# TREQ: Filing out a Travel Pre-Authorization Form

This guide provides step-by-step instructions on how to fill out a Travel Pre-Authorization form. It covers different scenarios such as COE Traveler, UW Traveler (Other Unit), and Non UW Traveler. The guide also explains how to add travel items, create a TREQ folder, and add a budget number or fiscal tag. By following this guide, users can easily complete and submit their Travel Pre-Authorization form.

1   Navigate to **https://educ.uw.edu/treq/**

2   Before traveling, please fill out a "Travel Pre-Authorization" form in TREQ. Star by navigating to TREQ and press "Travel Pre-Authorization".
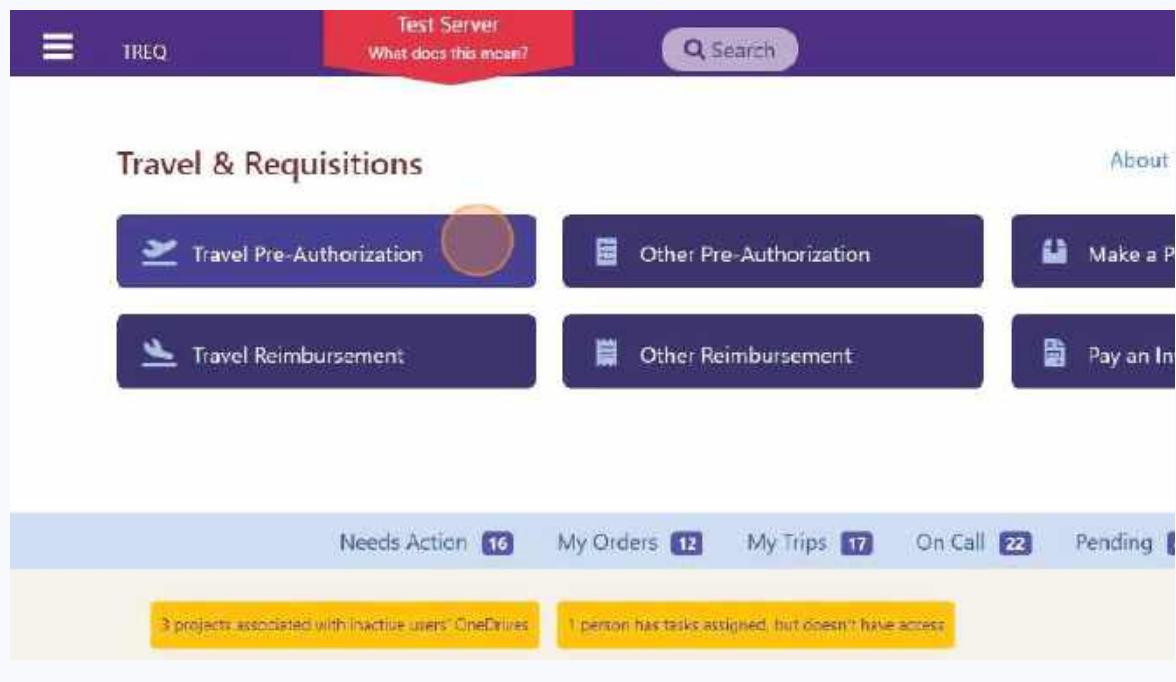
COE TRAVELER

3 Under Traveler Affiliation, "COE Traveler" will be automatically selected. The name of the person filling out the form will also auto populate in the "Traveler" box.

Traveler Affiliation

- ● COE Traveler (Faculty, Staff, or Student employee)
- ○ UW Traveler (Other Unit)
- ○ Non UW Traveler

Traveler (College of Education)

Darshini Stark

Destination

Provide a summary of your trip. This trip des Authorization and Reimbursement orders.

Traveler

Use Affiliation to choose category of travele

For a **COE Traveler** use the provided person s faculty, staff, or student employee. For other traveler's name and contact information.

Use "Non UW Traveler" for UW students who

Departure Date   **Return Date**

mm/dd/yyyy   mm/dd/yyyy

Honorarium

Honorarium is only an option for Non-UW T traveler affiliation, optional Honorarium field

Business Purpose

Business Purpose

UW defines business purpose as: "Explanatio used for UW business." In addition, all expen have an additional statement on the expendi

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4 If you are filling it out on behalf of another COE Traveler, please update the "Traveler" box to their name by typing in the name of the traveler and selecting the correct pop up option.

Travel Pre-Authorization

Help: Cre

Traveler Affiliation

- ● COE Traveler (Faculty, Staff, or Student employee)
- ○ UW Traveler (Other Unit)
- ○ Non UW Traveler

Provide a sur and Reimbur

Traveler

Traveler (College of Education)

Darshini Stark

Destination

Use Affiliatic

For a COE Tr student emp information.

Use "Non UW

Departure Date   **Return Date**

mm/dd/yyyy   mm/dd/yyyy

Honorarium

Honorarium affiliation, op

Business Purpose

Business Pur

Travel Pre-Authorization

Traveler Affiliation

- ● COE Traveler (Faculty, Staff, or Student employee)
- ○ UW Traveler (Other Unit)
- ○ Non UW Traveler

Traveler (College of Education)

| Darshini Stark |

Stark, Darshini (dmestark)

| |

Departure Date

| mm/dd/yyyy □ |

Return Date

| mm/dd/yyyy □ |

Business Purpose

| |

Provide a sur
and Reimbur

Traveler

Use Affiliatic

For a COE Tr
student emp
information.

Use "Non UV

Honorarium

Honorarium
affiliation, op

Business Pur

UW defines t
UW business

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5 Update the "Destination" field.

Traveler Affiliation

- ● COE Traveler (Faculty, Staff, or Student employee)
- ○ UW Traveler (Other Unit)
- ○ Non UW Traveler

Traveler (College of Education)

| Stark, Darshini (dmestark) ✔ |

Destination

| | |

Departure Date

| mm/dd/yyyy □ |

Return Date

| mm/dd/yyyy □ |

Business Purpose

| |

Provide a sur
and Reimbur

Traveler

Use Affiliatic

For a COE Tr
student emp
information.

Use "Non UV

Honorarium

Honorarium
affiliation, op

Business Pur

UW defines t
UW business
statement or

Travel Pre Authorization

Traveler Affiliation

- ● COE Traveler (Faculty, Staff, or Student employee)
- ○ UW Traveler (Other Unit)
- ○ Non UW Traveler

Traveler (College of Education)

| Stark, Darshini (dmestark) | ✓ |

Destination

Las Vegas, NV

| Departure Date | | Return Date | |
| mm/dd/yyyy | 🗓 | mm/dd/yyyy | 🗓 |

Business Purpose

6 Then input the "Departure" and "Return" dates by clicking on the calendar icon. Click the "Return Date" field.

○ Non UW Traveler

Traveler (College of Education)

Darshini Stark

Destination

Las Vegas, NV

| Departure Date | | Return Date | |
| mm/dd/yyyy | 🗓 | mm/dd/yyyy | 🗓 |

Business Purpose

Personal Time

r (College of Education)

shini Stark

ation

Vegas, NV

ture Date		Return Date	
05/2024	🗓	mm/dd/yyyy	🗓

ss Purpose

al Time

Traveler

Use Affiliation to choose category of traveler.

For a COE Traveler use the provided person search to pick faculty, staff, or student employee. For other traveler affilia traveler's name and contact information.

Use "Non UW Traveler" for UW students who are not curre

Honorarium

Honorarium is only an option for Non-UW Travelers. Whe traveler affiliation, optional Honorarium field shows up.

Business Purpose

UW defines business purpose as: "Explanation of how the used for UW business." In addition, all expenditures on gra have an additional statement on the expenditure's benefit

How is this trip serving UW / grant business?

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7 Please be sure to provide a business purpose that explains how this trip is serving UW business or the grant.

Traveler (College of Education)

Darshini Stark

Destination

Las Vegas, NV

Departure Date		Return Date	
08/05/2024	🗓	08/08/2024	🗓

Business Purpose

Personal Time

⦿ No

Use Affiliation to choose category of traveler

For a COE Traveler use the provided person s faculty, staff, or student employee. For other traveler's name and contact information.

Use "Non UW Traveler" for UW students who

Honorarium

Honorarium is only an option for Non-UW T traveler affiliation, optional Honorarium field

Business Purpose

UW defines business purpose as: "Explanatio used for UW business." In addition, all expen have an additional statement on the expendi

How is this trip serving UW / grant business?

Personal time? If not, skip to step (11)

8 If you will have personal time on a trip, select "Yes, will use time-off during trip" under the "Personal Time" section

9 Fill out the Location section

10 Then in the "Star Date/Time" and "End Date/Time" please use the calendar to select dates, and the clock to select the times.

For example, if you plan to stay longer at your location to sight see, personal time would start after the conference ends till the time you leave to board your flight home. For more details on Personal Time, please visit the UW Travel Services website: **https://finance.uw.edu/travel/personal**

Click "Save & Continue"

statement on the expenditure's benefit to grant.

How is this trip serving UW / grant business?

e time-off during trip

Las Vegas, NV

Time	08/07/2024	🗓	▮ -- --	🕐
ime	08/08/2024	🗓	--:-- --	🕐

Clear Personal Time 1

Time	mm/dd/yyyy	🗓	--:-- --	🕐
ime	mm/dd/yyyy	🗓	--:-- --	🕐

Clear Personal Time 2

How is this trip serving UW / grant business?

ng trip

egas, NV

7/2024	🗓	04:00 PM	🕐
8/2024	🗓	--:-- --	🕐

Personal Time 1

dd/yyyy	🗓	--:-- --	🕐
dd/yyyy	🗓	--:-- --	🕐

Personal Time 2

How is this trip serving UW / grant business?

se time-off during trip

	Las Vegas, NV			
Time	08/07/2024	🗓	04:00 PM	⊙
Time	08/08/2024	🗓	▮-- --	⊙

Clear Personal Time 1

Time	mm/dd/yyyy	🗓	--:-- --	⊙
Time	mm/dd/yyyy	🗓	--:-- --	⊙

Clear Personal Time 2

UW business." In addition, all expenditures on grants are required to statement on the expenditure's benefit to grant.

How is this trip serving UW / grant business?

during trip

	as Vegas, NV			
	08/07/2024	🗓	04:00 PM	⊙
	08/08/2024	🗓	06:45 PM	⊙

lear Personal Time 1

	mm/dd/yyyy	🗓	--:-- --	⊙
	mm/dd/yyyy	🗓	--:-- --	⊙

1	Location	Las Vegas, NV			
	Start Date/Time	08/07/2024	□	04:00 PM	⊘
	End Date/Time	08/08/2024	□	06:45 PM	⊘
		Clear Personal Time 1			
2	Location				
	Start Date/Time	mm/dd/yyyy	□	--:-- --	⊘
	End Date/Time	mm/dd/yyyy	□	--:-- --	⊘
		Clear Personal Time 2			

Save & Continue

No Personal Time

11 If you do not have personal time, click "Save & Continue"

08/05/2024	□	08/08/2024	□

Honorarium is only an option for Non-UW tr
traveler affiliation, optional Honorarium field

Business Purpose

Attenting a conference and presenting research

Business Purpose

UW defines business purpose as: "Explanatio
used for UW business." In addition, all expen
have an additional statement on the expendi

How is this trip serving UW / grant business?

Personal Time

⦿ No
○ Yes, will use time-off during trip

Save & Continue

UW Traveler (Other Unit)

12 If you are filling out the form for another traveler that is a UW employee but not with the College of Education, select "UW Traveler (Other Unit)".

13 Type their name into the "Name" field.
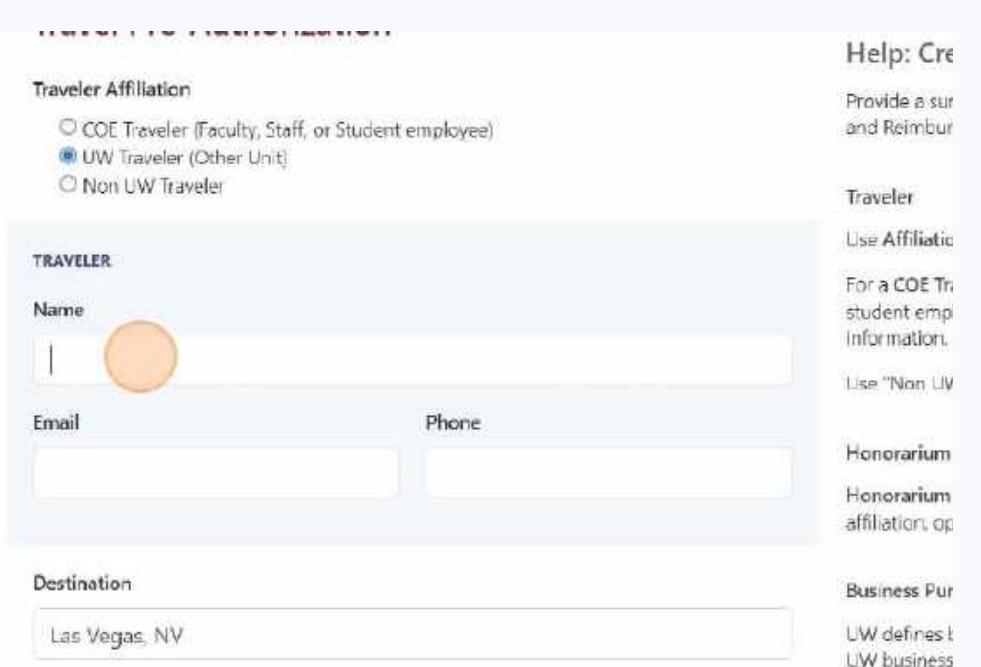
14 Please include contact information in the "Email" and "Phone" fields.

UW Traveler (Other Unit)
Non UW Traveler

Traveler

TRAVELER

Use Affiliatic

Name

For a COE Tr
student emp
information.

Stark, Darshini

Use "Non UV

Email   Phone

Honorarium

Honorarium
affiliation, op

Destination

Business Pur

Las Vegas, NV

UW defines l
UW business
statement or

Departure Date   Return Date

08/05/2024   🗓   08/08/2024   🗓

How is this t

-Authorization

Help: Create a Trip

er (Faculty, Staff, or Student employee)
r (Other Unit)
aveler

Provide a summary of your trip. This trip description will be
and Reimbursement orders.

Traveler

Use Affiliation to choose category of traveler.

For a COE Traveler use the provided person search to pick /
student employee. For other traveler affiliation, enter the tr
information.

ii

Use "Non UW Traveler" for UW students who are not currer

Phone

Honorarium

w.edu

310-710-3850

Honorarium is only an option for Non-UW Travelers. When
affiliation, optional Honorarium field shows up.

Business Purpose

Non UW Traveler

15   Click the "Non UW Traveler" field.

16   Fill out the traveler information.

17   If they will be receiving an honorarium, please check the "Honorarium" box.

Name

Darshini Stark

Email

dmestark@gmail.com

Phone

310-710-3850

☐ Honorarium

Destination

Las Vegas, NV

Departure Date

08/05/2024

Return Date

08/08/2024

18   Fill in the amount to be recevied in the "Honorarium Amount" field.

Email

dmestark@gmail.com

Phone

310-710-3850

☑ Honorarium

Honorarium Amount

Destination

Las Vegas, NV

Departure Date

08/05/2024

Return Date

08/08/2024

19 Click the "Destination", "Departur Date", "Return Date", and "Business Purpose" must also be filled out. These sections are the same for all traveler types.

☑ Honorarium

Honorarium Amount

150

Business Pur

UW defines
UW business
statement or

How is this tr

Destination

Las Vegas, NV

Departure Date

08/05/2024

Return Date

08/08/2024

Business Purpose

Attending a conference and presenting research

20 If there is no personal time, click "Save & Continue". If there is personal time, please refer back to that section at step 8.

Business Purpose

Attending a conference and presenting research

Personal Time

● No
○ Yes, will use time-off during trip

Save & Continue

21 Non UW Travelers require a few extra questions. Please be sure to accurely fill this out and provide the UW Privacy Notice link to the traveler for their review.

TREQ011971

Travel: Darshini Stark > Las Vegas, NV

Travel Pre-Authorization | Creating

Traveler	Destination	Dates
Darshini Stark	Las Vegas, NV	8/5/2024 – 8/8/2024

👤 Non UW Traveler   💼 150 Honorarium

Non UW Traveler Questions

Non UW Travelers must be provided the UW Privacy Notice. Check the following box to confirm this has happened.

☐ UW Privacy Notice has been provided *

Non UW Traveler Type *

○ Faculty/Staff Candidate
○ UW Student (non-employee)
○ Guest/Visitor

Help: No

This addition
are not empl
employees.

UW Privacy I

We are requi
used. You car

Non UW Tra

Faculty/Staff
for the purpc

UW Student
Traveler Affili

Guest/Visito

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22 Once the traveler has been provided with the UW Privacy Notice, please select the "UW Privacy Notice has been provided *" box.

Traveler	Destination	Dates
Darshini Stark	Las Vegas, NV	8/5/2024 – 8/8/2024

👤 Non UW Traveler   💼 150 Honorarium

Non UW Traveler Questions

Non UW Travelers must be provided the UW Privacy Notice. Check the following box to confirm this has happened.

☐ UW Privacy Notice has been provided *

Non UW Traveler Type *

○ Faculty/Staff Candidate
○ UW Student (non-employee)
○ Guest/Visitor

US Citizen *

○ Traveler is a US Citizen or Green Card holder
○ Non US traveler

employees.

UW Privacy I

We are requi
used. You car

Non UW Tra

Faculty/Staff
for the purpc

UW Student
Traveler Affili

Guest/Visito

23 Under "Non UW Traveler Type" please select the type of traveler.

Non UW Traveler Questions

Non UW Travelers must be provided the UW Privacy Notice. Check the following box to confirm this has happened.

☑ UW Privacy Notice has been provided *

Non UW Traveler Type *
○ Faculty/Staff Candidate
○ UW Student (non-employee)
○ Guest/Visitor

US Citizen *
○ Traveler is a US Citizen or Green Card holder
○ Non US traveler

Save

24 If they are entering or leaving the US, the "Visa Type/Status" drop down box will appear. Please select the correct option, as this information is also required. Click this dropdown.

*Please note that not all visa types are eligable for honorarium, so please confirm this information before offering an honorarium. For more information please see: **https://finance.uw.edu/globalsupport/honorarium-payments-foreign-nationals**

☑ Guest/Visitor

US Citizen *
○ Traveler is a US Citizen or Green Card holder
◉ Non US traveler

Will traveler be entering or leaving the US during this trip? *
◉ Entering or leaving US during trip
○ Not entering/leaving US

Visa Type/Status *

(choose visa)   ⌄

Save

✉ Contact • Help • Privacy • Terms
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(choose visa)
Canadian
A-2
B-1
B-2
F-1
H-1B
J-1
L-2
O-1
TN
VWB
VWT

US Citizen *

○ Traveler is a US Citizen or Green Card holder
◉ Non US traveler

Will traveler be entering or leaving the US during this trip? *

◉ Entering or leaving US during trip
○ Not entering/leaving US

Visa Type/Status *

| Canadian | ⌄ |

[Save]

25 Under the "US Citizen" section, please select the correct option.

Please note that Non US Travelers require more documentation and may have restrictions. For detailed information on traveler types and their requirements, please visit the UW Travel Services website:
https://finance.uw.edu/travel/ProspSabbConsultTravel

26 If they are a Non US traveler, please select if they will or will not be entering or leaving the US. This information is required.

27 Click "Save"

US Citizen *
○ Traveler is a US Citizen or Green Card holder
● Non US traveler

Will traveler be entering or leaving the US during this trip? *
● Entering or leaving US during trip
○ Not entering/leaving US

Visa Type/Status *

Canadian ⌄

Save

Contact • Help • Privacy • Terms
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28 We will need a mailing address for all Non UW Travelers to mail their reimbursement check.

Traveler   Destination   Dates
Darshini Stark   Las Vegas, NV   8/5/2024 – 8/8/2024

Non UW Traveler   150 Honorarium

Mailing Address

Provide a street address where this order should be mailed.

Save

✕ Cancel this Order...

29 Click "Save"

Non UW Traveler.   150 Honorarium

Mailing Address

Provide a street address where this order should be mailed

1234 I LOVE CANADA RD
Victoria BC VBX 3X4, Canada

Save

× Cancel this Order...

Contact • Help • Privacy • Terms
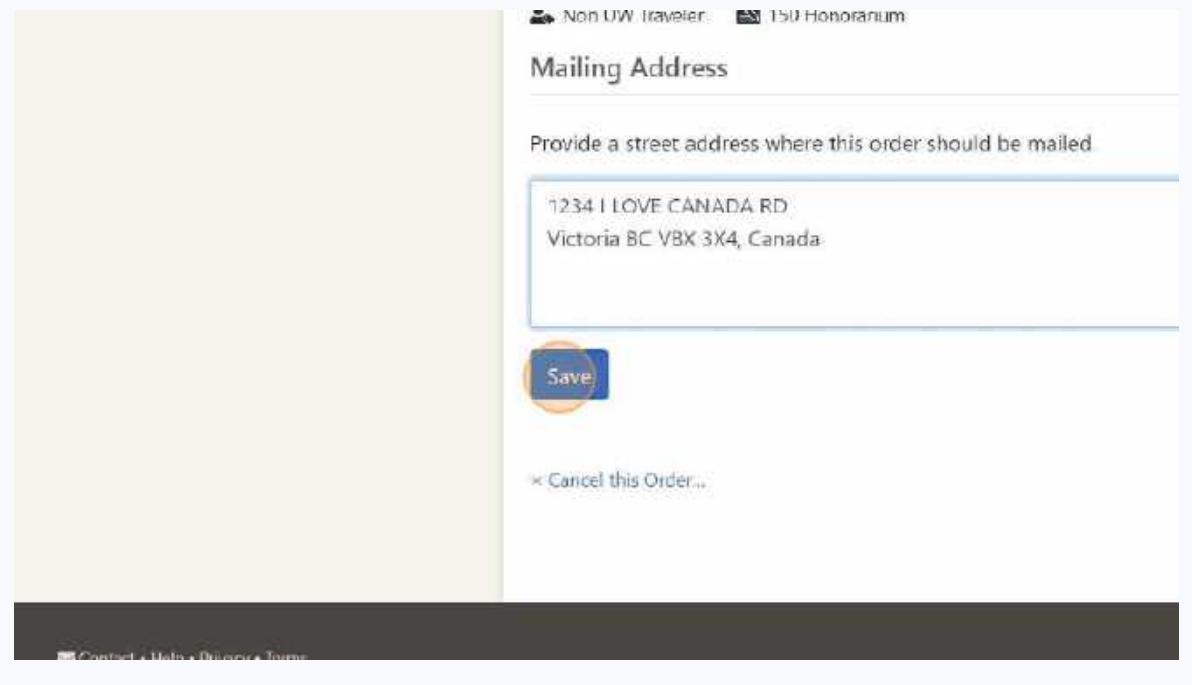
Adding Travel Items

30 To add the lodging and meal per diem rates to TREQ, please click the "Per Diem Rates" link. This will take you to the US GSA website.

Traveler	Destination	Dates
Darshini Stark	Las Vegas, NV	8/5/2024 – 8/8/2024

Travel Items

Travel Per Diem Rates

Per Diem reimbursement rates for travel lodging and meals is set per destination by the U.S. General Services Administration (US GSA).

Per Diem Rates | UW Travel Policy

Nights of lodging and days of meals is based on travel dates of departure 8/5/2024, return 8/8/2024. Subtract any personal days.

Lodging

- Enter number of nights at lodging
- Look up rate for your destination on US GSA website
- Enter US GSA Per Diem rate for Lodging (daily limit for your destination and month of travel)
- Enter your Actual Lodging (or expected) total for all nights
- You will be reimbursed for your actual lodging expenses

Lodging Nig

3

US GSA Per

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31 Select the State

Factors influencing lodging rates

Per diem boundaries

Fire safe hotels

Per diem contacts

Arkansas
California
Colorado
Connecticut
Delaware
District of Columbia
Florida
Georgia
Guam
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas

sk (*).

City

City (optional)

OR

ZIP

ZIP

Find Rates

32   Type in the City for more accurate results

Required fields are marked with an asterisk (*).

For Fiscal Year: *

2024 (Current Fiscal Year)

State

Nevada

City

City (optional)

OR

ZIP

ZIP

Find Rates

information ⃝, including any applicable forms.

---

33   Copy the amount under the month that the travel will be happening.

ated within a county for which rates are listed. To determine the the Census Geocoder.

Filter Results...

2023 Oct	Nov	Dec	2024 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
$152	$152	$152	$152	$152	$152	$120	$120	$120	$120	$120	$152

IE) rates and breakdown ⓘ

ion for federal employee travel:

ated within a county for which rates are listed. To determine the
the Census Geocoder.

Filter Results...

2023 Oct	Nov	Dec	2024 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
$152	$152	$152	$152	$152	$152	$120	$120	$120	$120	$120	$152

IE) rates and breakdown ⓘ

34   Paste the per diem amount in the "US GSA Per Diem" field.

jing and days of meals is based on travel dates of departure 8/5/2024, return 8/8/2024.
personal days.

f nights at lodging
r your destination on US GSA website
er Diem rate for Lodging (daily limit for your destination and month of travel)
al Lodging (or expected) total for all nights
bursed for your actual lodging expenses
de receipts for lodging reimbursement
ging reimbursement MAY NOT exceed the Lodging Limit except special cases
odging Limit must have a pre-authorizations

entals

Lodging Nights

3

US GSA Per Diem

$

Lodging Limit

Actual Lodging

$

ging and days of meals is based on travel dates of departure 8/5/2024, return 8/8/2024.
personal days.

f nights at lodging

r your destination on US GSA website

er Diem rate for Lodging (daily limit for your destination and month of travel)

al Lodging (or expected) total for all nights

bursed for your actual lodging expenses

de receipts for lodging reimbursement

ging reimbursement MAY NOT exceed the Lodging Limit except special cases

odging Limit must have a pre-authorizations

Lodging Nights

3

US GSA Per Diem

$ $120

Lodging Limit

Actual Lodging

$

entals

t days of travel   Meal Days

35 Switch to tab back to the US GSA site and scroll down to the meal per diem. Copy the amount under "M&IE Total".

Breakfast, lunch, dinner, incidentals - Separate amounts for meals and incidentals. M&IE Total = Breakfast + Lunch + Dinner + Incidentals. Sometimes meal amounts must be deducted from trip voucher. See More Information

First & last day of travel – amount received on the first and last day of travel and equals 75% of total M&IE.

Primary Destination ⓘ	County ⓘ	M&IE Total	Continental Breakfast/Breakfast	Lunch	Dinner	Incide Expen
Las Vegas	Clark	$69	$16	$17	$31	$5

Showing 1 to 1 of 1 entries

I'm interested in: **New Search**

Additional per diem topics   **Need more information?**   **Related t**

36 On the TREQ page, paste the per diem amount in the "US GSA Per Diem" field.

$360.00

$120 × 3 nights

Actual Lodging

$ 360

---

entals

f days of travel

r your destination on US GSA website

er Diem rate for Meals (M&IE Total)

bursed the Meals Total amount (per diem × days)

may be reduced, examples: conference includes lunch or traveling part of a day

needed for meals & incidentals

Meal Days

4

US GSA Per Diem

$ |

Meals Total

---

calculate actual reimbursement amount

ss than or equal to the Meals Total amount based on per diem

Meals Actual

---

r your destination on US GSA website

er Diem rate for Meals (M&IE Total)

bursed the Meals Total amount (per diem × days)

may be reduced, examples: conference includes lunch or traveling part of a day

needed for meals & incidentals

4

US GSA Per Diem

$ 69

Meals Total

$276.00

$69 × 4 days

---

calculate actual reimbursement amount

ss than or equal to the Meals Total amount based on per diem

e reduced to exclude specific daily meals not eligible for reimbursement

Meals Actual

$

em		URL	Amount	Line Total
rfare	✎		0.00 ✎	0.00
egistration	✎		0.00 ✎	0.00

37 To add additional travel items, scroll down and edit the line items currently prepopulated. Click the "Amount" column to open a line item details.

$276.00

$69 × 4 days

vill calculate actual reimbursement amount

less than or equal to the Meals Total amount based on per diem

be reduced to exclude specific daily meals not elligible for reimbursement

Meals Actual

$
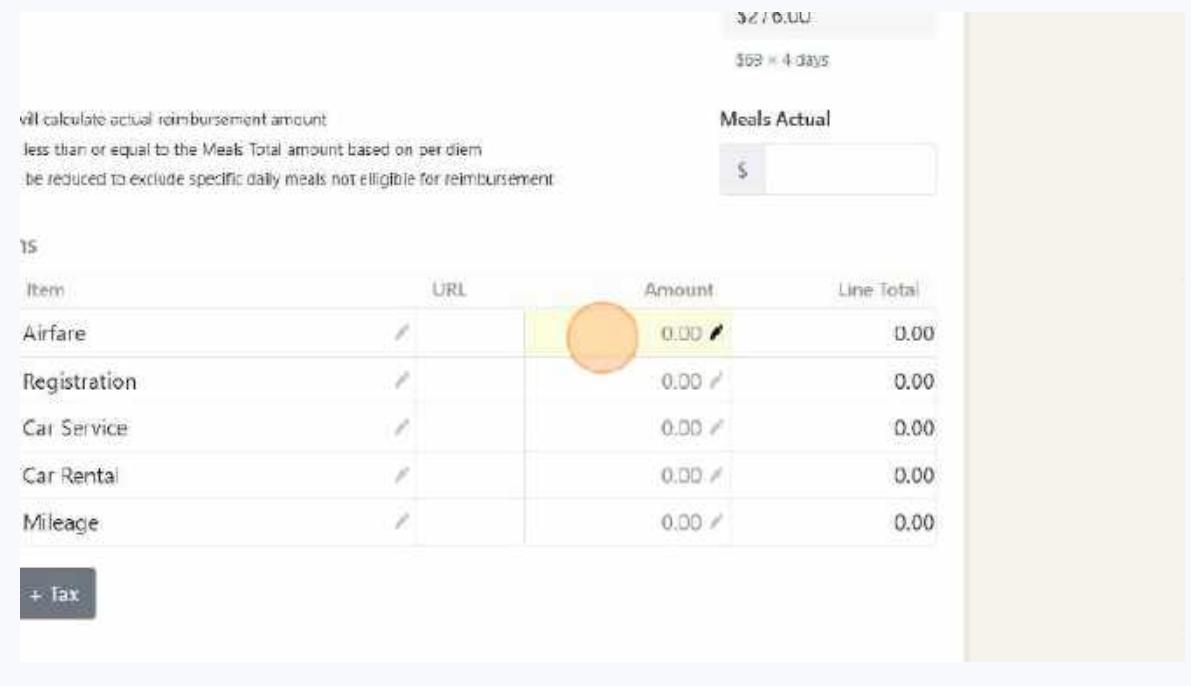
Item		URL	Amount		Line Total
Airfare	/		0.00	✏	0.00
Registration	/		0.00	/	0.00
Car Service	/		0.00	/	0.00
Car Rental	/		0.00	/	0.00
Mileage	/		0.00	/	0.00

+ Tax

38 In the "Amount" box, put an estimated cost. Click "Save"
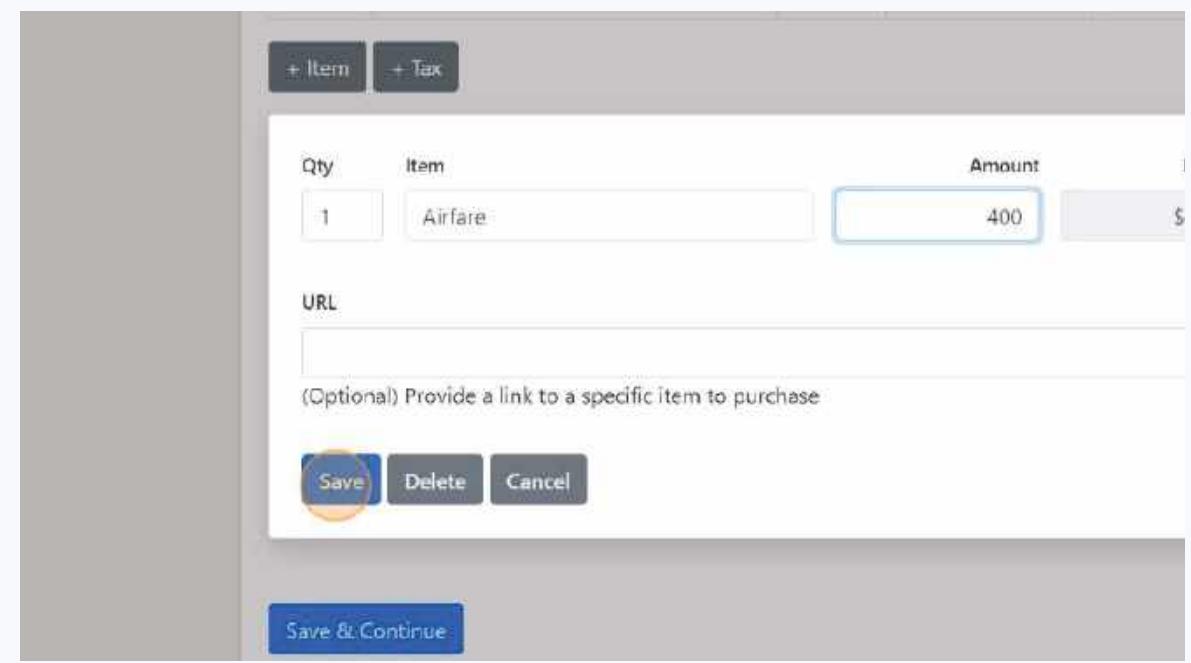
+ Item   + Tax

Qty	Item	Amount	
1	Airfare	400	$

URL

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

Save   Delete   Cancel

Save & Continue

39 Repeat for the other items. Leaving the amount box blank will leave the item off your final TREQ. If you want to change an item, click the pencil icon and type in your own name. You can also use the "URL" box to add a link for us to purchase things like conference registration.

| 1 | 🖊 | Mileage | 🖊 | | 0.00 🖊 |

+ Item **+ Tax**

Qty	Item		Amount	
1	Registration		250	$

URL

INSERT LINK FOR FINANCE TO PURCHASE

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

Save **Delete** **Cancel**

Q Search

W

em		URL	Amount	Line Total
rfare	🖊		400.00 🖊	$400.00
egistration	🖊	🔗 Link...	250.00 🖊	$250.00
ar Service	🖊		0.00 🖊	0.00
ar Rental	🖊		0.00 🖊	0.00
lileage	🖊		0.00 🖊	0.00

Tax

:inue

		Mileage				0.00
1						

+ Item   + Tax

Qty	Item	Amount	
1	Car Service	300	$

URL

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

Save   Delete   Cancel

Test Server
What does this mean?

Q Search

Other Items

Qty		Item		URL	Amount	Line T
1	/	Airfare	/		400.00 /	$4(
1	/	Registration	/	⬈ Link...	250.00 /	$2!
1	/	Car Service	/		300.00 /	$3(
1	/	Car Rental	✎		0.00 /	
1	/	Mileage	/		0.00 /	

+ Item   + Tax

Save & Continue

40 Click "Save & Continue" when done

Creating a TREQ Folder

41 For every TREQ order, there needs to be a corresponding TREQ folder. On the next page, click the grey "Copy" button.

Darshini Stark > Las Vegas, NV

Pre-Authorization | Creating

Destination	Dates
Stark	Las Vegas, NV	8/5/2024 – 8/8/2024

ad Attachments

Folder in OneDrive named

Q011969 [Copy]

Open OneDrive Folder
OneDrive Folder

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

Help: Attachments

Frequently supplemental files are needed to process reque 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 related to TREQ in a OneDrive file share. This gives you dra management, ability to preview files online, and to share fi

The fiscal office will designate a specific OneDrive folder y TREQ requests. A link will be provided to that folder within and Orders.

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

Project Folder Name

---

42 Then click the blue "Open OneDrive Folder".

Traveler	Destination	Dates
Darshini Stark	Las Vegas, NV	8/5/2024 – 8/8/2024

Upload Attachments

Create folder in OneDrive named

TREQ011969 [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

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

OneDrive

To make managing files easier for you and th related to TREQ in a OneDrive file share. This management, ability to preview files online, a

The fiscal office will designate a specific Onel TREQ requests. A link will be provided to that and Orders.

If you don't have a TREQ OneDrive folder yet get set up.

Project Folder Name

Your budget manager will give you instructio attachments in OneDrive. Generally they wan project, using the Project Number as the fold look like "TREQ001234".

43 It should open a new tab that is routed to your TREQ folder. Click the "+ New" button.

44 Select "Folder"

45   Paste the TREQ number in the "Name" field and press "Create"
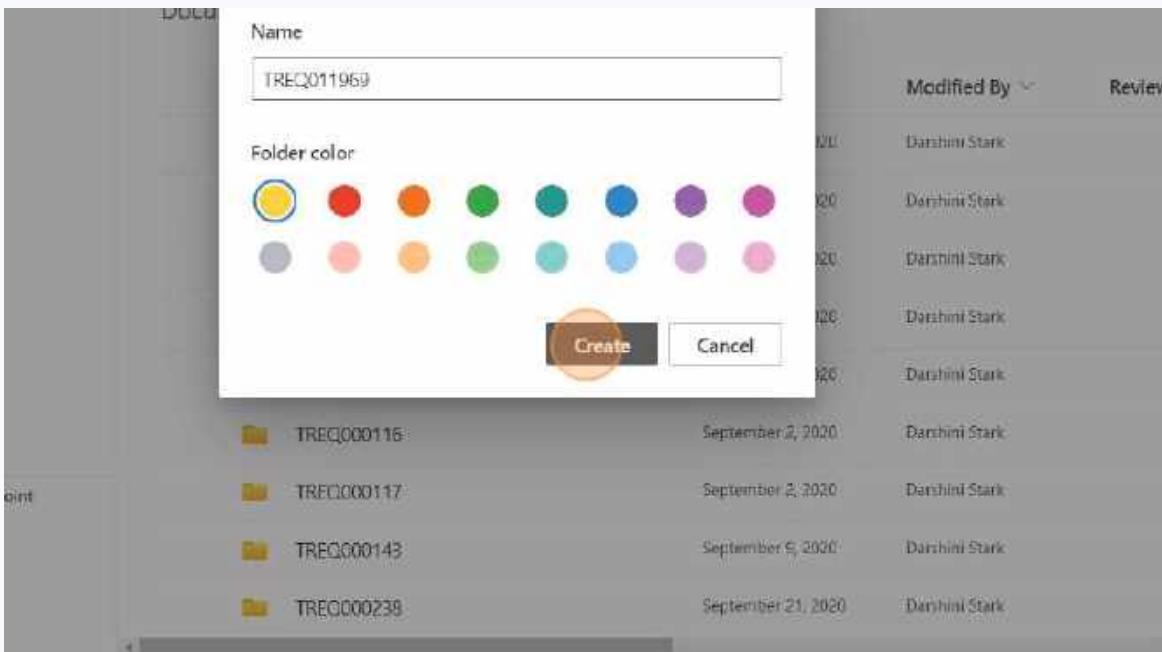
(i)   At this point you may not have supporting documentation for the travel. That is okay. Please still create the folder for the future travel reimbursement.

If you do have some helpful documents (i.e. an invitation letter for a guest speaker, a conference schedule, etc) please upload it to the folder after you create it.

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46   You can click the "Modified" column to sort it by most recently created. Choose "Newer to older"

Stark, Darshini

		Name ⌄	Modified ⌄	Modified By ⌄	Reviewed ⌄	U
○	🗋					
	📁	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		

New ⌄   ↑ Upload ⌄   ▦ Edit in grid view   ↪ Share   ⊙ Copy link   ⟳ Sync   ⬚ Add shortcut to OneDrive   ···

k, Darshini

	Name ⌄	Modified ⌄	Modified By ⌄	Reviewed ⌄	Updat
📁	TREQ000048	Older to newer	shini Stark		
📁	TREQ000110	Newer to older	shini Stark		
📁	TREQ000112	Filter by	shini Stark		
📁	TREQ000114	Group by Modified	shini Stark		
📁	TREQ000115	Column settings >	shini Stark		
📁	TREQ000116	Totals >	Darshini Stark		
📁	TREQ000117	September 2, 2020	Darshini Stark		

47   Open the TREQ folder by clicking on it

48   Click the grey "Upload" button. Click "Files" to open your file explorer on your computer. Select the files you wish to upload.

You can also drag and drop filed from your file explorer on your desktop.

49 Switch back to the TREQ tab in your browser and click "Done Uploading".

Add a Budget Number/Fiscal Tag

50 TREQ has been updated to accept Workday Worktags. It's totally okay if you only know the budget number and not the Worktag. TREQ will help you find the correct Worktag.
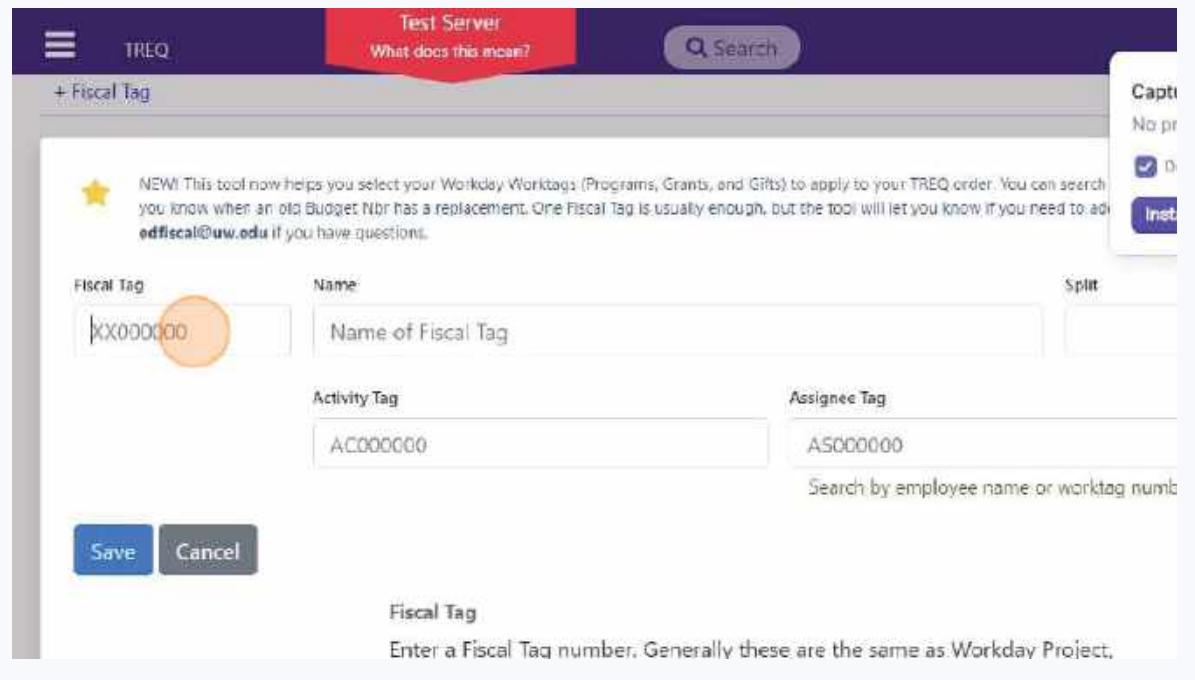
51 In the "Fiscal Tag" box, type the budget number. Be sure to not include a "-" or the Worktag will not pop up.
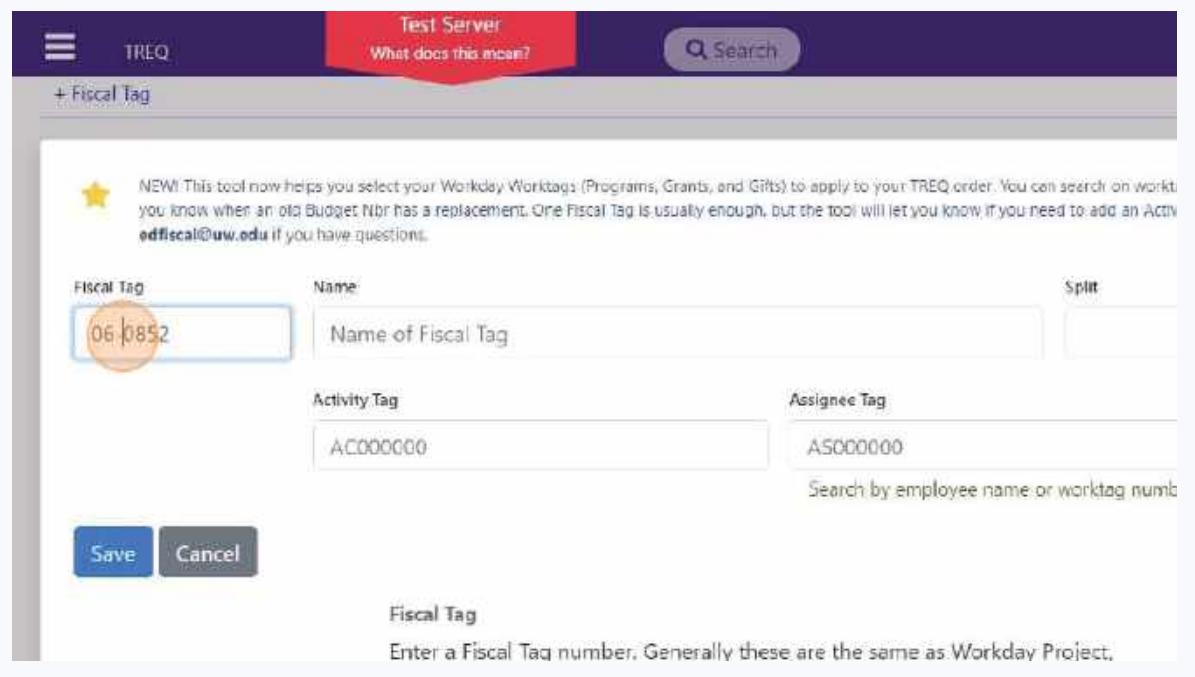
52 Select the budget number and name that pops up.

53 Below the "Activity Tag" and "Assignee Tag" a yellow alert will pop up informing you of the Worktag that replaced the budget number in Workday. Copy the Worktag.

54 Paste the Worktag in the "Fiscal Tag" box, replacing the budget number.
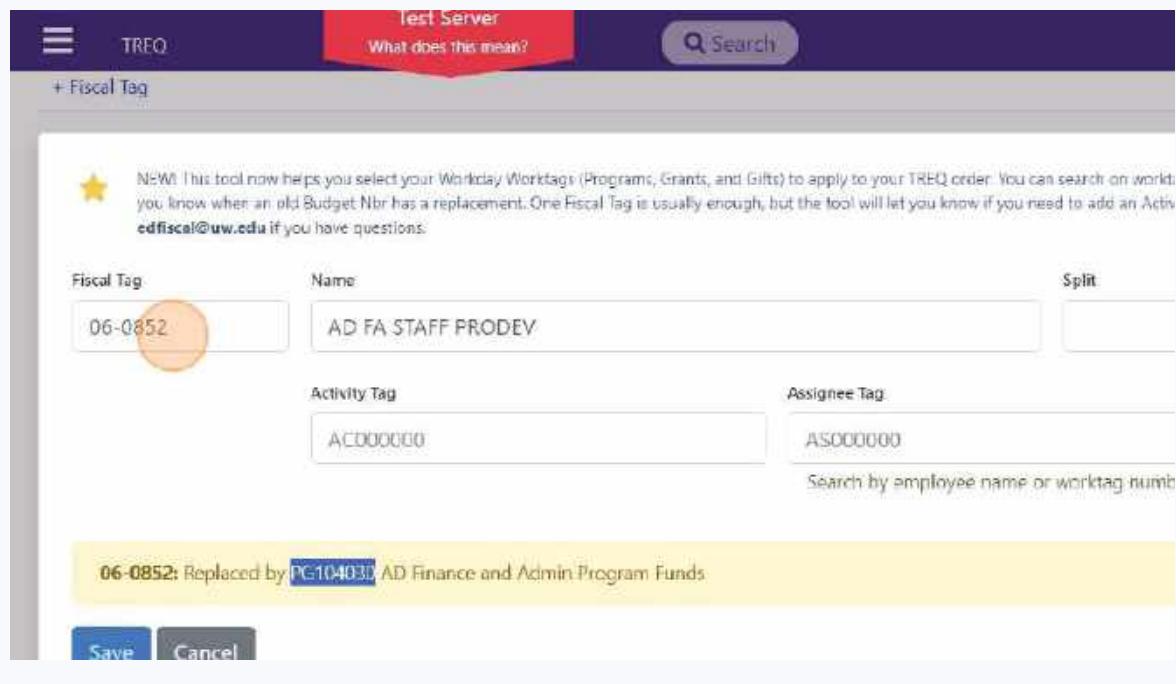
55 Click the new Worktag and name that pop up.
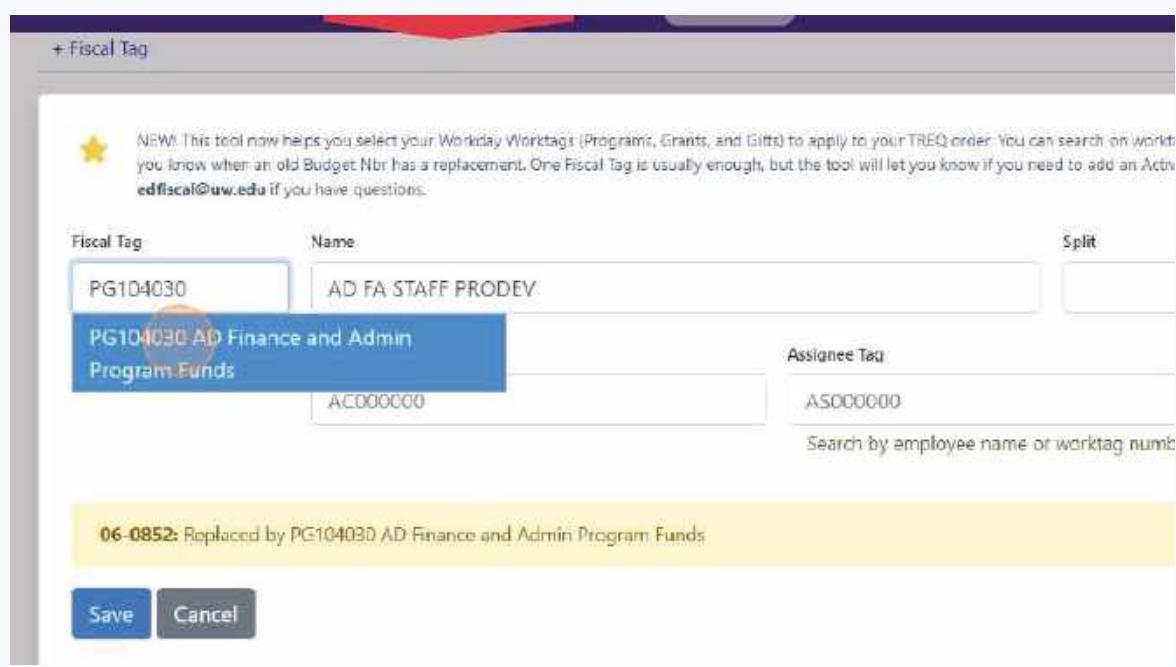
56 Not all Worktags need Activity or Assignee tags. If you don't have one or don't know what to use, you can leave it blank and the budget manager will fill it in if necessary.

When you are done, click "Save" and "Continue"

Final Steps!

Test Server
at does this mean?

Q Search

W

Travel: Darshini Stark > Las Vegas, NV

Change Trip

Traveler	Destination	Dates
Darshini Stark	Las Vegas, NV	8/5/2024 – 8/8/2024

Business Purpose
Attenting a conference and presenting research

Items

Change Items

ITEM	AMOUNT
Lodging (limit $360 = 3 nights × $120)	$360.00
Meals (4 days × $69)	$276.00
Airfare	$400.00

Test Server
at does this mean?

Q Search

W

Airfare		$400.00
Registration	☑ Link...	$250.00
Car Service		$300.00
Presentation Materials		$50.00
	Total	$1,636.00

Fiscal Tags

Change Fiscal Tags

TAG	NAME	OTHER TAGS	SPLIT
PG104030	AD Finance and Admin Program Funds		×

Department Approval

● Send to Department Approver

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

Santhi Perumal

Approver Note

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

Submit

× Cancel this Order...

58 Click "Submit"

Santhi Perumal

Approver Note

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

Submit

× Cancel this Order...

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59 Good Job! Your Travel Pre-Auth has been submitted!