This quick reference guide (QRG) details how to configure your friends and family in Workday. Additionally, this QRG explains how to grant those friends and family members third-party access to your account if you choose to give them any of those privileges.

To configure your friends and family, complete the following steps.

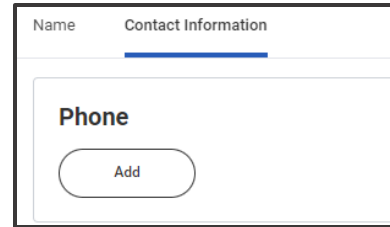## CONFIGURE FRIENDS AND FAMILY

From the Workday Home page:

1. Click the **Profile Icon** in the top right-hand corner of the page.

2. Click the **View Profile** button.

3. Select **Contact** from the 'Student Profile Menu'.

4. Select the **Friends and Family** tab.

5. Click the **Add** button.

6. Choose the appropriate **Relationship Type** from the dropdown list. If the you would like for this person to be granted third-party access check the **Is Third Party User** checkbox at this time.

7. Enter the friend or family member's **First Name** and **Last Name** in the corresponding fields.

8. Select the **Contact Information** tab.

10. Click the **Add** button and enter the friend or family member's contact information.

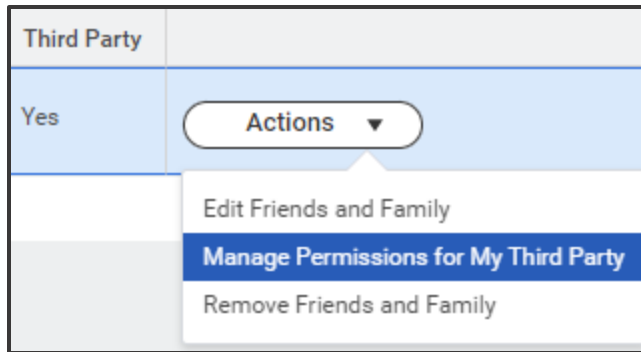11. Click **OK**.

12. Click **Done**.

 Note: To add a friend or family member you must add at least one of their contact methods. The three contact options are **Phone**, **Address**, and **Email**.

MANAGE THIRD PARTY PERMISSIONS

From the Friends and Family tab:

1. Click the **Actions** button in the row of the person to whom you wish to grant third-party permission.

2. Select **Manage Permissions for My Third Party** from the dropdown list.

7. Click **OK**.

8. Check the **Allowed** checkbox for all tasks for which you would like to grant the third-party access.

9. Click **OK**.

10. Enter a reason for granting this permission into the **Purpose of Waiver** field. For example: Giving my parent access to pay my bill.

11. Check the **Confirm** checkbox.

12. Click **Submit**.

Note: A friend or family member must be designated as a third-party user and have a valid email in Workday to receive third-party access. No one outside your institution can access your student records without having third-party permissions granted in Workday.