This document explains what the System Administrator needs to do BEFORE and AFTER your dealership upgrades to CDK Simple ID for Drive.

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Prepare for the Upgrade

Before the upgrade, your CDK Drive System Administrator (with access to MAINT) is asked to run two Drive reports using functions LIUTBD and EDOM. These reports will identify inactive user profiles that can be removed, and will show you each user that doesn't have an email address in their CDK Drive user profile.

For the upgrade to work, every active user needs a unique email address for it to be migrated to CDK Simple ID. If the same email address exists in multiple Drive user profiles, this will cause the upgrade to fail, which is why it's important for each user profile in Drive to have a unique email address.

The email address in a user's Drive profile will become the user's new CDK Simple ID, which will be used in place of the current CDK Drive logon.

Drive users need to leave their workstations turned on until they see the new **CDK Drive Simple ID** icon on their desktop. Ask them not to use the new icon until the morning after the upgrade.

Delete Inactive Users

The **Inactive User Preview Report** identifies the users have not logged into Drive in the past 30 days. This is a great opportunity to identify and delete users who no longer work at your dealership, as well as remove duplicate logons, so their profiles don't get migrated to CDK Simple ID.

1. In Drive, search for the function called **LIUTBD**. Enter this function code in the *Launch* field in the top left corner of the screen or in the *Quick Launch* menu on the right side of the screen.
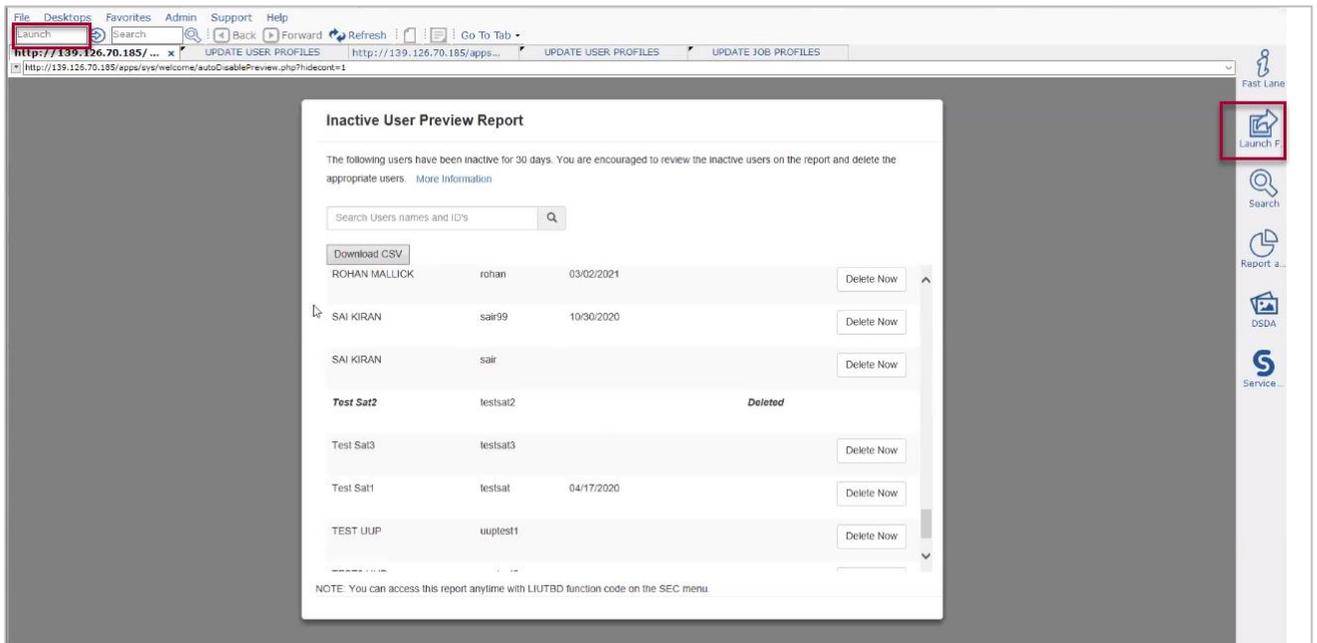
2. To learn more about the retention of inactive user rules, click the **More Information** link at the top of the report. Click **Close [X]** to return to the report.

3. Review the list of inactive users and identify the ones that you want to permanently delete from CDK Drive. We recommend deleting each user that no longer works at your dealership and no longer needs to use Drive.

   There are two ways to review the list:

   - To review the list offline, click **Download CSV** and save the report as an Excel spreadsheet. Review the list of names and identify the users that you want to delete from the system. Run the report again using the function code LIUTBD, then proceed to step 4 below.

   - If you're ready to clean up the list of inactive users now, scroll through the list onscreen and identify each one that needs to be deleted. Proceed to step 4 below.

4. To delete a user from CDK Drive:

   a. Click the **Delete Now** button that corresponds to the user's name.

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Inactive User Preview Report

The following users have been inactive for 30 days. You are encouraged to review the inactive users on the report and delete the appropriate users. More Information

| Search Users names and ID's | 🔍 |

Download CSV

Tst2 MEK	mektst2		elete Now
Mek Test	mektst3		elete Now
MIKE COLVIN	miketest		elete Now
MILTON DIAZ	milton	09/26/2018	Delete Now
pat pat	pat		**Delete Now**
Patrick Kelley	pk	03/31/2020	Delete Now
Patrick Kelley	pktestsq	04/01/2021	Delete Now

> **Message from webpage** ✕
>
> ❓ You are going to permanently delete the user "pat". Are you sure?
>
> OK   Cancel

NOTE: You can access this report anytime with LIUTBD function code on the SEC menu.

    b. In the message that displays, click **OK** to permanently delete the user from CDK Drive. If you don't want to delete this user, click **Cancel** to close this message without deleting it.

5. Repeat steps 4a-4b above for each user that needs to be deleted from CDK Drive before the upgrade.

6. Once you have deleted the users that no longer work for your dealership and no longer need to use CDK Drive, proceed to the next section, *Check for Missing Email Addresses*.

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Check for Missing Email Addresses

The email address is a critical part of the upgrade to CDK Simple ID for Drive. A person's email address allows them to reset their own password. Each user must have an email address that is unique. If multiple users share the same email address, this will cause the upgrade to fail, which is why it's critical for each user profile in Drive to have a unique email address.

The **Email Addresses Report** lists all Drive users that have a user profile in CDK Drive, including actual physical users and system process users. Use this report to review your list of users, identify the ones that either don't have an email address or have an email address that needs to be updated. For example, if a user has an email address on the @gmail domain, and you want to update it to a more appropriate @dealername domain, you can make that change while viewing the report onscreen.

Keep this in mind when reviewing the report:

- Does each user profile have an email address? If not, add a valid email address. It must contain a prefix, the @ symbol, followed by the domain. For example, jonathanb@abcmotors.com is an acceptable format.
- Is the email appropriate for your dealership? All physical users are required to have an email address that will become their new login ID after the upgrade.
- Do multiple users share the same email address? Make sure each user profile has a unique email address.

1. In CDK Drive, search for the function called **EDOM**. Enter this function code in the *Launch* field in the top left corner of the screen or in the *Quick Launch* menu on the right side of the screen. As shown in the example below, the **Email Addresses Report** shows all users and groups them by domain.
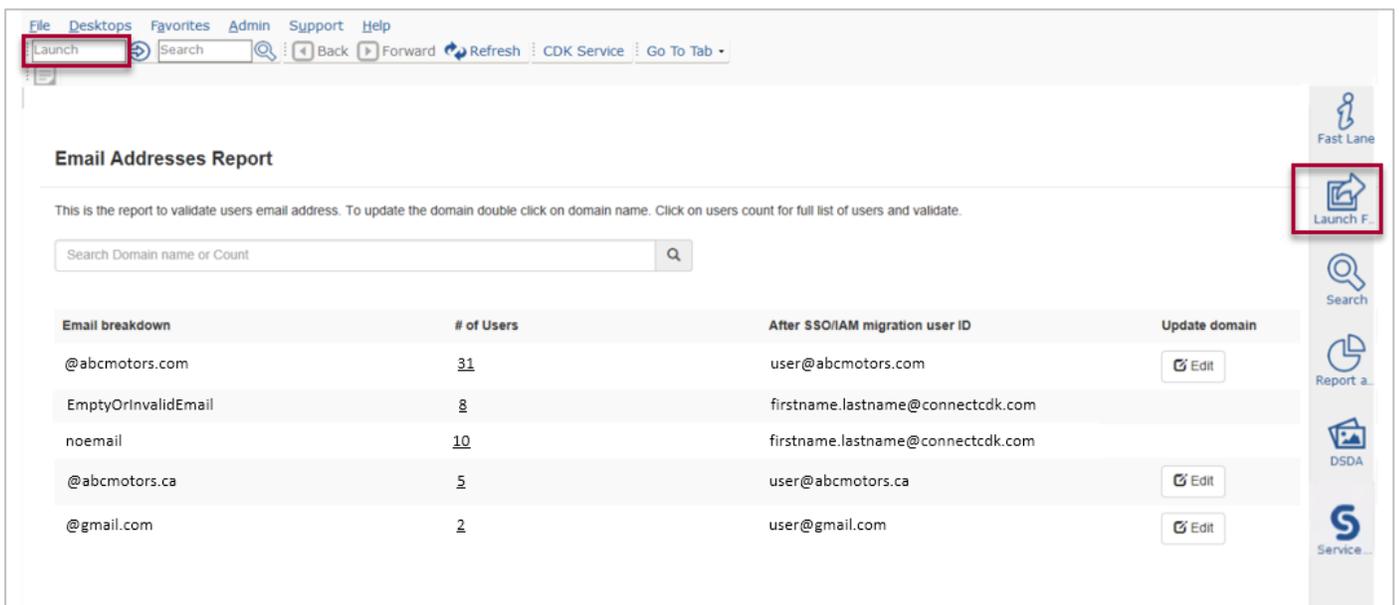
2. Review the list of users and identify the ones that need to be updated. You can review the list onscreen.

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Column in the report	Description	Pay special attention to these groups. They contain user profiles that are missing the email address. A user profile won't get migrated if the email address is missing.
Email breakdown	Each row represents an email domain or group of users at your dealership.	**@noemail.com** – These user profiles don't have an email address in the Email field. **noemail** – These user profiles have the text 'noemail' in the email field. **EmptyOrInvalidEmail** – These user profiles either have no email address, or the email addresses don't follow the format "username@domain"
# of Users	Number of users with an email at that domain.	
After SSO/IAM migration user ID	This is the format the user will use when logging into Drive after the upgrade.	
Update domain	Use the Edit button to edit all users at this domain, at the same time.	

3. The first column in the report, **Email Breakdown** may contain a number of different domains/groups of users. Each row represents a group of Drive users at that domain. For example, your dealership might use domains such as @dealername, @gmail, @hotmail. If any of your Drive users don't have an email address in their Drive user profile, you will also see **@noemail**, **noemail**, or **EmptyOrInvalidEmail** in the list. Pay special attention to those last three. They contain user profiles that are missing the email address. A user profile won't get migrated if the email address is missing.

4. For each line in the report, complete the following steps to review and update the users as needed.

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a. Locate the users you want to edit, for example **noemail**, **@noemail**, or **EmptyOrInvalidEmail**. These 3 groups contain user profiles that are missing the email address. A user profile won't get migrated if the email address is missing.

b. There are two ways to edit user emails; one user at a time, or all users under the same domain. Choose the method that works best for you.

    i. Click the number next to the domain (e.g.: **@noemail.com**) and add an email address one user at a time. See image below.

       This method gives you more control over the email address and domain format for each user. Click **Close** when you're done updating the necessary users.

Users with "@noemail.com"
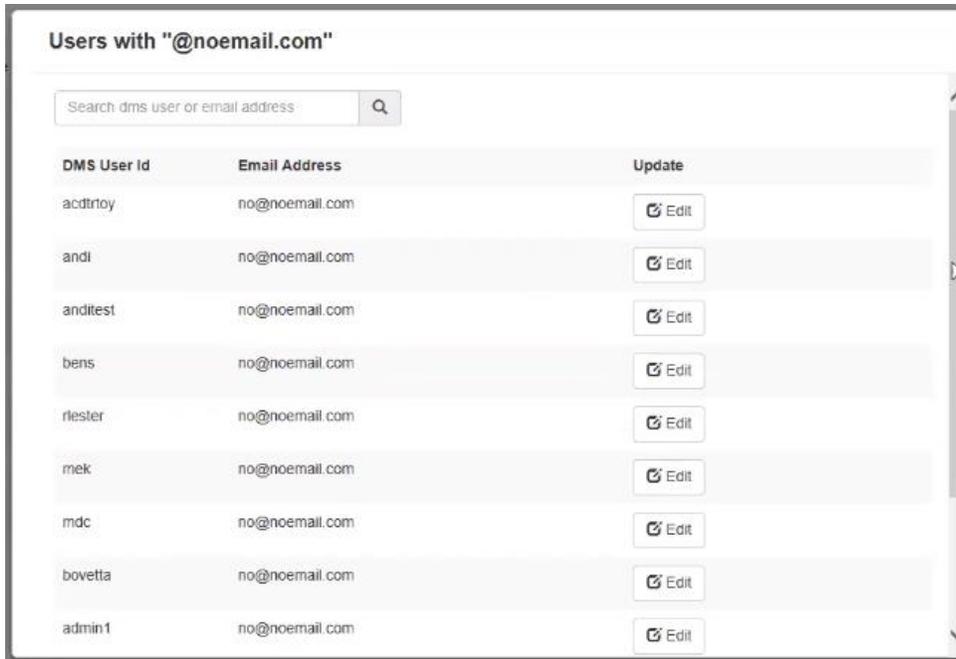
DMS User Id	Email Address	Update
acdtrtoy	no@noemail.com	☑ Edit
andi	no@noemail.com	☑ Edit
anditest	no@noemail.com	☑ Edit
bens	no@noemail.com	☑ Edit
rlester	no@noemail.com	☑ Edit
mek	no@noemail.com	☑ Edit
mdc	no@noemail.com	☑ Edit
bovetta	no@noemail.com	☑ Edit
admin1	no@noemail.com	☑ Edit

ii. Click the **Edit** button at the end of the domain line to edit all users at the same time. See image below.

Use this method if you want to assign the same email format and domain to every user at that domain. When you're done updating a domain, click **Save**.

5. Repeat steps 4a-4b to check each domain (row) and update the users and domains as needed before your dealership upgrades to CDK Simple ID for Drive.

Check Trusted Sites

In order for users to successfully log into Drive after the migration to CDK Simple ID, there are two websites that must appear in the Internet Explorer Trusted Sites list on the PCs that are used for CDK Drive:

*.connectcdk.com

*.okta.com

Follow the instructions below to check Internet Explorer and add these websites if they are missing from the Trusted Sites list. Do this on each PC that employees use to access CDK Drive.

1. Open Internet Explorer.

2. Click the gear icon in the top right corner, then click **Internet options**.

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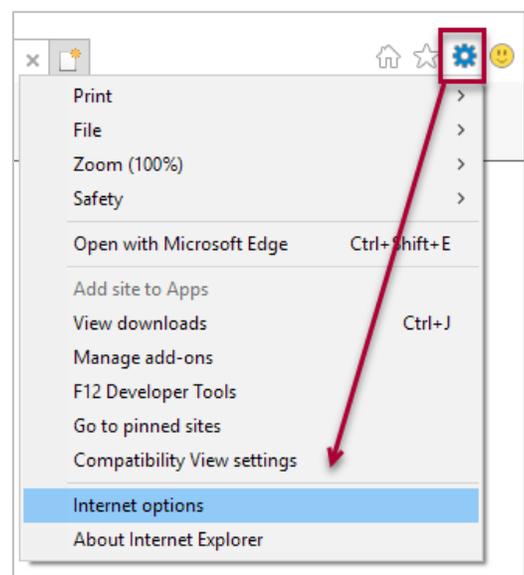
3. Go to the **Security** tab, click **Trusted sites**, then click the **Sites** button.
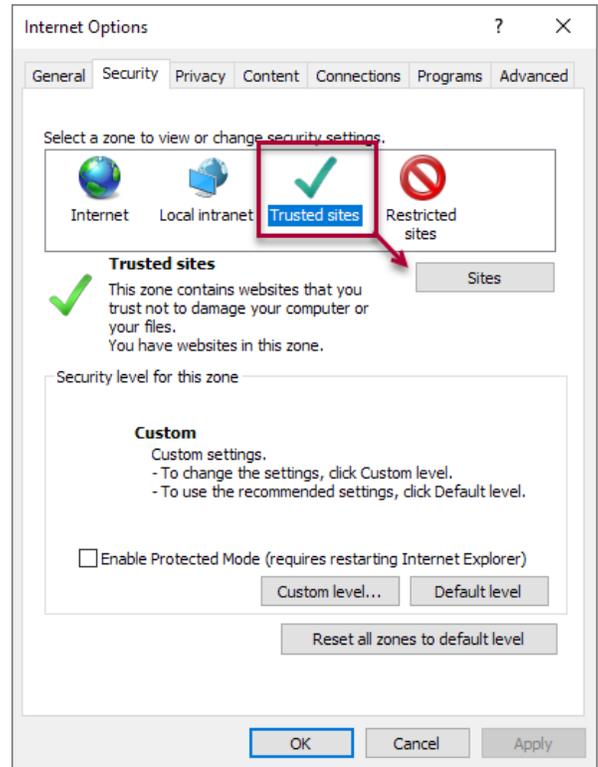
4. Scroll through the Websites list and look for these two websites:

   *.connectcdk.com
   *.okta.com

5. If both websites display in the list, close Internet Explorer, and check the next PC. If one or both are missing, proceed to Step 6 to add them.

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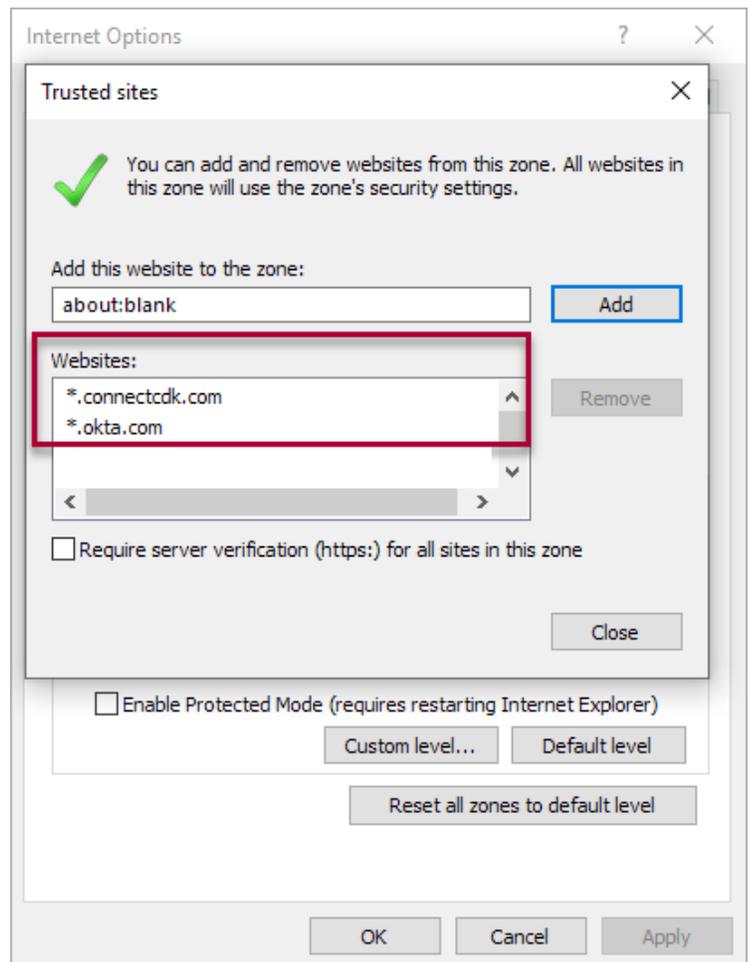
6. To add a missing website(s) to the list:
   a. Place your cursor in the "Add this website to the zone" field, and erase any text in the field.
   b. Enter the missing website, for example ***.okta.com**
   c. Click the **Add** button.
   d. If the other website is missing, repeat steps 6a to 6c to add it.
   e. Click **Close** after confirming the two websites appear in the list.
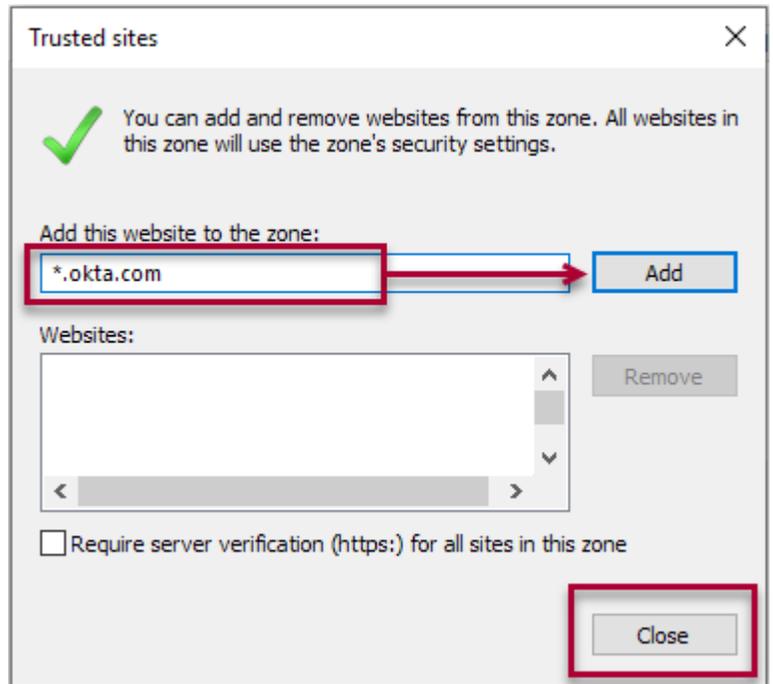
7. Click **OK** in the Internet Options window.
8. Repeat Steps 1 to 7 on each PC that employees use to access CDK Drive.

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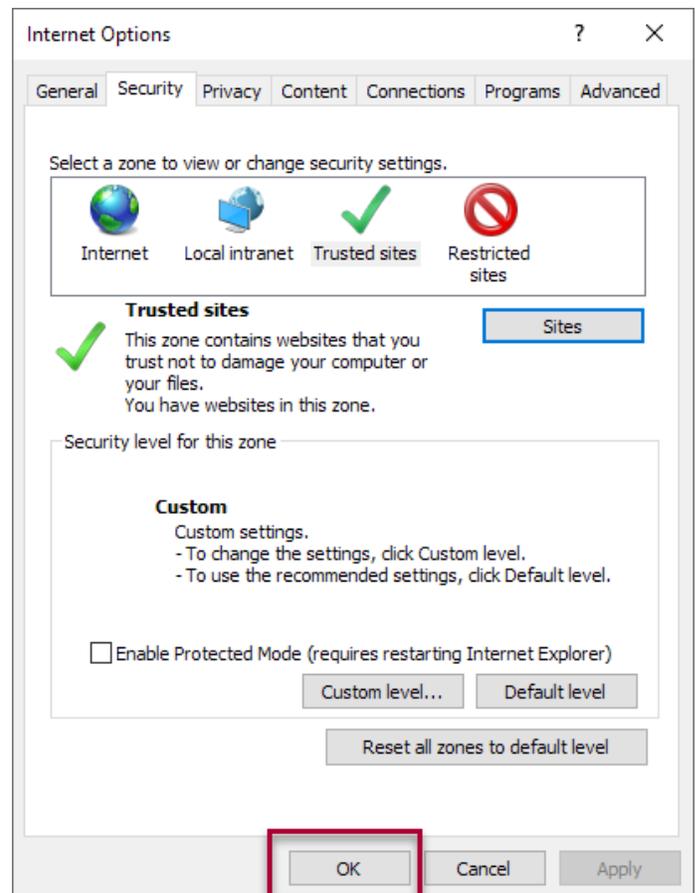
Verify Current Version of CDK Lane and Mobile Desktop on your Mobile Devices

As a part of the migration process, if you are a CDK Service customer, please ensure you have updated your CDK Lane and Mobile Desktop apps to the latest versions from either the Apple Store or the Microsoft Store.

▶ CDK Lane – update to current version on iPads and/or Microsoft Surface Pros.
▶ CDK Service Mobile Desktop – update to current version. Only available on iPads.

IMPORTANT! *If a mobile device is not running the latest version of CDK Lane and/or Mobile Desktop, users won't be able to log into those apps on that device.*

Check the CDK Lane version on an Apple iPad

1. Open the CDK Lane application on the Apple iPad.

2. Tap on the menu in the top left corner. The version number displays in light gray text, as shown above.
3. Go to the Apple Store and search for "cdk lane" and download the latest version. If you see the OPEN button instead of the update/cloud button, it means this iPad has the current version.
4. Repeat these steps on each Apple iPad that uses CDK Lane.

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Check the Mobile Desktop version on an Apple iPad

1. Open the Mobile Desktop application on the Apple iPad.
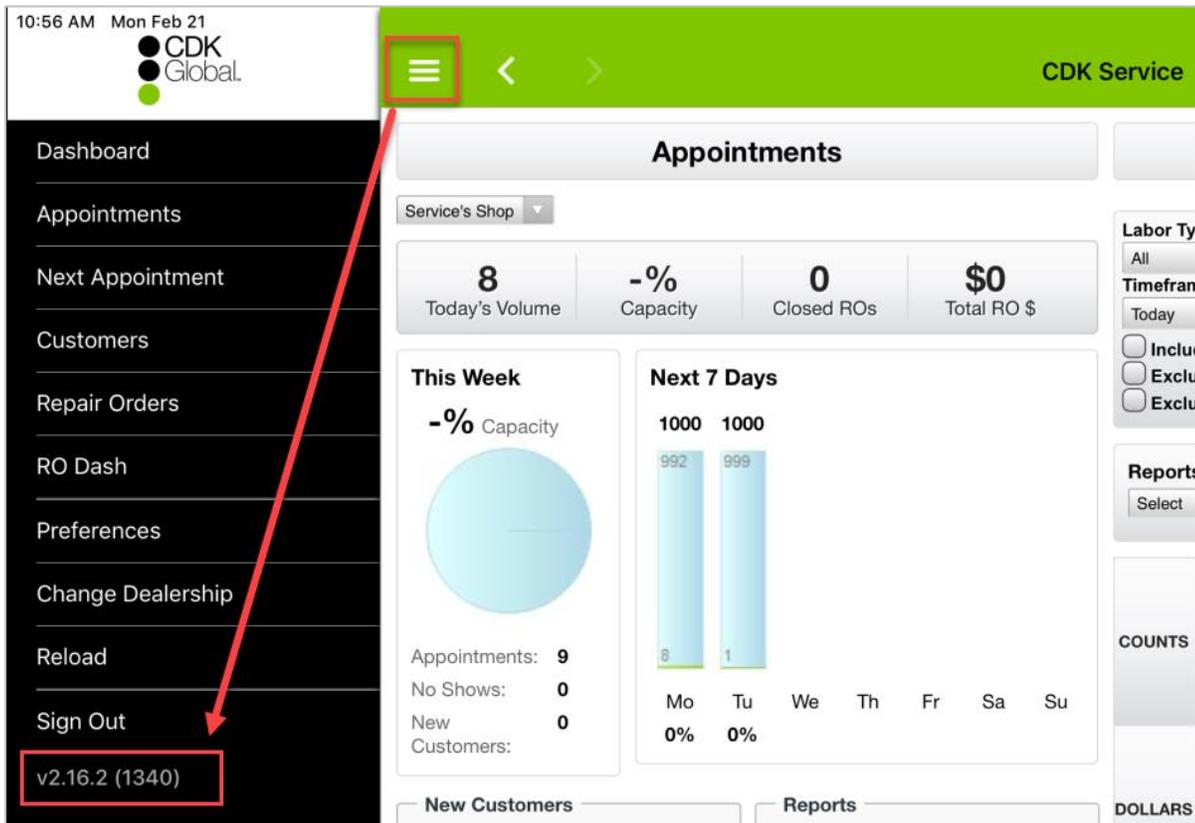
2. Tap on the menu in the top left corner. The version number displays in light gray text, as shown above.
3. Go to the Apple Store and search for "cdk service mobile desktop" and download the latest version. If you see the OPEN button instead of the update/cloud button, it means this iPad has the current version.
4. Repeat these steps on each Apple iPad that uses Mobile Desktop.

Check the CDK Lane version on a Microsoft Surface Pro

1. Open the CDK Lane application on the Microsoft Surface Pro device.
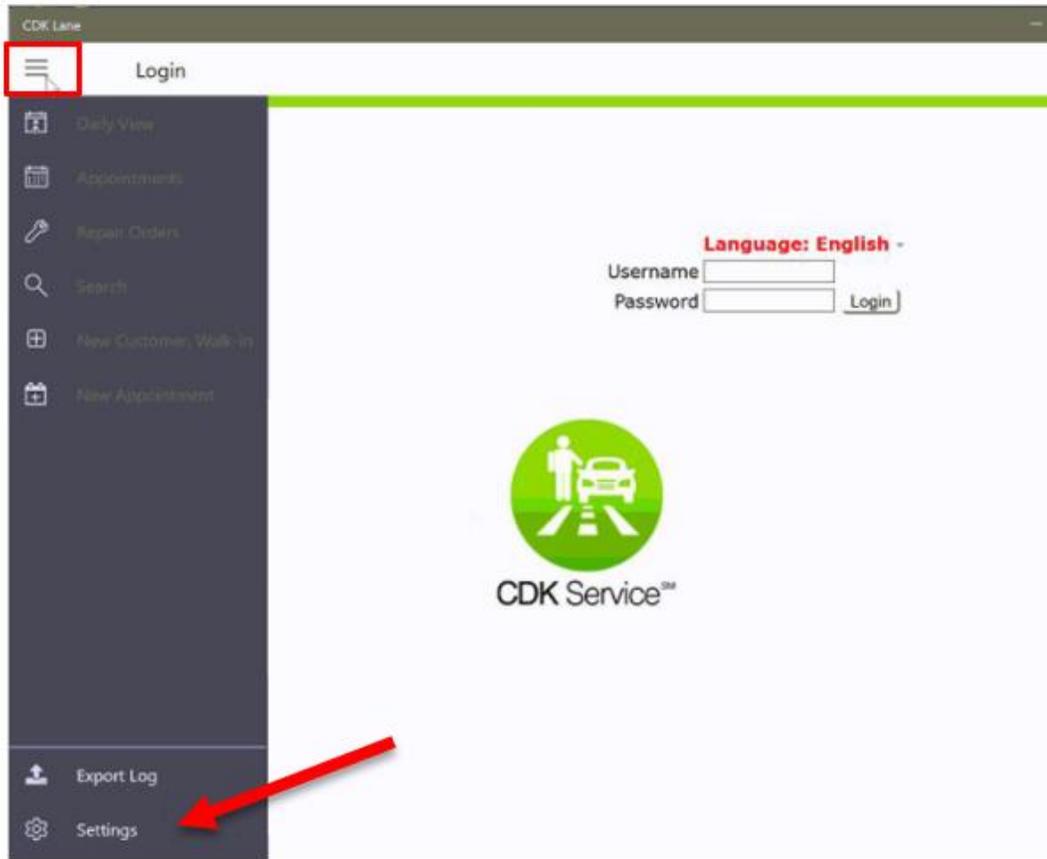
2. Tap on the menu in the top left corner, then select **Settings**.
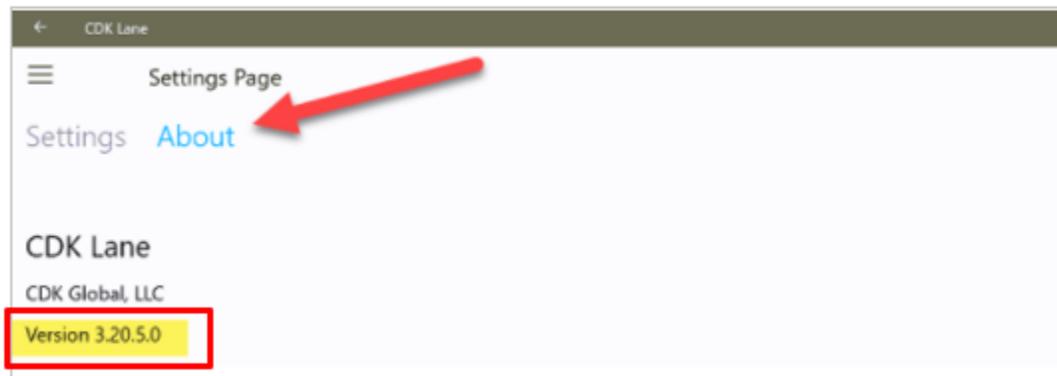
3. Tap **About** and verify the CDK Lane version, as shown above.
4. Go to the Microsoft Store and search for "cdk lane" and download the latest version.
5. Repeat these steps on each Microsoft Surface Pro that uses CDK Lane.

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Bookmark the Documents

Click on each link in the table below to open the corresponding document. We suggest downloading, printing, or bookmarking each one for future reference.

Document	Audience	Description
CDK Simple ID for Drive - Client Bulletin for Drive Users	CDK Drive Users & System Administrators	*FOR NON-FEDERATED DEALERS ONLY* While this document is made available to your users through a notification in Drive, we ask that you share this with every Drive user so they can refer to this information the day after the upgrade. This document explains how to log into Drive after the upgrade, and how a CDK Drive user can change their own password AFTER the upgrade. *Note: If your dealership is Federated, your System Administrator is expected to provide a different set of login instructions that are specific to the IDP used at your dealership.*
CDK Simple ID for Drive - User Management Guide	System Administrators	After the upgrade, new Drive users need to be created in Connect CDK Admin. This document describes how to manage your Drive users AFTER the upgrade; adding new users, managing existing users, and disabling users using Simple ID.

Take the Training

Click on the course name to launch CDK University. You will need your CDK University login to access the course.

Course Name	Who needs to take this course?	Description
6037 - Get Ready for Simple ID	System Administrators	This course provides a high-level overview of Simple ID, and identifies the steps required prior, during, and post migration. (15 mins)
5792 - CDK Simple ID for Drive	System Administrators	This course covers CDK Simple ID for Drive user management. (20 mins)
Managing CDK Simple ID for Drive Users (Live Class – Registration required)	System Administrators	This is an interactive, instructor-led course. Click the name link to see class schedule and to register. This course provides details on adding new users, managing existing users, and disabling users using Simple ID.

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After the Upgrade

After the upgrade, we ask that your System Administrator log into Connect CDK Admin and clean up any duplicate user accounts that may have been created during the upgrade. This can happen if a user had an account in Connect CDK and a user profile in CDK Drive, but the email addresses didn't match.

Here is an overview of the process we recommend you use to safely combine two user accounts into a single account while maintaining all the permissions and setups from both systems, Connect CDK and CDK Drive.

1. Run the report called **Download User List** and look for duplicate names.

2. Review the duplicate user account, the new one that was created during the upgrade. Make note of the settings on the DMS Access tab, unlink the user from the DMS, and then delete the record.

3. Open the user's existing account, the one that contains the user's access to Connect CDK apps such as CDK Hub, CVR, or eSign. Link this user account to the corresponding user profile in Drive to assign their job profiles, accounts, organizations, and default Formqueue printers.

Each part is described in detail below.

Part 1: Run the Report and Look for Duplicate Names

1. Open Connect CDK (www.connectcdk.com) then open the Apps ▦ menu, and select **Admin**.

2. Click **Users** in the left menu, click the **More** menu in the top right corner of the page, and select **Download User List**.

3. Open the CSV file and look for duplicate names.

4. Complete Parts 2 and 3 described below for each user that has two accounts in Connect CDK.

Part 2: Review, Unlink, and Delete the Duplicate User Account

Complete the steps below for each user that has duplicate accounts in Connect CDK.

1. Open Connect CDK Admin (www.connectcdk.com), go to the **Users** tab and search for the user's last name. If the user has two accounts, their name will appear twice in the list.

2. **View** the user's new account, the new one that was created during the upgrade.

3. Go to the **DMS Access** tab, and make note of the job profiles, accounts, organizations, and printers assigned to this user.

4. Go to the **General** tab, then click the **Unlink** button. This removes the link between the user account in Connect CDK and the user profile in CDK Drive.

5. As a final step, click the **Delete** button to permanently remove this duplicate account from the system. Proceed to Part 3 below.

Part 3: Update the Existing User Account

After unlinking and deleting the duplicate user account, you need to update the existing user account by linking it to the corresponding user in Drive. This will add all the user's CDK Drive job profiles, accounts, organizations, and default Formqueue printers to their Connect CDK account.

1. Open Connect CDK Admin (www.connectcdk.com), go to the **Users** tab and search for the user's last name.
2. **View** the user's account.
3. On the **General** tab, find the *DMS Users* section and click **Link Users**.
4. Select the Cnumber in the window that displays. The Cnumber identifies your Drive system.
5. In the *Link DMS User* window, search for the user in Drive by entering their last name.
6. Select the name and click the **Link** button. You have successfully combined the duplicate user records into a single record.
7. If you have other user accounts that need to be combined into a single account, repeat Parts 2 and 3.

Frequently Asked Questions

CDK Simple ID for Drive Upgrade

1. **What is CDK Simple ID for Drive?**

   CDK Simple ID for Drive allows users to access their Drive DMS and other CDK applications with a single username and password.

2. **Why are we moving to CDK Simple ID?**

   Security and ease of user management are the main reasons.

   o CDK Simple ID utilizes modern authentication technology to protect the dealership from unauthorized access, including a password that the user can change to keep their account safe.

   o For administrators, CDK Simple ID gives the ability to grant access across dealerships, DMSs and CDK products all from one place.

3. **What does this upgrade mean for my dealership?**

   Dealership employees will soon log into CDK Drive using their new CDK Simple ID, which in most cases will be in email format. This Simple ID will also give a user access to other CDK applications that the dealership has purchased such as CDK Hub, eSign, and Connected Store, just to name a few.

4. **How is this different for the Drive User Administrator in my dealership?**

   New CDK Drive users will be provisioned using the Connect CDK portal, where they can also get access to other CDK applications such as eSign, CVR, and Connected Store. If your dealerships have multiple locations and/or multiples DMSs, access can be granted from one place. When an employee leaves the dealership, administrators can also disable them from one spot.

Questions about the Upgrade

1. **CDK is scheduling dealers to upgrade to CDK Simple ID based on DMS readiness.**

   Dealers will be scheduled to upgrade once their DMS meets certain criteria, most notably, all users must have a valid email address in their Drive user profile (UUP).

2. **How will we be notified when it's our turn to upgrade?**

   One week before the upgrade, pop-up notifications will start to appear when users log into CDK Drive reminding users of their upcoming upgrade. They will be asked to download a document to assist them the morning of the upgrade.

3. **Why do users need to have an email address in CDK Drive?**

   Their email address is their personal unique identifier and it will be used as their CDK Simple ID. Foundation for increased security through two-form factor authentication.

4. **Can a user use their current Drive login credentials as their CDK Simple ID?**

   In most cases, a user will need to click the new CDK Simple ID for Drive icon and enter their CDK Simple ID (email address) to log into Drive.

5. **What happens if a user is already set up in Connect CDK for another application?**

   If a user already has a Connect CDK Account (for products such as CDK Hub, eSign, and Connected Store) the user will log in to Drive with their CDK Simple ID (email address) and password and will now have access to all Connect CDK applications they are authorized to use.

6. **What about shared Drive logins?**

   Shared logins are considered a security vulnerability. For security purposes, CDK recommends that each physical Drive user have their own login and password, but we know this does not work for all dealerships. If a shared login on the Drive system has an email address associated with it, it will migrate to CDK Simple ID and be subject to the rotating passwords. If this is unmanageable for your dealership, do not input an email address in UUP for shared logins. They will not be upgraded if they do not have an email address associated.

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Preparing for the Upgrade

What does my dealership need to do to prepare for the upgrade?

Click this link to jump to the section at the beginning of this document that describes the preparation work that needs to be completed before your dealership upgrades to CDK Simple ID for Drive.

After the Upgrade

What does my dealership need to do after the upgrade?

Click this link to jump to the section at the top of this page to learn about the tasks your System Administrator needs to complete after the upgrade.

1. **If any of our employees have trouble logging in after the upgrade, how do I get help?**

   You should start with your normal support channels. They can reach out to the System Administrator at your dealership for immediate assistance. If the administrator needs help, they can call CDK Support at 1-866-668-5394.

2. **Who handles Drive user management after the upgrade?**

   The System Administrator(s) for your Connect CDK products can grant and remove access Connect CDK products for dealership employees. This is the same person who handles setting up users on the Drive system now.

3. **What CDK applications use CDK Simple ID?**

   Here are some of the CDK applications that already use Simple ID.

CDK Hub	New & Used Lot Intelligence
Connect CDK Admin (Common Admin)	Notify
Connected Store	PartScan Inventory (MC9300)
Consumer Privacy Portal	Prospect Management
eSign/Digital Contracting	Quote
Lot Merchandiser	Text Connect

4. **Will the Connect CDK Simple ID eventually be used to access everything CDK?**

   Yes, that is our long-term goal.

5. Drive users are seeing a new icon (CDK Drive Simple ID) on their desktop. When should they use the new icon?

The table below explains which icon an employee needs to use to launch CDK Drive AFTER the upgrade.

	New icon	Legacy icon
Log into Drive using the icon that corresponds to the format of your username.	 Use this icon if your username is your email address.	 Use this icon if your username is not an email address. See examples below.
Sample usernames:	johndoe@dealer.com janesmith@email.com	johndoe jsmith tech1 monthend

There are situations where users will continue to use the legacy icon (black and green icon) and enter their existing username to log into Drive. For example:

- Shared logins for Technicians who share a computer
- Shared logins for users who only log in to CDK Drive to use Electronic Time Clock
- Shared logins for users who need to manage/run the month-end job stack

*Note. If a user doesn't see the new icon called **CDK Drive Simple ID** on their desktop, your system administrator can download the CDK Drive Simple ID icon to the employee's PC from Online Software Distribution.*

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