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 Pull Workday User Access Report

A free guide from SOD Check. Hand it to your Workday system administrator.

Short answer: A segregation of duties review starts with one list: who has access to what in Workday. Workday keeps that list in a report called **Security Group Assignments – All Account Types**. Your Workday system administrator runs it, adds four fields, leaves every filter off, and exports it to Excel. Auditors often ask for the same list.

1. What this report shows

#	Workday column label	What it tells you
1	**Workday Account**	Which account the access belongs to.
2	**Email - Primary Work**	Who that account is for.
3	**Security Group**	Which security groups that account belongs to. SOD Check maps each group to what it allows.
4	**Active Status**	Whether that user is still active.

These four fields are required. The standard report also shows other columns, such as Type and Manager. Leave them in. Do not add pay, salary or any other compensation field. This report covers user access permissions only.

2. Before you start

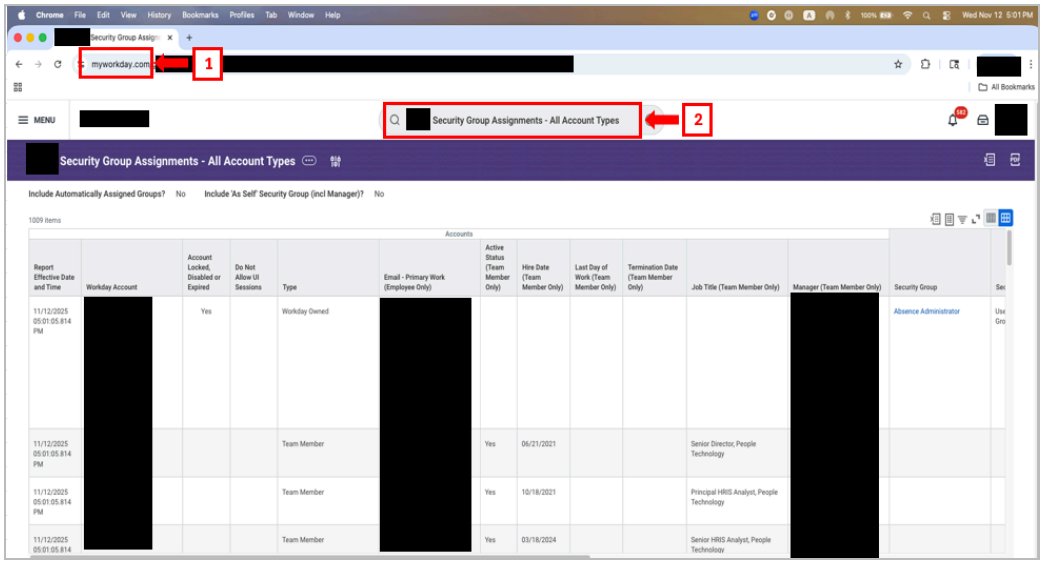
1. Sign in with an account that can view users, roles and role-permission differences. This is usually the Workday system administrator account.
2. If your company has not run this report before, you may need to create it first as a custom report. Steps 3 and 4 show the settings.
3. Run the report for every user. Do not filter it to selected users or roles. Filters hide the accounts you need.
4. Your Workday menus may use different labels. Use the pictures in this guide as your map.
5. Take your proof screenshot right after you export, while the report is still open.

3. Run the report

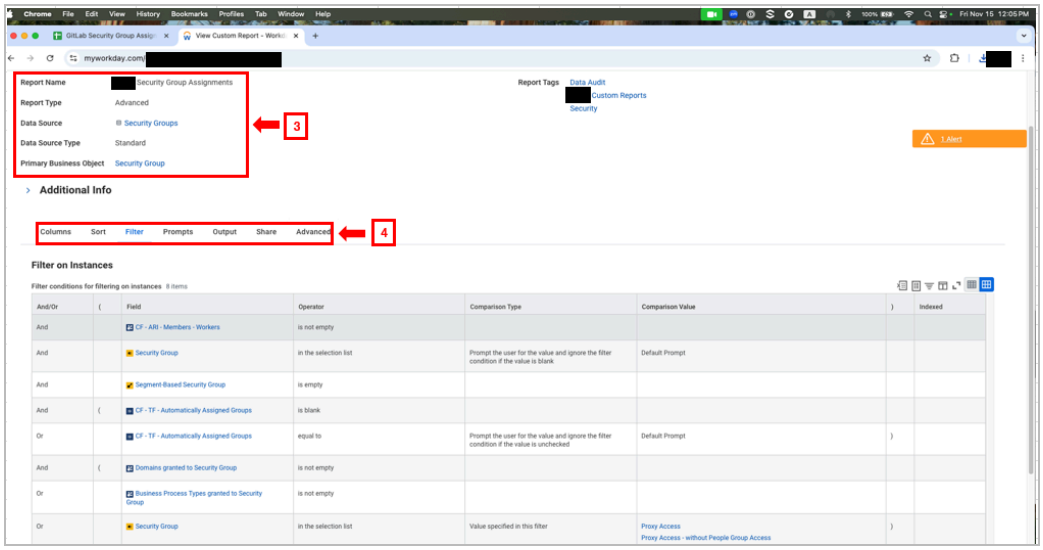
1. Sign in to Workday.
2. Type **Security Group Assignments – All Account Types** in the search box. If it does not appear, create it as a custom report with steps 3 and 4.
3. Set Report Type to **Advanced**, Data Source to **Security Groups**, Data Source Type to **Standard**, and Primary Business Object to **Security Group**.
4. Open **Additional Info** (Columns, Sort, Filter, Prompt, Output, Share, Advanced). Add or edit the fields so the four required fields show.
5. Run the report, then export it to Excel.

The red numbers on the pictures match these steps. Sample data only.

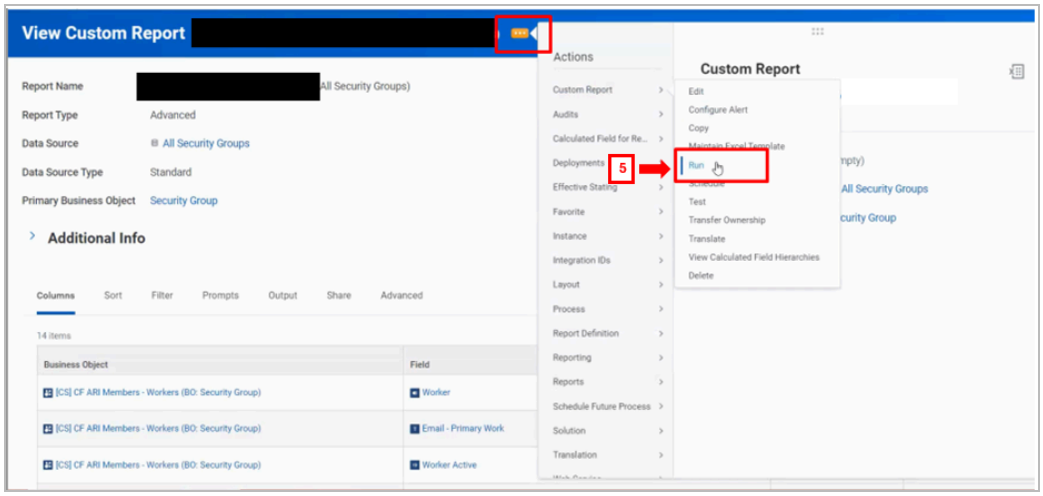
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Steps 1 and 2. Sign in, then search for the report.



Steps 3 and 4. Check the report type and data source, then open Additional Info.



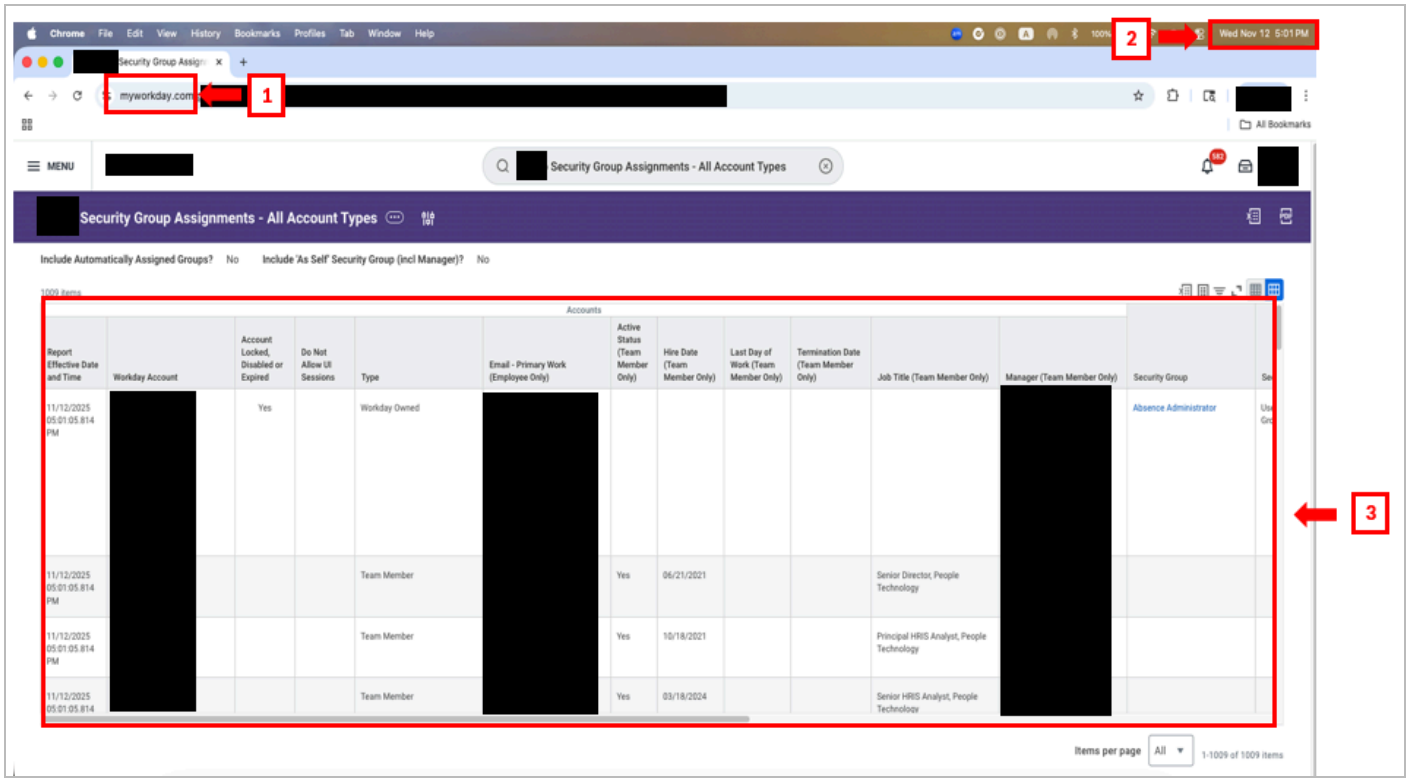
Step 5. Run the report.

4. Take your proof screenshot

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

1. **The web address** in the browser bar. It shows the report came from your live production account, not a sandbox or test account.
2. **The date and time** on your computer clock. 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. 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_Workday_Security_Group_Assignments_All_Account_Types_YYYY-MM-DD.xlsx`

Company Security Group Assignments - All Account Types									
Security Group (Optional)									
Include Automatically	No								
Include 'As Self' Secu	No								
					Accounts				
Report Effective Date and Time	**Workday Account**	**Account Locked, Disabled or Expired**	**Do Not Allow UI Sessions**	**Type**	**Email - Primary Work (Employee Only)**	**Active Status (Team Member Only)**	**Hire Date (Team Member Only)**	**Last Day of Work (Team Member Only)**	**Termination Date (Team Member Only)**
11/12/2025 17:01	wd-support	Yes		Workday Owned					
11/12/2025 17:01	Employee1			Team Member	employee1@company.com	Yes	6/21/2021		
11/12/2025 17:01	Employee2			Team Member	employee2@company.com	Yes	10/18/2021		
11/12/2025 17:01	Employee3			Team Member	employee3@company.com	Yes	3/18/2024		
11/12/2025 17:01	Employee4			Team Member	employee4@company.com	Yes	9/27/2021		
11/12/2025 17:01	Employee5			Team Member	employee5@gcompany.com	Yes	8/28/2023		
11/12/2025 17:01	Employee6			Team Member	employee6@company.com	Yes	9/30/2024		
11/12/2025 17:01	Employee7			Contingent Worker	employee7@gcompany.com	Yes	6/16/2025		
11/12/2025 17:01	Employee8			Contingent Worker	employee8@company.com	Yes	9/8/2025		
11/12/2025 17:01	wd-support	Yes		Workday Owned					
11/12/2025 17:01	wd-support	Yes		Workday Owned					
11/12/2025 17:01	wd-support	Yes		Workday Owned					
11/12/2025 17:01	wd-support	Yes		Workday Owned					
11/12/2025 17:01	wd-support	Yes		Workday Owned					
11/12/2025 17:01	Employee8			Team Member	employee8@company.com	Yes	4/6/2020		
11/12/2025 17:01	Employee9	Yes		Team Member	employee9@company.com	No	7/13/2020	2/1/2025	2/1/2025
11/12/2025 17:01	Employee10			Team Member	employee10@company.com	Yes	10/26/2020		
11/12/2025 17:01	Employee11			Team Member	employee11@company.com	Yes	10/12/2020		
11/12/2025 17:01	Employee12			Team Member	employee12@company.com	Yes	1/5/2021		
11/12/2025 17:01	Employee13			Team Member	employee13@company.com	Yes	4/19/2021		

Sample data, not real people.

6. Check before you move on

1. Every user has a Workday Account, an email, a Security Group and an Active Status.
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. 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.
2. Want us to do the analysis? Book a free 15-minute consultation at www.sodcheck.com. You export one report. 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.