



Workday Finance, configured by a Chartered Accountant.

ABHAYJAISWAL.COM

■ WORKDAY FINANCE · STEP BY STEP

Edit Purchase Order Without Change Order

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■ Purpose

This guide provides step-by-step instructions for editing a purchase order without creating a change order. This feature is best used for minor issues when you need to make quick and easy corrections of the purchase order data.

■ Prerequisites

Before editing a PO without a Change Order, ensure the following:

- You have the appropriate Workday Security Role (e.g., Finance Administrator and Services Coordinator)
- You have required information:
 - Purchase Order Number
 - Edits you want to make

■ View Purchase Order

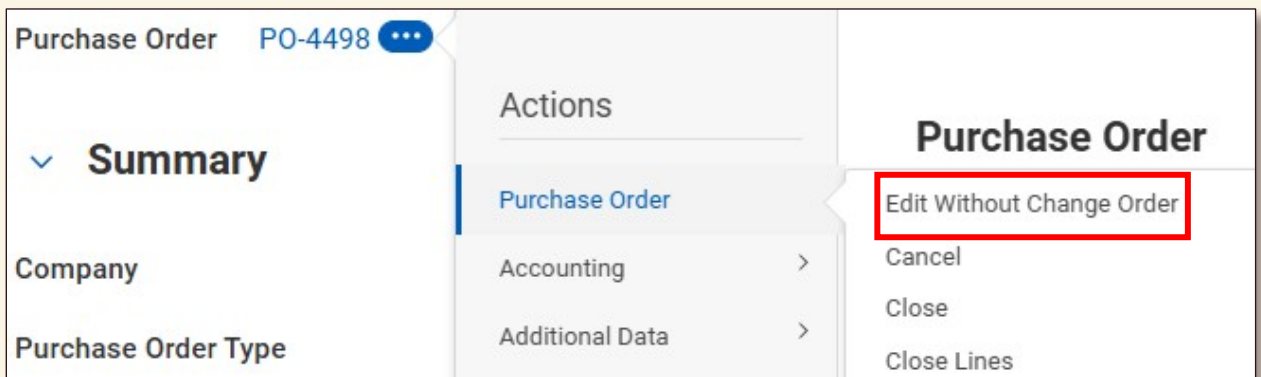
- Search for Find Purchase Orders the Workday search bar and click on the resulting “Find Purchase Orders” report.
- In the Find Purchase Orders report click on the magnifying glass in the Purchase Order column to view it.

 Find Purchase Orders Report

Purchase Orders 20 Items										
Purchase Order	Number	Company	Purchase Order Type	Status	Issue Option	Buyer	Supplier	Order-From Connection	Document Date	Due Date
	PO-4498	Global Modern Services, Inc. (USA)		Issued	Print	Teresa Serrano	Global Modern Services, PLC		06/05/2025	
	PO-4499	Global Modern Services, Inc. (USA)		Issued	Print	Teresa Serrano	Amazon		06/05/2025	
	PO-4500	Global Modern Services, Inc. (USA)		Issued	Print	Teresa Serrano	Amazon		06/05/2025	

■ Edit Without Change Order

- Click on the Related Actions for the Purchase Order.
- Hover over Purchase Order.
- Select “Edit Without Change Order”.



The screenshot displays the Workday interface for a Purchase Order (PO-4498). On the left, the 'Summary' section is expanded, showing fields for 'Company' and 'Purchase Order Type'. In the center, the 'Actions' menu is open, with 'Purchase Order' selected. On the right, the 'Purchase Order' details panel is visible, and the 'Edit Without Change Order' option is highlighted with a red rectangular box. Other options in the 'Purchase Order' panel include 'Cancel', 'Close', and 'Close Lines'.

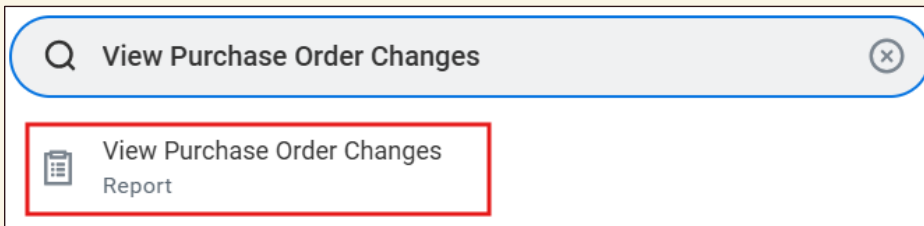
■ Edit Without Change Order

➤ Edit the Without Change Order Fields.

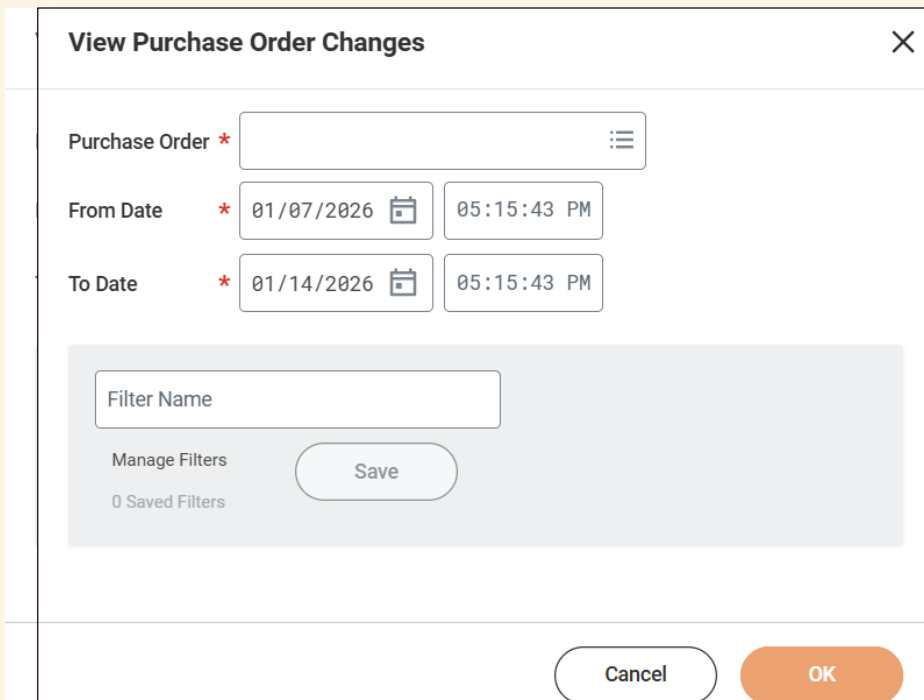
Purchase Order Type	
Payment Terms	X Net 30
Due Date	MM/DD/YYYY
Shipping Terms	
Shipping Method	
Shipping Instructions	
Buyer	X Teresa Serrano
Bill-To Contact	
Bill-To Contact Detail	Teresa Serrano
Bill-To Address	3939 The Embarcadero San Francisco, CA 94111 United States of America
Ship-To Contact	
Apply changes to Ship To Contact to all lines	☐
Ship-To Contact Detail	Teresa Serrano
Memo	
Internal Memo	

■ View Purchase Order Changes

- Search for View Purchase Order Changes in the Workday Search Bar and click on the resulting “View Purchase Order Changes” Report.
- Select a purchase order and time-period for which to view changes to the purchase order.



Search bar results for "View Purchase Order Changes". The search bar contains the text "View Purchase Order Changes" and a magnifying glass icon. Below the search bar, a red box highlights the result "View Purchase Order Changes Report" with a document icon.



Dialog box titled "View Purchase Order Changes" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Purchase Order ***: A text input field with a menu icon (three horizontal lines) on the right.
- From Date ***: A date and time selection field showing "01/07/2026" and "05:15:43 PM".
- To Date ***: A date and time selection field showing "01/14/2026" and "05:15:43 PM".
- Filter Name**: A text input field.
- Manage Filters**: A link below the filter name field.
- 0 Saved Filters**: A status message below the filter name field.
- Save**: A button to save the filter.
- Cancel**: A button at the bottom left.
- OK**: A button at the bottom right.

■ View Purchase Order Changes

- The View Purchase Order Changes Report Includes fields for: Timestamp, Task, Updated By, Change History Category, What Changed, Changed Field, New Value, and Previous Value.

Purchase Order

PO-008328

To Date

09/02/2021 12:01:19.355 PM

From Date

08/26/2021 12:01:19.355 PM

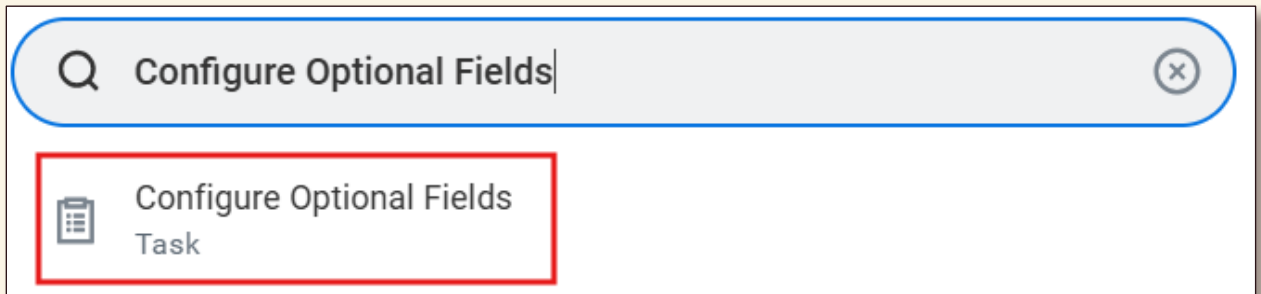
Turn on the new tables view

4 items

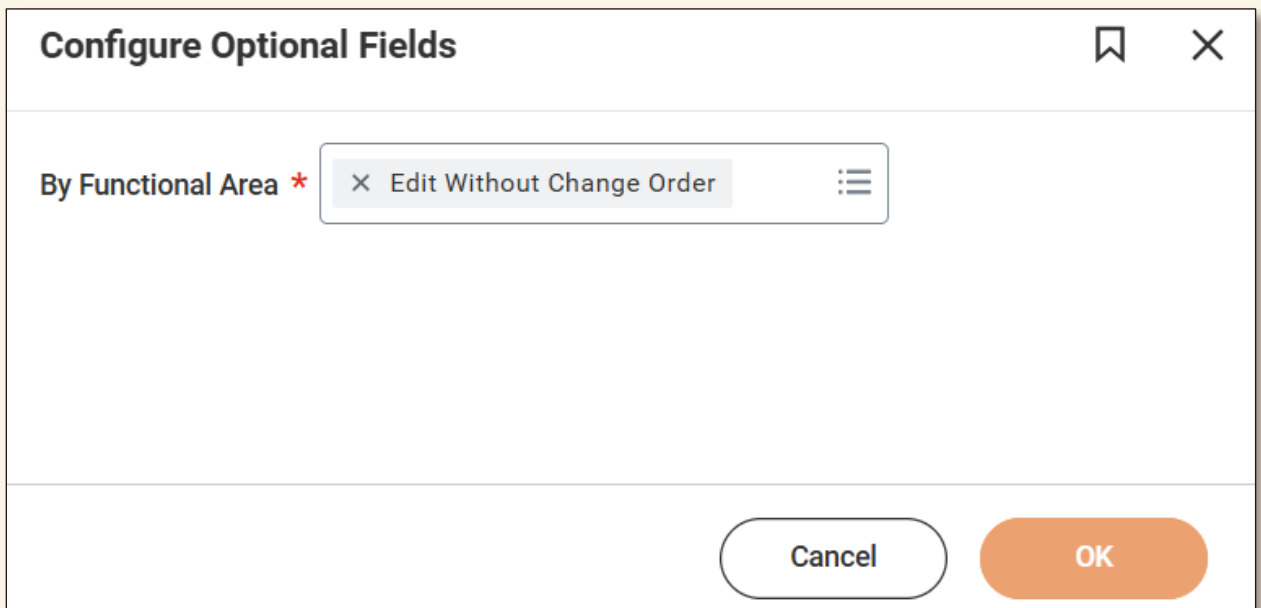
Timestamp	Task	Updated By	Change History Category	What Changed	Changed Field	New Value	Previous Value
09/02/2021 12:00:21 PM	Edit Without Change Order	mg-codonnell / Colin O'Donnell	Purchase Order Header	PO-008328	Shipping Terms	H - FOB HO SP	SP - FOB SP
09/02/2021 12:00:21 PM	Edit Without Change Order	mg-codonnell / Colin O'Donnell	Purchase Order Header	PO-008328	Shipping Method	Oak Harbor Freight	Ground Shipping
09/02/2021 12:00:21 PM	Edit Without Change Order	mg-codonnell / Colin O'Donnell	Purchase Order Header	PO-008328	Header Due Date	2021 09 03	
09/02/2021 12:00:21 PM	Edit Without Change Order	mg-codonnell / Colin O'Donnell	Purchase Order Header	PO-008328	Payment Terms	Net 45	Net 30

■ Configure Optional Fields

- Search for Configure Optional Fields in the Workday search bar.
- Under the By Functional Area Prompt. Select Edit Without Change Order.



The screenshot shows a search bar with the text "Configure Optional Fields" entered. Below the search bar, a result is displayed with a document icon and the text "Configure Optional Fields Task". This result is highlighted with a red rectangular box.



The screenshot shows the "Configure Optional Fields" dialog box. At the top, the title "Configure Optional Fields" is displayed. Below the title, there is a section labeled "By Functional Area" with a red asterisk. To the right of this label is a dropdown menu with the selected option "Edit Without Change Order". At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

■ Configure Optional Fields

- Configure optional fields to be “Hidden For All”, “Required For All”, or based on Security Group. All the fields available for editing under the Edit Without Change Order task can be hidden or required using this task.

Configure Optional Fields by Task

Process Edit Without Change Order

2 Items

	*Field	*Criteria	Enforce Required in Web Services	Hidden For	Required For	Not Enterable For
	 Due Date 	 Security Group 	☐	 Buyer 	 Services Coordinator 	
	 Requester 	 Hide For All 	☐			

■ Common Errors and Resolutions

Issue	Description	Resolution
Field is not editable.	By default, Workday protects the financial integrity of a PO once it has been issued. Direct edits are restricted to administrative fields.	Use the Create Change Order task to make a formal edit.
Cannot edit the PO.	Once a PO has been matched to a Supplier Invoice or manually closed, Workday locks the record to prevent accounting mismatches.	If the PO is Closed: You must first use the Reopen Purchase Order task.

■ Best Practices

- Use clear and consistent naming conventions.
- Limit changes to “Non-Financial” Data.
- The golden rule of direct edits is to never touch anything that changes the "intent" of the PO.



Thank You

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Workday Finance, configured by a Chartered Accountant.

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