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/**

2 Click "Make a Purchase"

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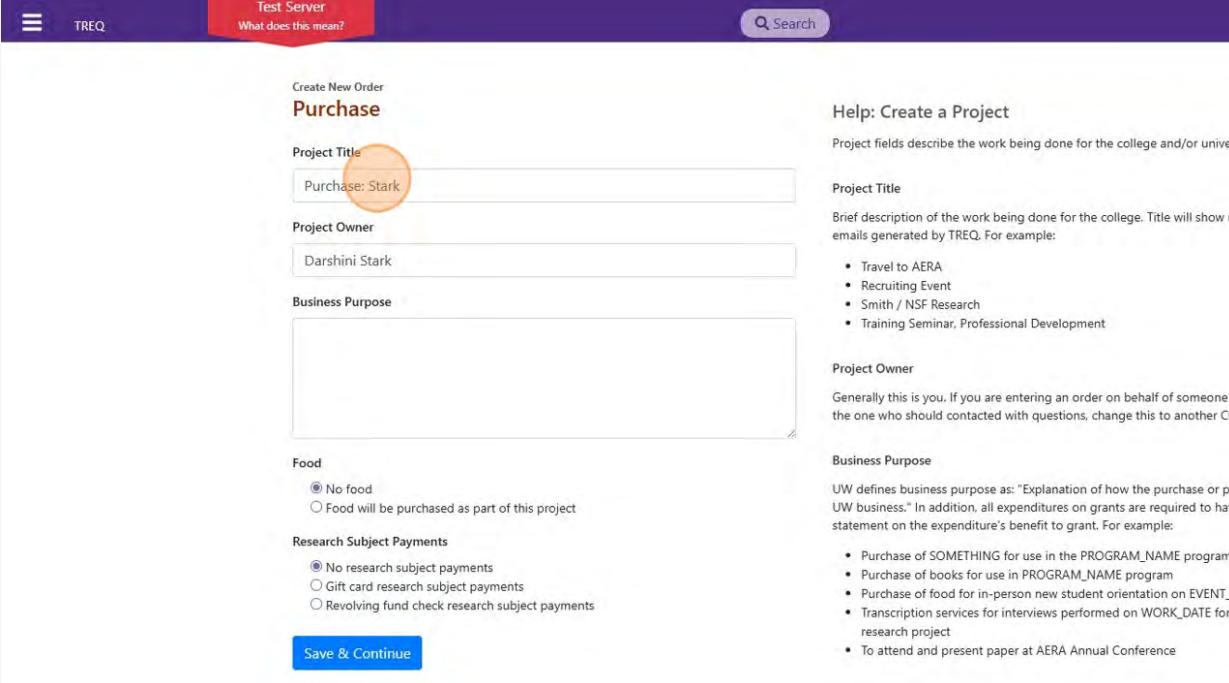
4 Update the "Business Purpose" field.

5 Click "Save & Continue"

6 Click "+ Item" to add a line item for the invoice
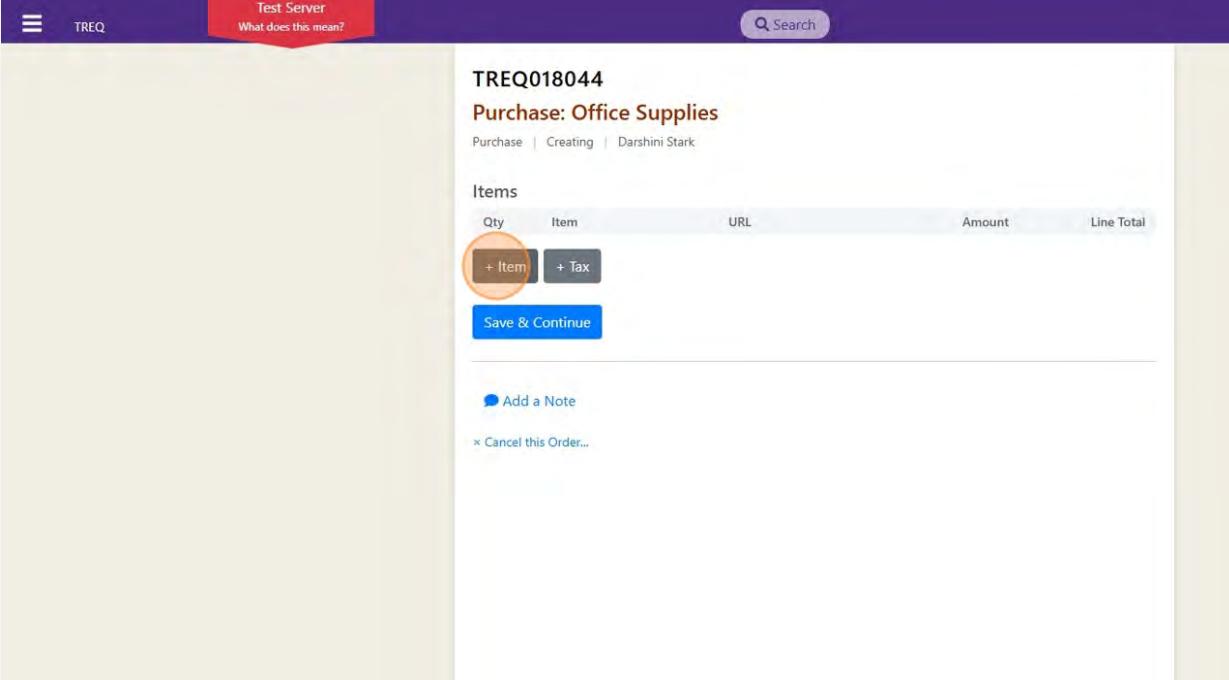
7 Update the "Item" field with what needs to be purchased.

8   Update "Amount" field with the per item cost
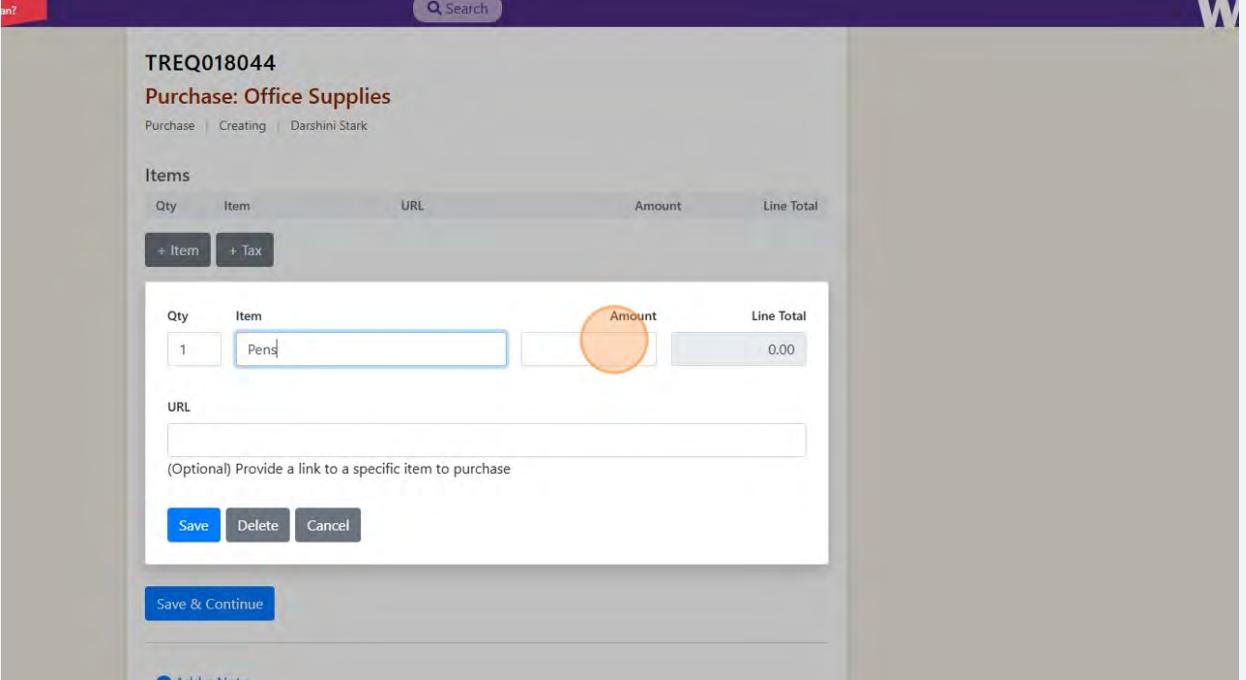
9   If there is a specific item being requested, add a link in the URL field.
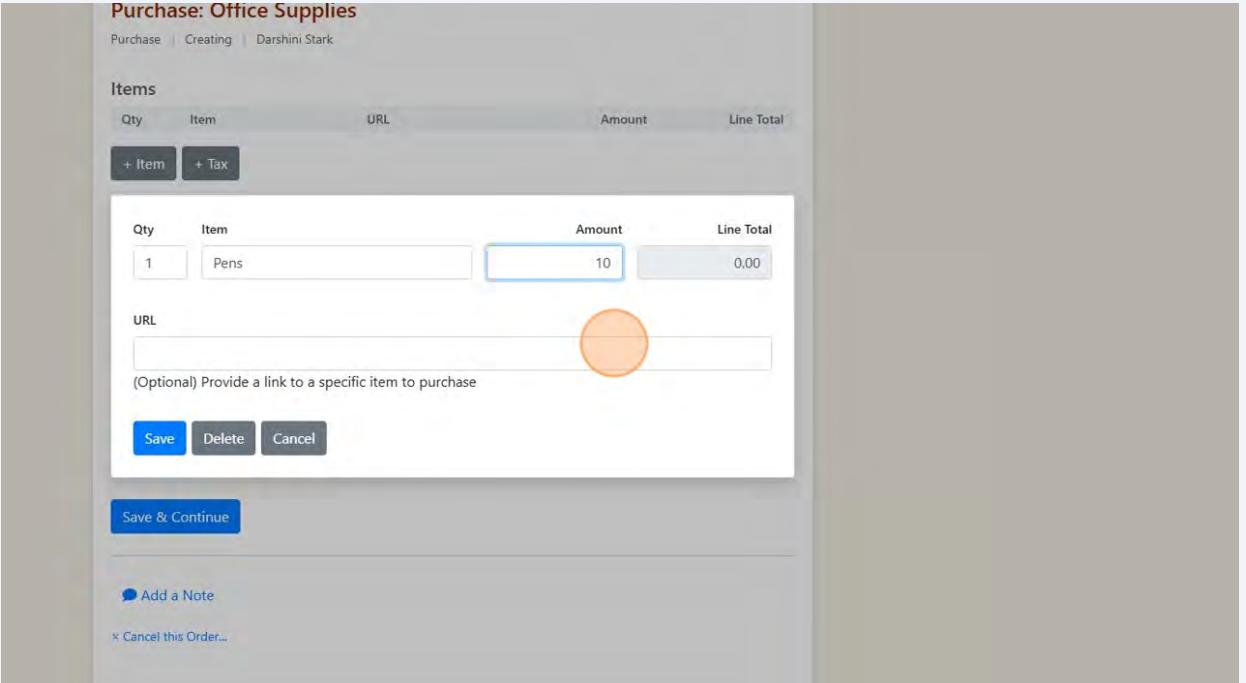
10 Update the "Qty" field with the amount of that item to purchase. It will calculate the Line Item total

11 Click "Save"

12 Click "Save & Continue"

TREQ018044

Purchase: Office Supplies

Purchase | Creating | Darshini Stark

Items

Qty		Item		URL	Amount		Line Total
4	✏	Pens	✏	☑ Link...	10.00	✏	$40.00
3	✏	Binders	✏	☑ Link...	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.
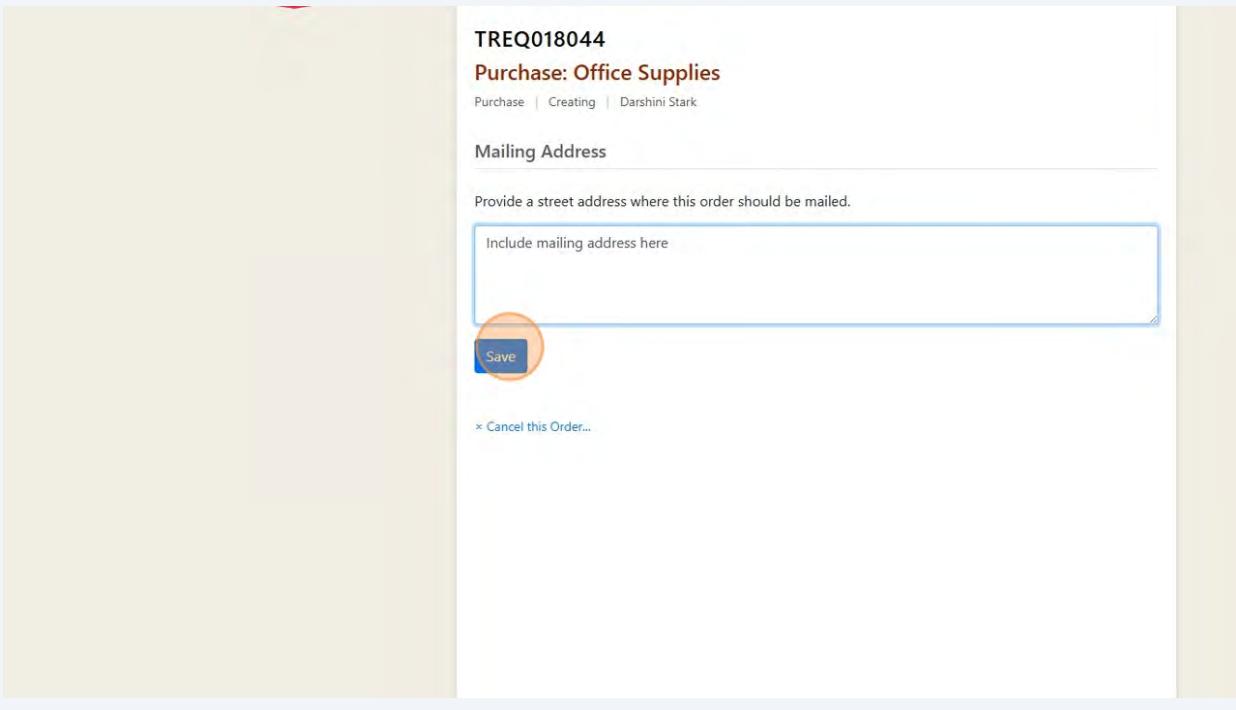
TREQ018044
Purchase: Office Supplies
Purchase | Creating | Darshini Stark

Mailing Address

Provide a street address where this order should be mailed.

Include mailing address here

Save

× Cancel this Order...

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

Test Server
What does this mean?

Q Search

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 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.

15   Click "Open OneDrive Folder"
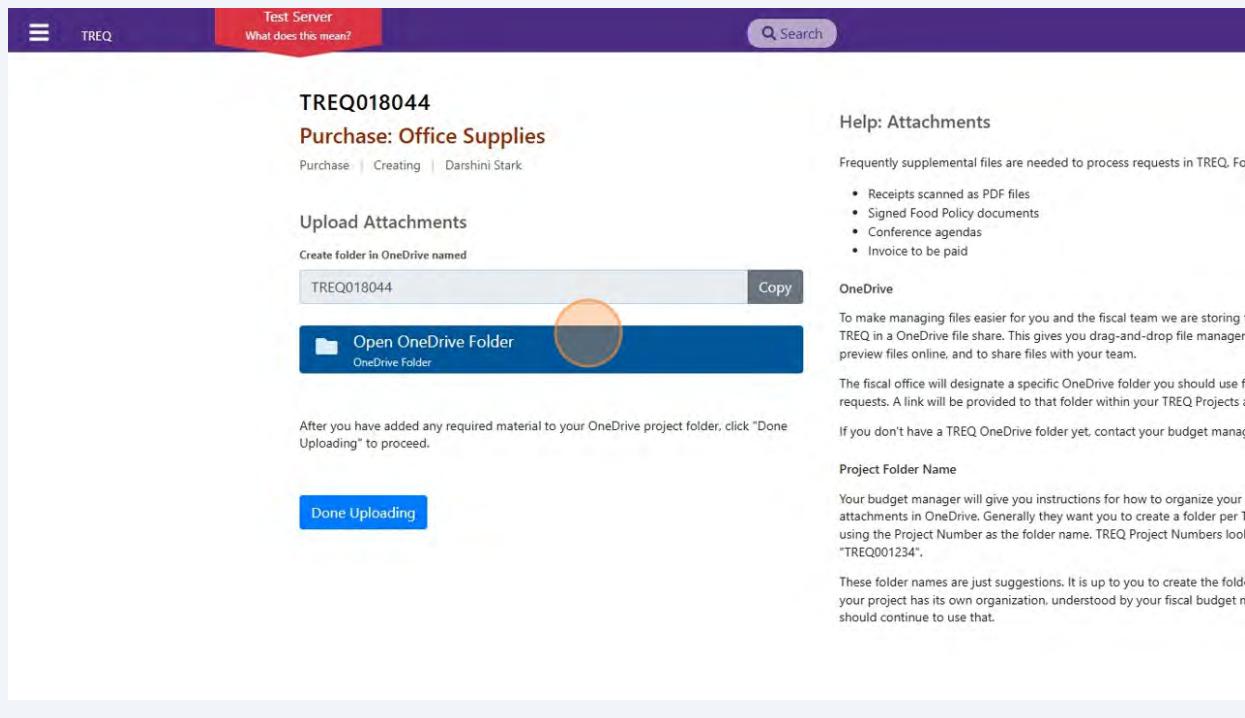
Test Server
What does this mean?

TREQ

Q Search

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. Fo

- 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 f
requests. A link will be provided to that folder within your TREQ Projects i

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

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 lool
"TREQ001234".

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

---

16   Click here.

⋮⋮⋮ SharePoint

🔍 Search this library
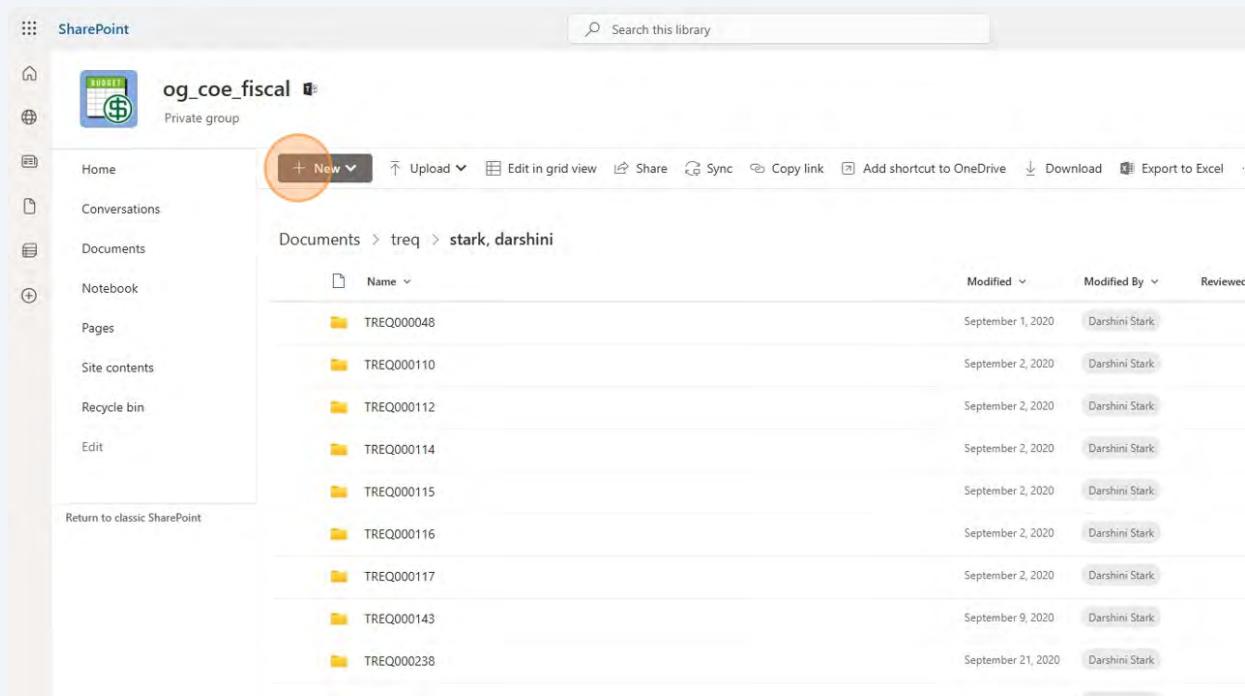
og_coe_fiscal
Private group

🏠 Home
🌐
✉️
📄
📁
➕

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"
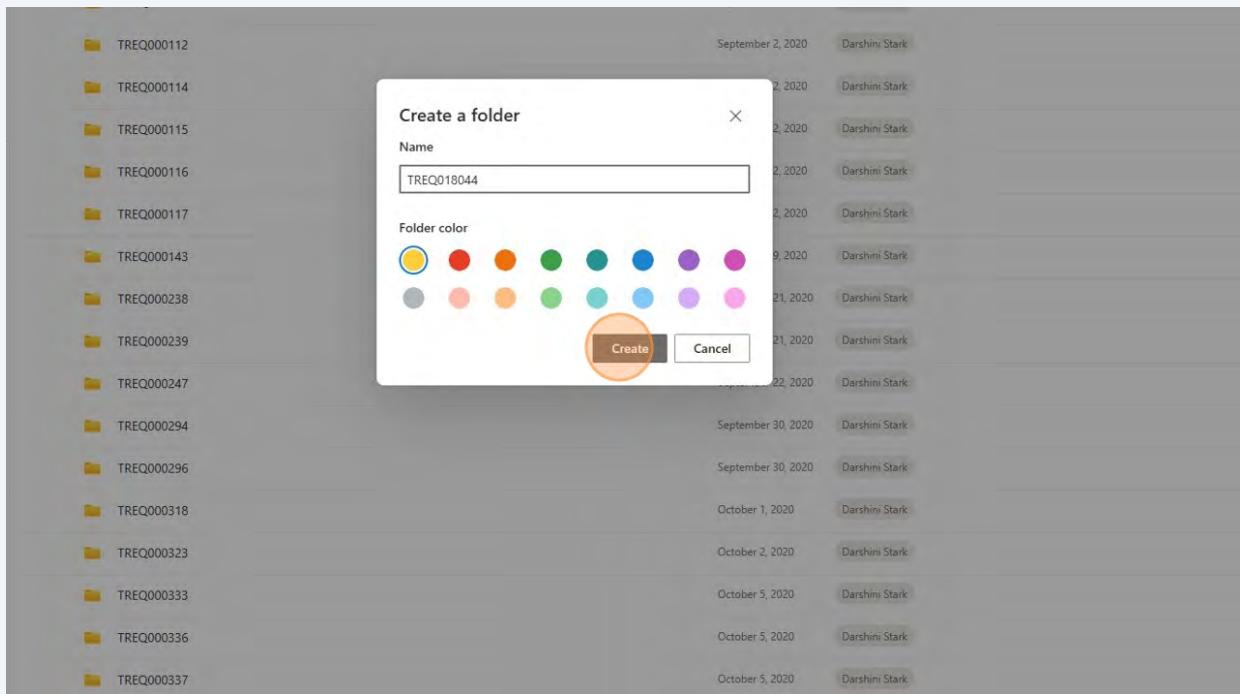
19 Open the folder you just created

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

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. Fo

- 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 f
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 f
requests. A link will be provided to that folder within your TREQ Projects a

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

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
"TREQ001234".

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

---

22 In the "Fiscal Tag" box, type in the number or name of the fund that will be used
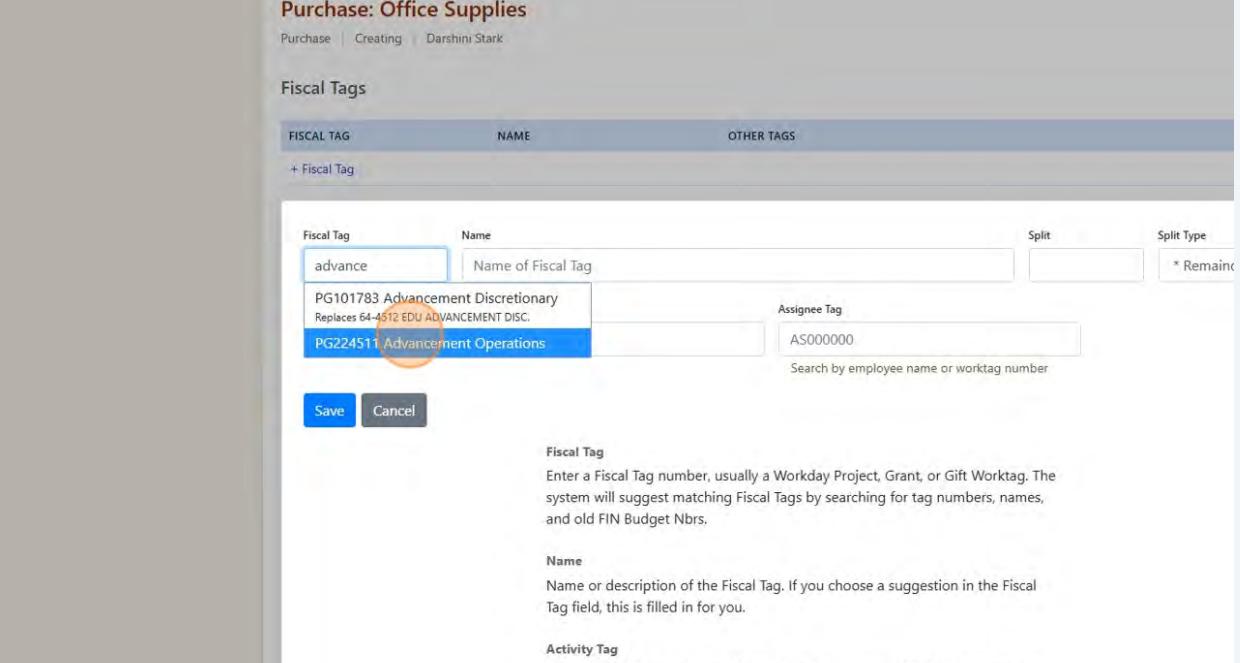
Purchase: Office Supplies
Purchase | Creating | Darshini Stark

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS

+ Fiscal Tag

Fiscal Tag	Name	Split	Split Type
advance	Name of Fiscal Tag		* Remainc

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"

Fiscal Tags

FISCAL TAG	NAME	OTHER TAGS
+ Fiscal Tag		

Fiscal Tag
PG224511

Name
Advancement Operations

Split

Split Type
* Remaind

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"

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

Business Purpose
Need to purchase office supplies for advancement

Items

		Change Items
ITEM		AMOUNT
Pens (4 x 10.00)	☑ Link...	$40.00
Binders (3 x 15.00)	☑ Link...	$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...

✉ Contact • Help • Privacy • Terms
©2025 UW College of Education, Seattle, Washington