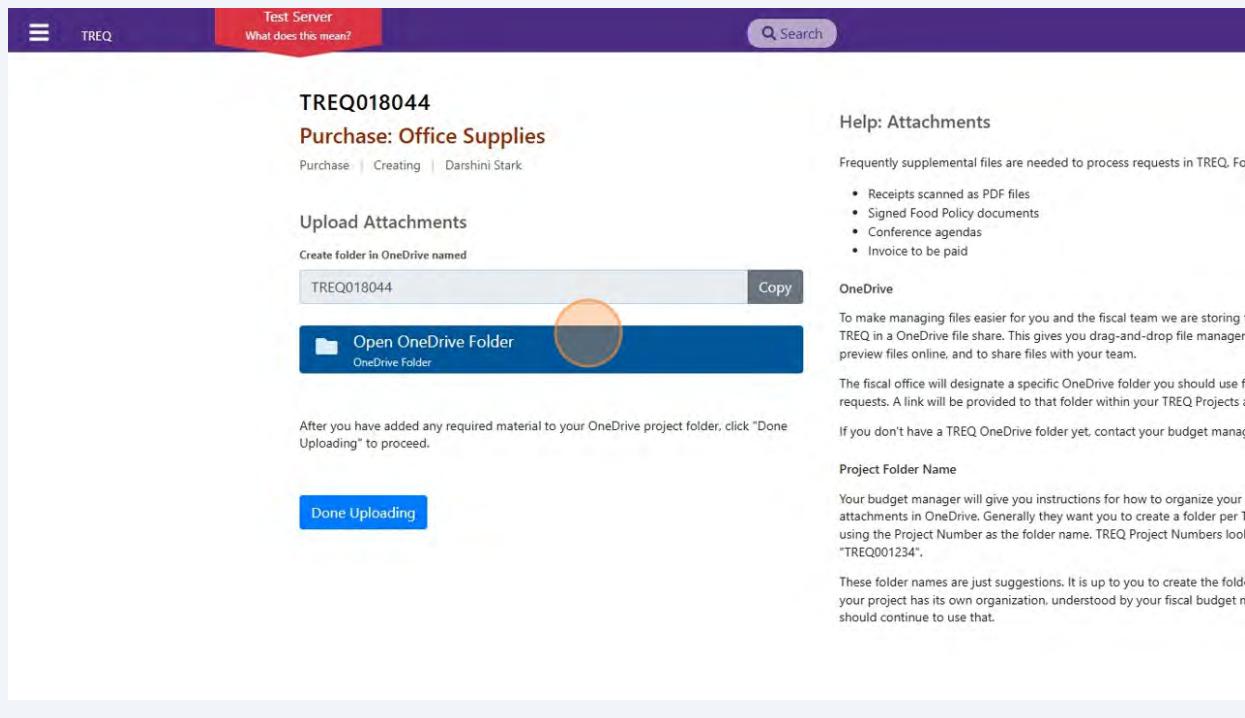
The screenshot shows a web-based application for managing purchases. The page title is "Purchase: Office Supplies" with the identifier "TREQ018044". The user is in the "Creating" state, and the name "Darshini Stark" is listed. A "Mailing Address" section is present, with a placeholder "Include mailing address here" and a "Save" button. A small orange circle highlights the "Save" button. Below the address field is a link to "Cancel this Order...".

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



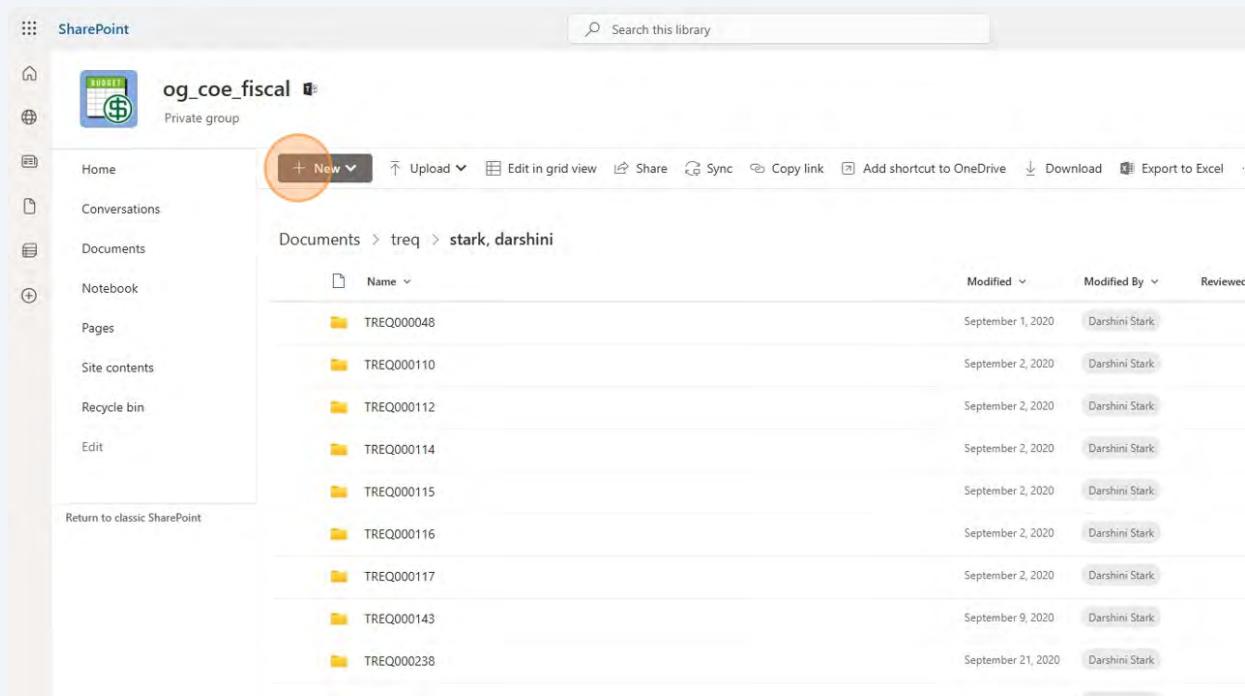
The screenshot shows the same purchase order page as the previous step. The "Purchase: Office Supplies" section is visible. Below it, the "Upload Attachments" section is shown, with a "Create folder in OneDrive named" input field containing "TREQ018044" and a "Copy" button. A small orange circle highlights the "Copy" button. A blue button labeled "Open OneDrive Folder" is also visible. The "Help: Attachments" section provides instructions for using attachments in TREQ, and the "OneDrive" section explains the benefits of using OneDrive for file management. The "Project Folder Name" section provides instructions for naming the folder in OneDrive. The "Done Uploading" button is at the bottom of the attachments section.

15 Click "Open OneDrive Folder"



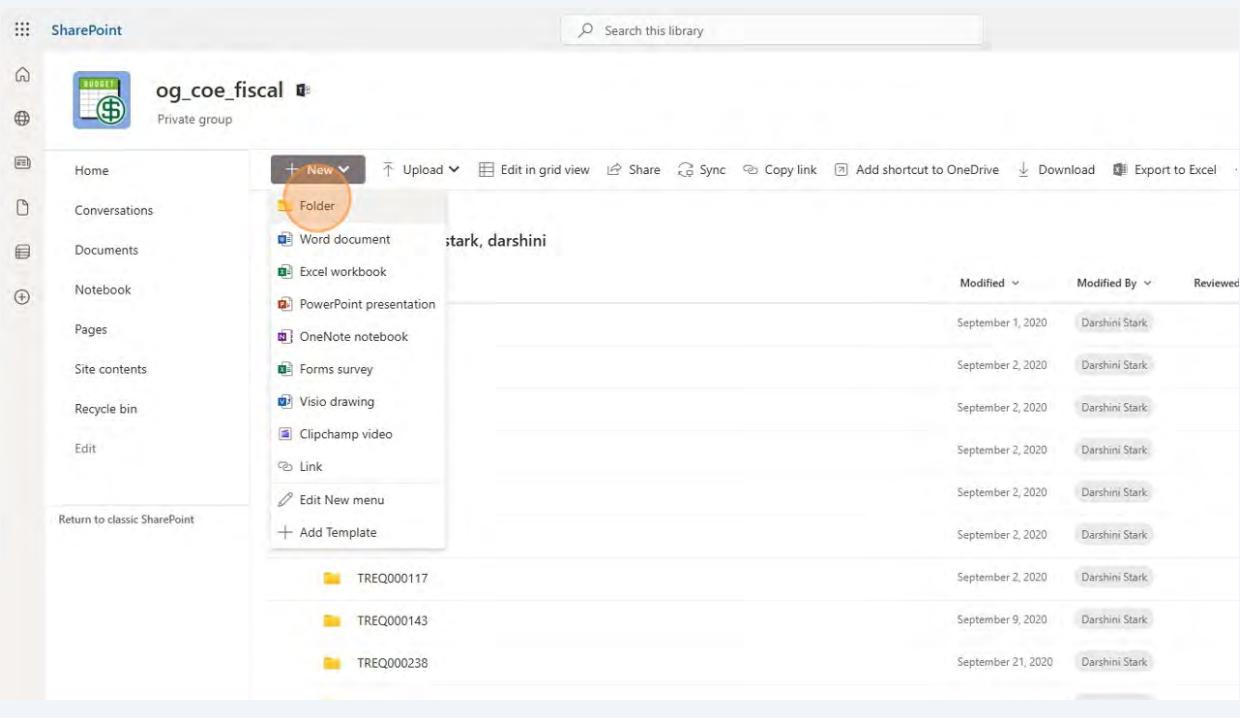
The screenshot shows the TREQ interface for a purchase titled "Purchase: Office Supplies" with the project number TREQ018044. The "Upload Attachments" section is visible, showing a "Create folder in OneDrive named" input field containing "TREQ018044" and a "Copy" button. Below this is a blue button labeled "Open OneDrive Folder" with the sub-label "OneDrive Folder". A yellow circle highlights this button. To the right, there is a "Help: Attachments" section with a list of items and a "OneDrive" section explaining its use for managing files.

16 Click here.

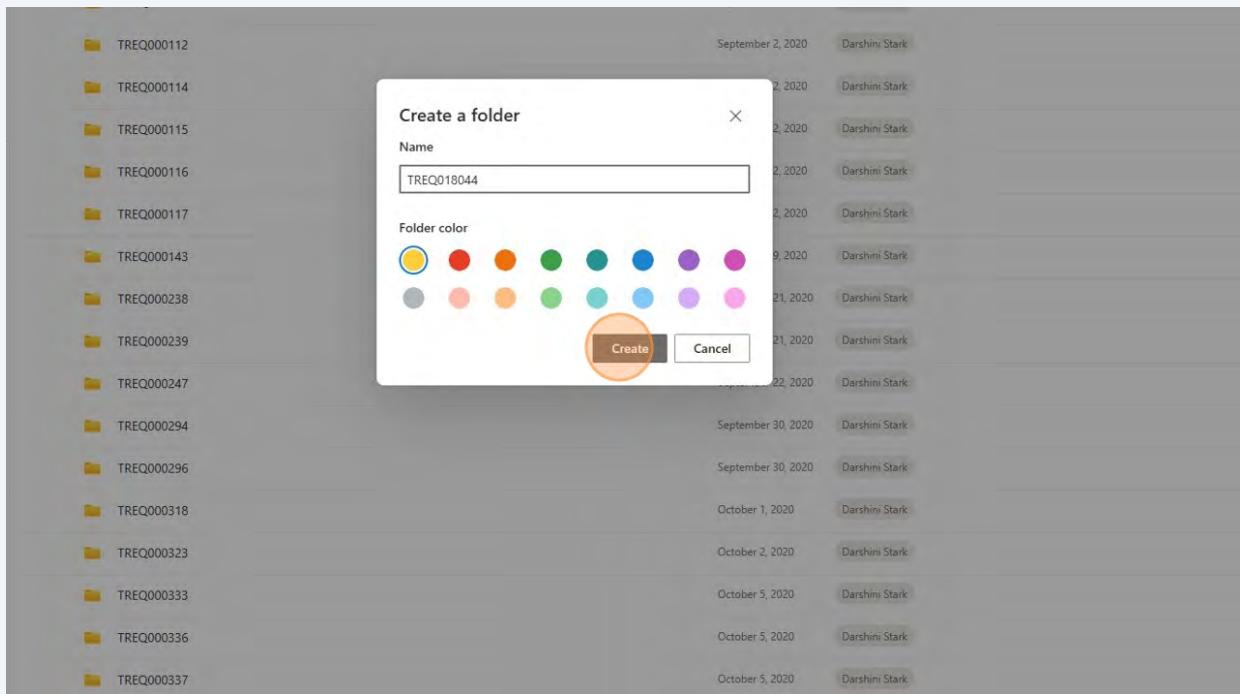


The screenshot shows a SharePoint library named "og_coe_fiscal" (Private group). The left navigation bar includes "Home", "Conversations", "Documents", "Notebook", "Pages", "Site contents", "Recycle bin", and "Edit". The main area shows a breadcrumb path: "Documents > treq > stark, darshini". Below this is a table listing files, with the first column showing folder icons and the second column showing folder names like "TREQ000048", "TREQ000110", etc. A "New" button is highlighted with a yellow circle in the top right of the library header. The table includes columns for "Name", "Modified", "Modified By", and "Reviewed".

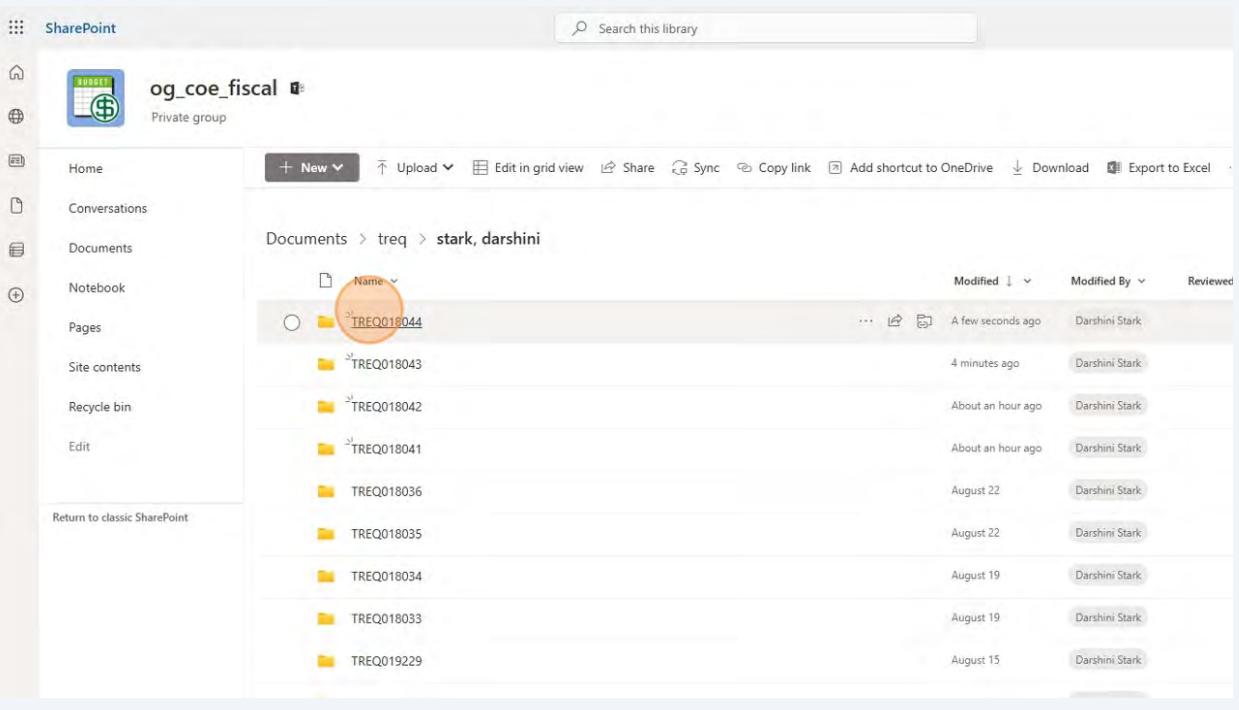
17 Click "Folder"



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



19 Open the folder you just created



SharePoint

og_coe_fiscal Private group

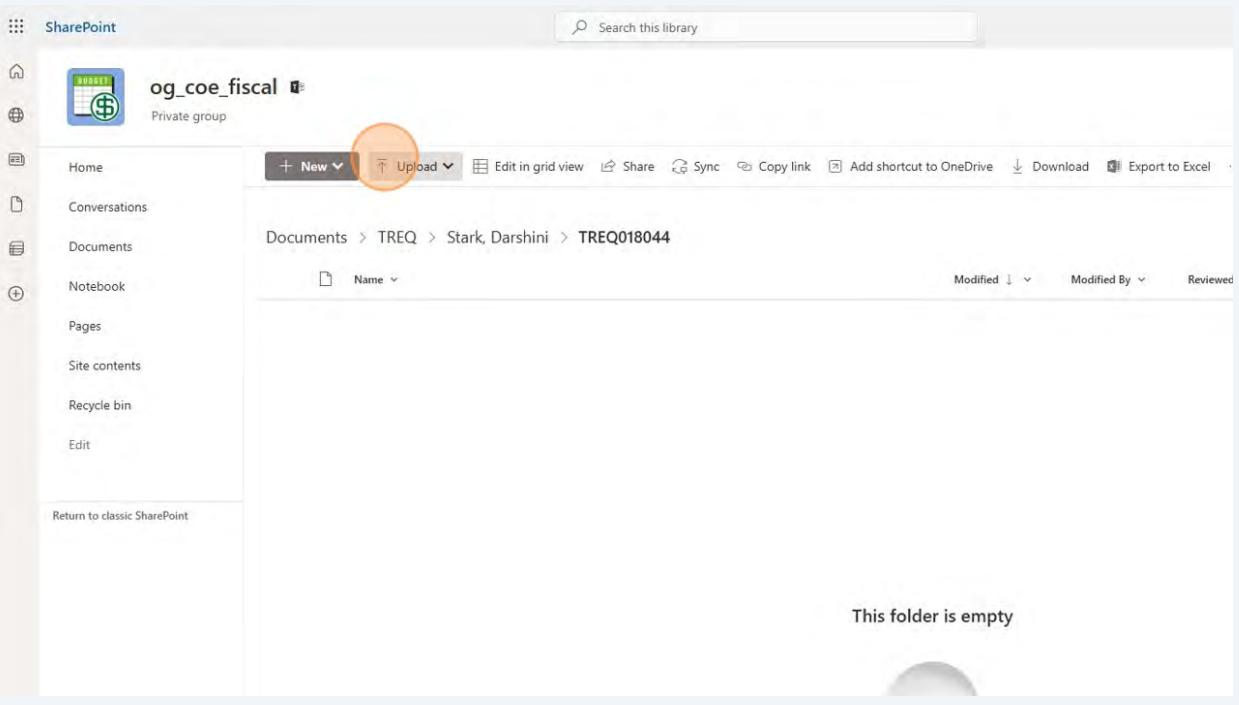
Home Conversations Documents Notebook Pages Site contents Recycle bin Edit

Documents > treq > stark, darshini

Name	Modified	Modified By	Reviewed
TREQ018044	A few seconds ago	Darshini Stark	
TREQ018043	4 minutes ago	Darshini Stark	
TREQ018042	About an hour ago	Darshini Stark	
TREQ018041	About an hour ago	Darshini Stark	
TREQ018036	August 22	Darshini Stark	
TREQ018035	August 22	Darshini Stark	
TREQ018034	August 19	Darshini Stark	
TREQ018033	August 19	Darshini Stark	
TREQ019229	August 15	Darshini Stark	

Return to classic SharePoint

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



SharePoint

og_coe_fiscal Private group

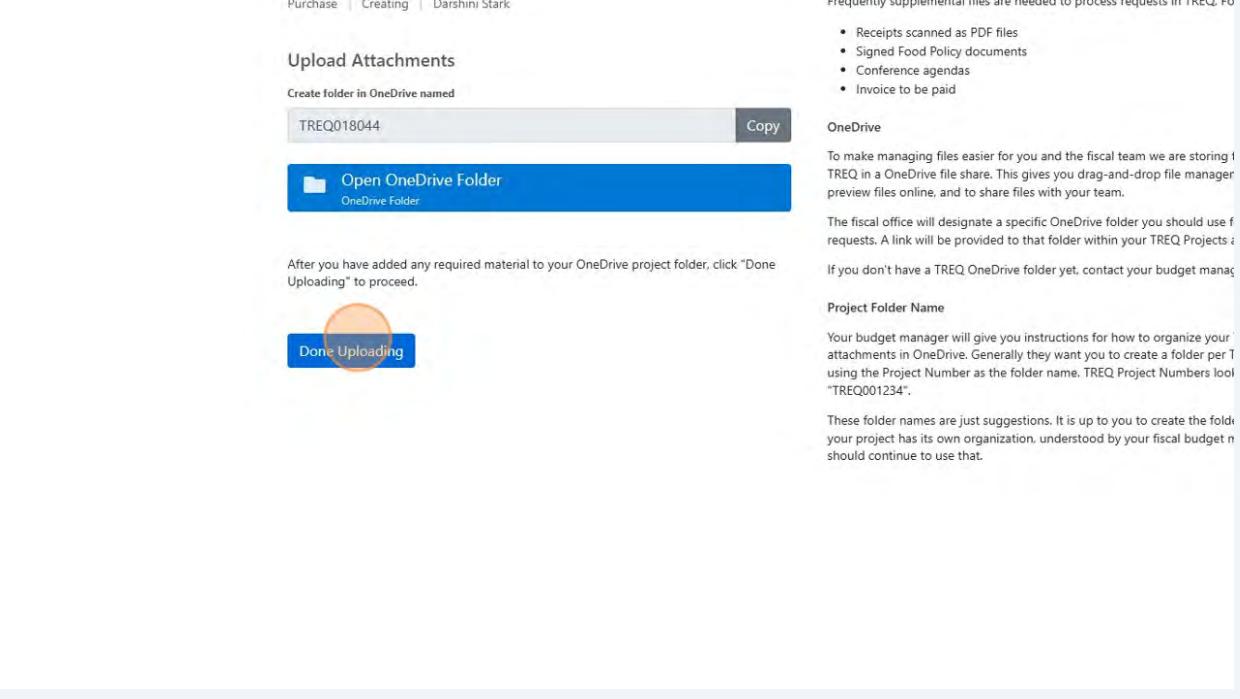
Home Conversations Documents Notebook Pages Site contents Recycle bin Edit

Documents > TREQ > Stark, Darshini > TREQ018044

Name	Modified	Modified By	Reviewed

This folder is empty

21 Click "Done Uploading"



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

Frequently supplemental files are needed to process requests in TREQ. To

- 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.

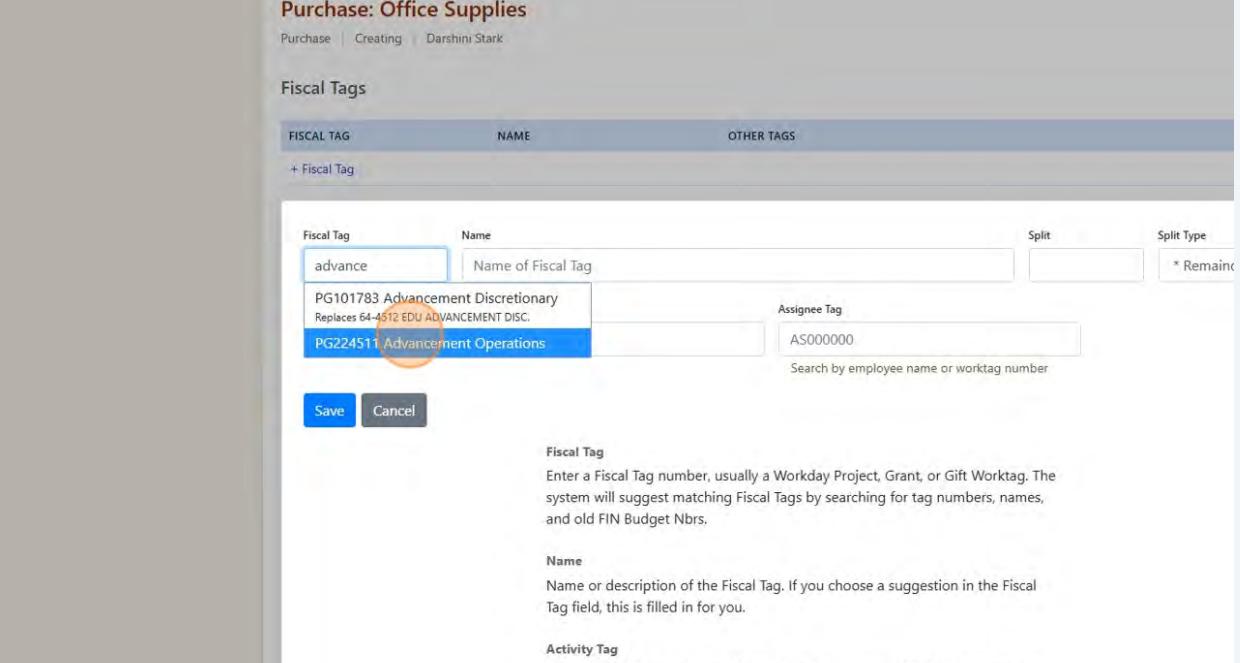
The fiscal office will designate a specific OneDrive folder you should use for requests. A link will be provided to that folder within your TREQ Projects if you don't have a TREQ OneDrive folder yet, contact your budget manager.

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 T 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 your project has its own organization. Understood by your fiscal budget manager to 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 Name Split Split Type * Remaining

advance Name of Fiscal Tag

PG101783 Advancement Discretionary Replaces 64-4512 EDU ADVANCEMENT DISC.

PG224511 Advancement Operations

Assignee Tag AS000000

Search by employee name or worktag number

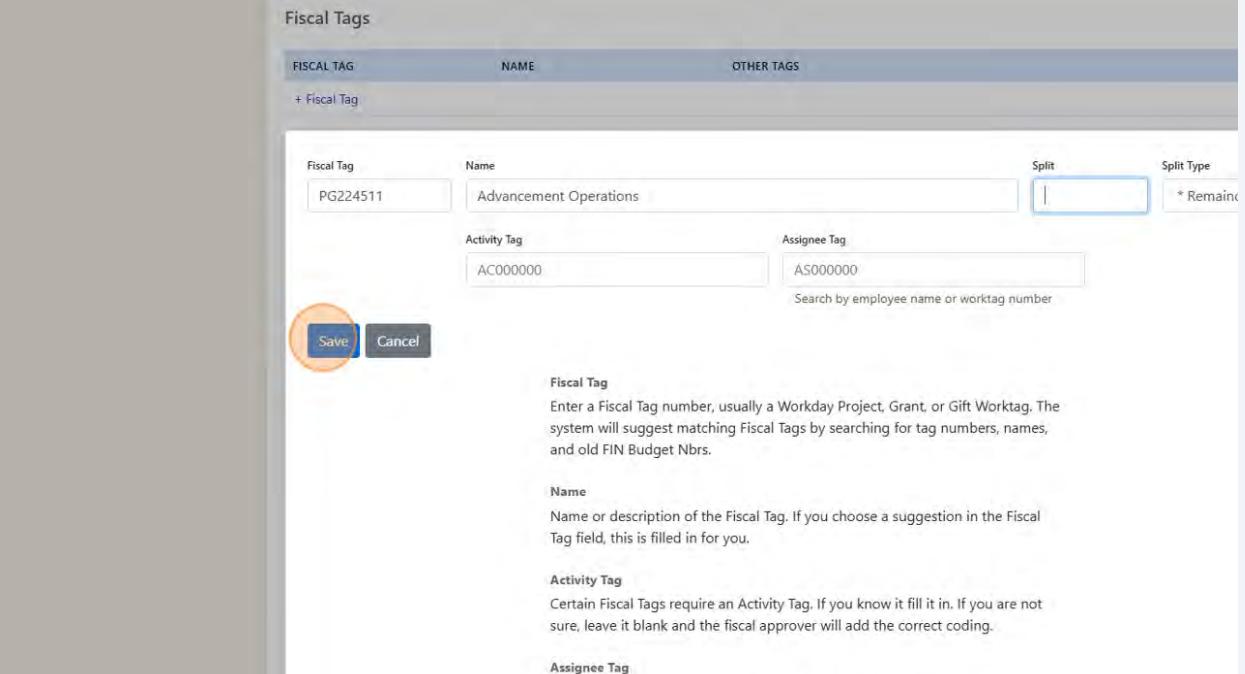
Save Cancel

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.

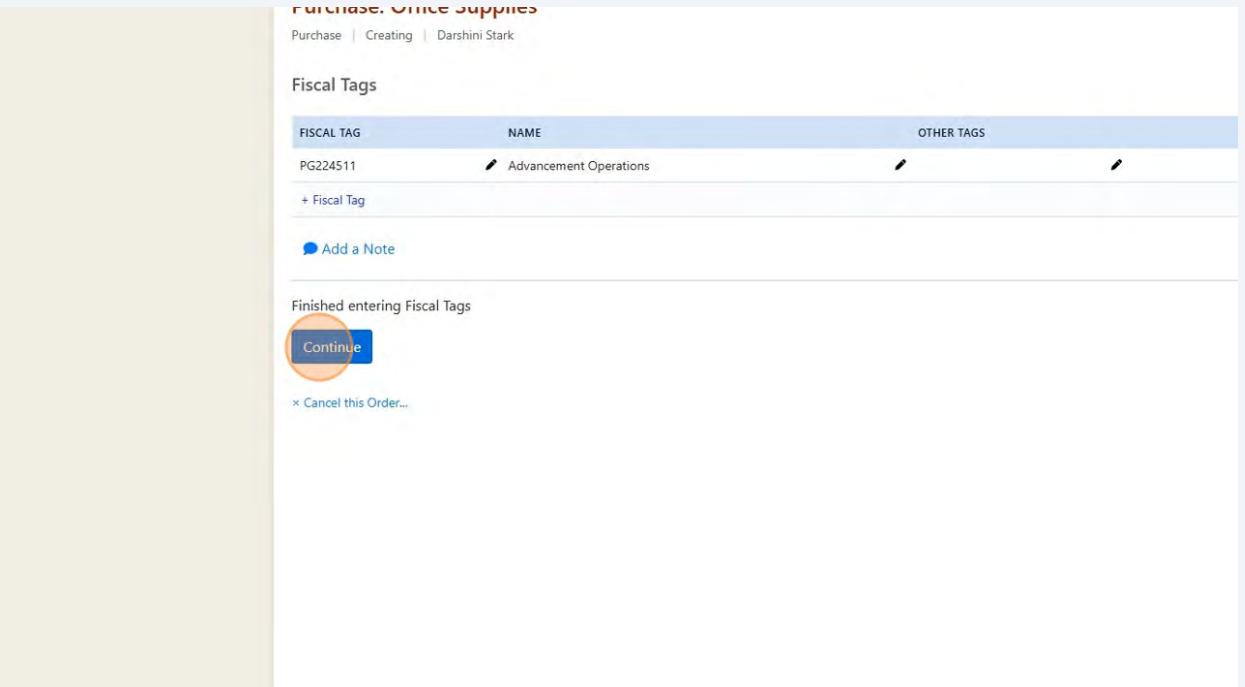
Activity Tag
Certain Fiscal Tags require an Activity Tag. If you know it fill it in. If you are not

23 Click "Save"



The screenshot shows a 'Fiscal Tags' creation form. The 'FISCAL TAG' field contains 'PG224511'. The 'NAME' field contains 'Advancement Operations'. The 'Split' field is empty. The 'Activity Tag' field contains 'AC000000'. The 'Assignee Tag' field contains 'AS000000'. A search bar below the 'Assignee Tag' field says 'Search by employee name or worktag number'. At the bottom left are 'Save' and 'Cancel' buttons, with 'Save' being highlighted with a blue circle. Below the form is a help text and three descriptive sections: 'Fiscal Tag', 'Name', and 'Activity Tag'.

24 Click "Continue"



The screenshot shows a 'Purchase, Office Supplies' screen. The 'Purchase' tab is selected. The 'Fiscal Tags' section shows a table with one row: 'FISCAL TAG' 'PG224511', 'NAME' 'Advancement Operations', and 'OTHER TAGS' empty. Below the table is a note 'Finished entering Fiscal Tags' and a 'Continue' button, which is highlighted with a blue circle. There is also a link 'Cancel this Order...'.

25 Review the TREQ before submitting it

Project Owner
Darshini Stark

Business Purpose
Need to purchase office supplies for advancement

Items

ITEM	AMOUNT
Pens (4 x 10.00)	\$40.00
Binders (3 x 15.00)	\$45.00
	Total \$85.00

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 relevant budgets.

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...

Contact • Help • Privacy • Terms
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