SOD Check
Segregation of Duties
www.sodcheck.com

The five steps of the CHECK Method

You are here

- **C** Capture Data
- **H** Highlight Conflicts
- **E** Examine Results
- **C** Confirm Safeguards
- **K** Keep a Record of Decisions

How to Run NetSuite User Access Report

A free guide from SOD Check. Also called the NetSuite user roles report, or the Manage Users report.

Short answer: The NetSuite user access report lists every user and the roles each person holds. To run it, open **Manage Users** from the Setup menu, leave the filters blank, and export the list to Excel. You need this report for a segregation of duties review. Auditors often ask for it too.

1. What this report shows

1. Every user in your NetSuite account.
2. The email address for each user.
3. Every role each user holds. A user with three roles gets three rows.

Roles alone do not tell you what a person can do. The second report, the role permissions report, does. A segregation of duties review needs both. See the companion guide: How to Run NetSuite Role Permissions Report.

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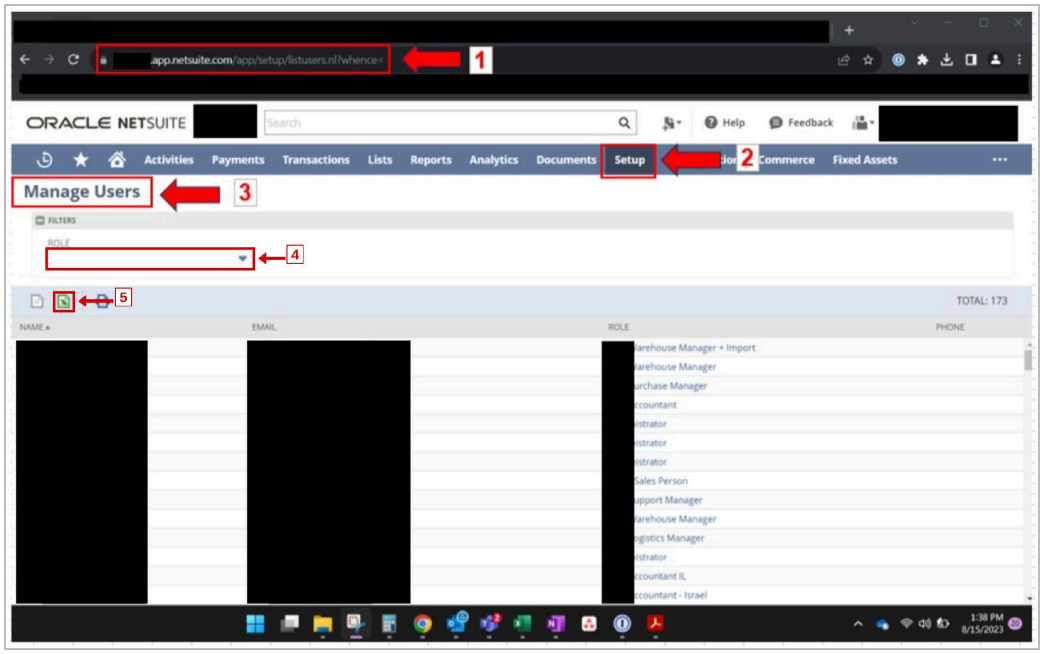
2. Before you start

1. Sign in with an account that can view users and roles. This is usually a system administrator account.
2. Do not filter the report. Filters hide users and roles you need.
3. Your menus may use different labels. Use the pictures in this guide as your map.
4. Plan to take your proof screenshot right after you export, while the report is still open.

3. Run the report

Required fields: Name, Email, and Role.

1. Sign in to NetSuite.
2. Go to **Setup**.
3. Select **Users/Roles**, then **Manage Users**.
4. Leave the Role filter blank. Every user and every role should show.
5. Click the Excel icon. NetSuite exports the list as an Excel workbook (.xlsx).



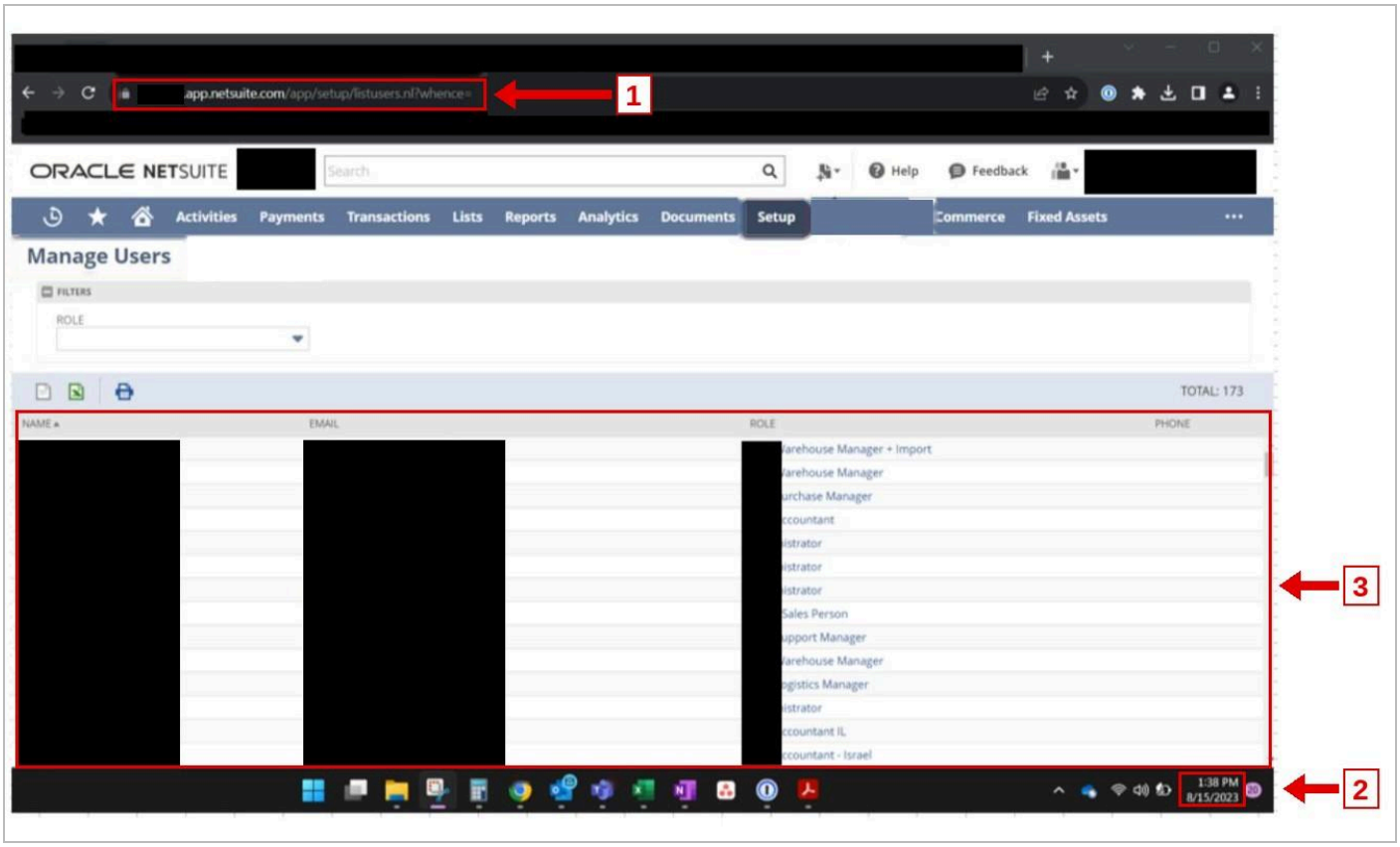
The red numbers match the five steps above. Sample data only.

4. Take your proof screenshot

Keep the report on screen. Your screenshot must show three things:

1. **The NetSuite web address** in the browser bar. It shows the report came from a live account.
2. **The date and time** on your computer. It shows when you ran the report.
3. **The report itself**, as it looks on screen.

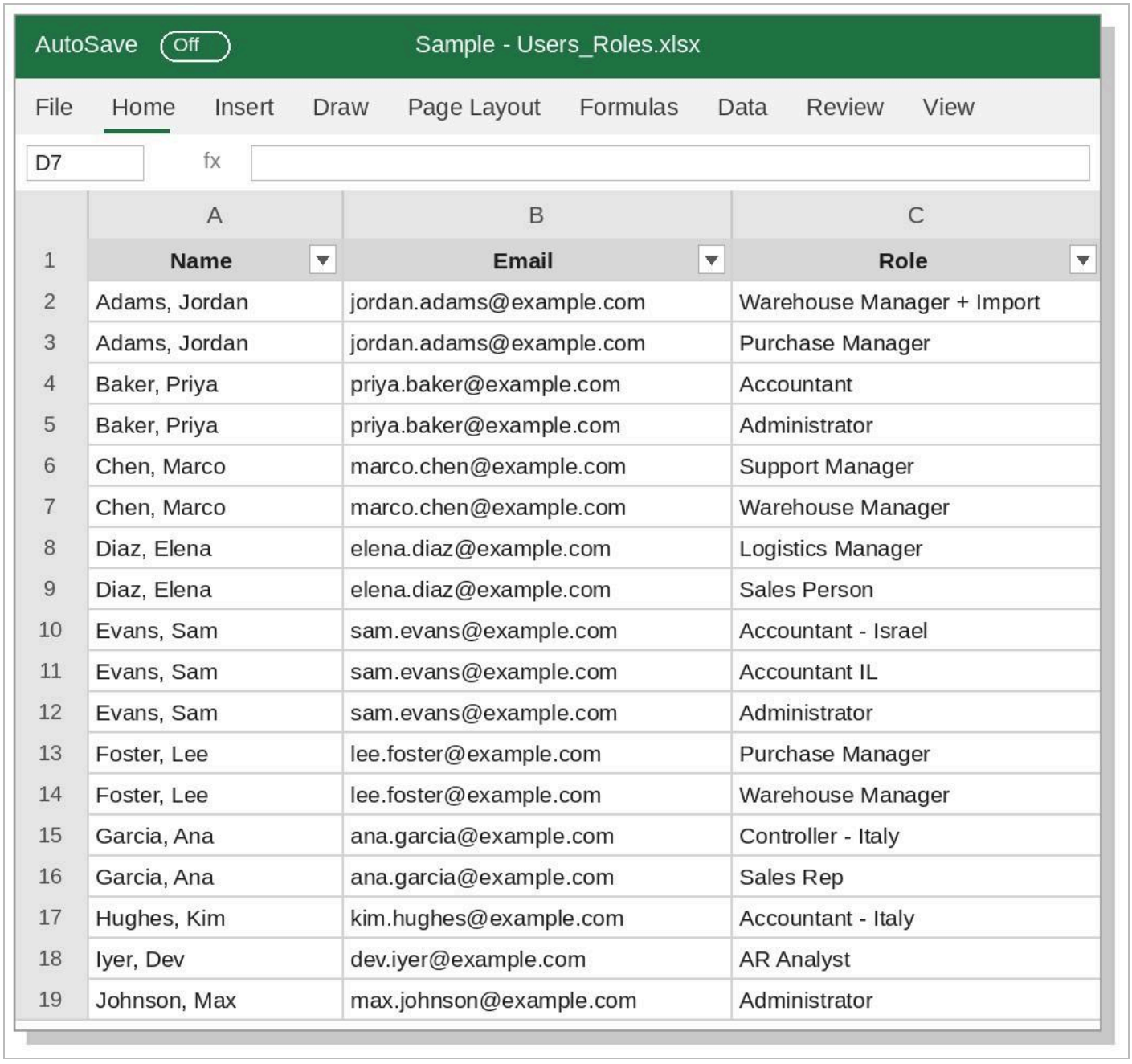
Do not crop, blur, or black out these three things in your own file. Anyone who relies on the report will need them. We blacked out details in the pictures in this guide. Yours should stay whole.



A good example. The red numbers match the three things above.

5. Save your workbook

1. Open the Excel file you exported.
2. Add a new tab named **Evidence Screenshot**. Paste your screenshot into it.
3. Save the file as: `CompanyName_NetSuite_Manage_Users_User_Role_Listing_YYYY-MM-DD.xlsx`



	A	B	C
1	**Name**	**Email**	**Role**
2	Adams, Jordan	jordan.adams@example.com	Warehouse Manager + Import
3	Adams, Jordan	jordan.adams@example.com	Purchase Manager
4	Baker, Priya	priya.baker@example.com	Accountant
5	Baker, Priya	priya.baker@example.com	Administrator
6	Chen, Marco	marco.chen@example.com	Support Manager
7	Chen, Marco	marco.chen@example.com	Warehouse Manager
8	Diaz, Elena	elena.diaz@example.com	Logistics Manager
9	Diaz, Elena	elena.diaz@example.com	Sales Person
10	Evans, Sam	sam.evans@example.com	Accountant - Israel
11	Evans, Sam	sam.evans@example.com	Accountant IL
12	Evans, Sam	sam.evans@example.com	Administrator
13	Foster, Lee	lee.foster@example.com	Purchase Manager
14	Foster, Lee	lee.foster@example.com	Warehouse Manager
15	Garcia, Ana	ana.garcia@example.com	Controller - Italy
16	Garcia, Ana	ana.garcia@example.com	Sales Rep
17	Hughes, Kim	kim.hughes@example.com	Accountant - Italy
18	Iyer, Dev	dev.iyer@example.com	AR Analyst
19	Johnson, Max	max.johnson@example.com	Administrator

Sample data, not real people.

6. Check before you move on

1. Every user has a name, an email, and a role.
2. No filters are applied.
3. The Evidence Screenshot tab shows the web address, the clock, and the report.
4. The file opens in Excel.

7. What next?

1. Run the second report. See: How to Run NetSuite Role Permissions Report.
2. Want to see where one person has too much control? Download the free Compare Ways to Run a Segregation of Duties Review: Side-by-Side Checklist.
3. Want us to do the analysis? Book a free 15-minute consultation at www.sodcheck.com. You export two reports. We never log in to your systems.

SOD Check helps you find where one person may have too much control, so you can decide what needs to change.