



Payroll Query Instructions

The Payroll Query Instructions guide you through the data collection process developed for **CDK Legacy Payroll, CDK Payroll Plus, Dominion ACCESS and Reynolds & Reynolds**. You may use the Bookmarks in this PDF document to find specific instructions for your payroll system vendor, or use the following page references:

CDK Global (formerly ADP) Legacy Payroll	Page 2
CDK Global (formerly ADP) Payroll Plus	Page 7
Dominion ACCESS	Page 10
Reynolds & Reynolds	Page 12

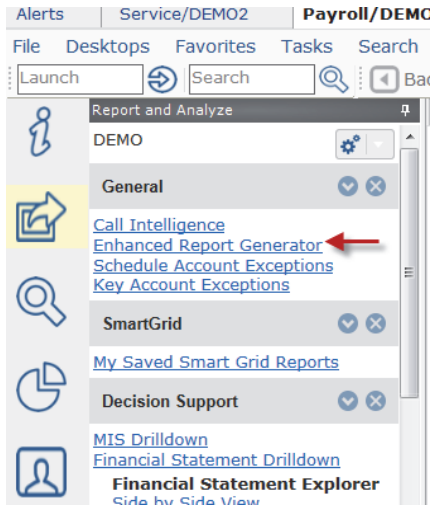
Steps for using these instructions:

1. Extract your payroll data using these instructions or your own instructions of a different payroll provider not listed. If your dealership does not use one of these payroll companies and you are having trouble extracting your payroll data from your payroll system, may we suggest contacting your payroll provider's customer service support team or account representative, as we do not have access to any payroll provider systems and we are unfamiliar with the processes.
2. Once you have extracted your payroll data, **COPY** your data from the Excel or .CSV file produced by your payroll report generator and **PASTE** the data into the **PAYROLL TEMPLATE** provided on the Dealership Workforce Study website.
3. Please read the instructions on the **PAYROLL TEMPLATE** when organizing your data.

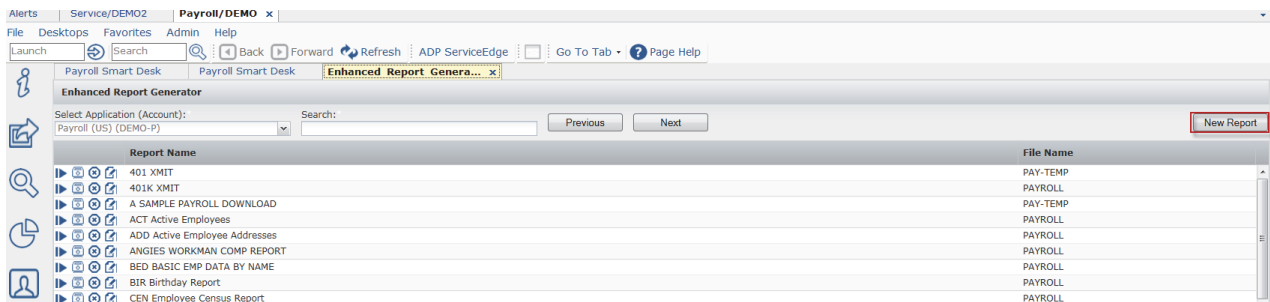
Questions? Call ESI Trends at (727)400-6909 or email Amanda Runkle at arunkle@esitrends.com.

CDK Global Legacy Payroll: Previous Year Compensation Instructions

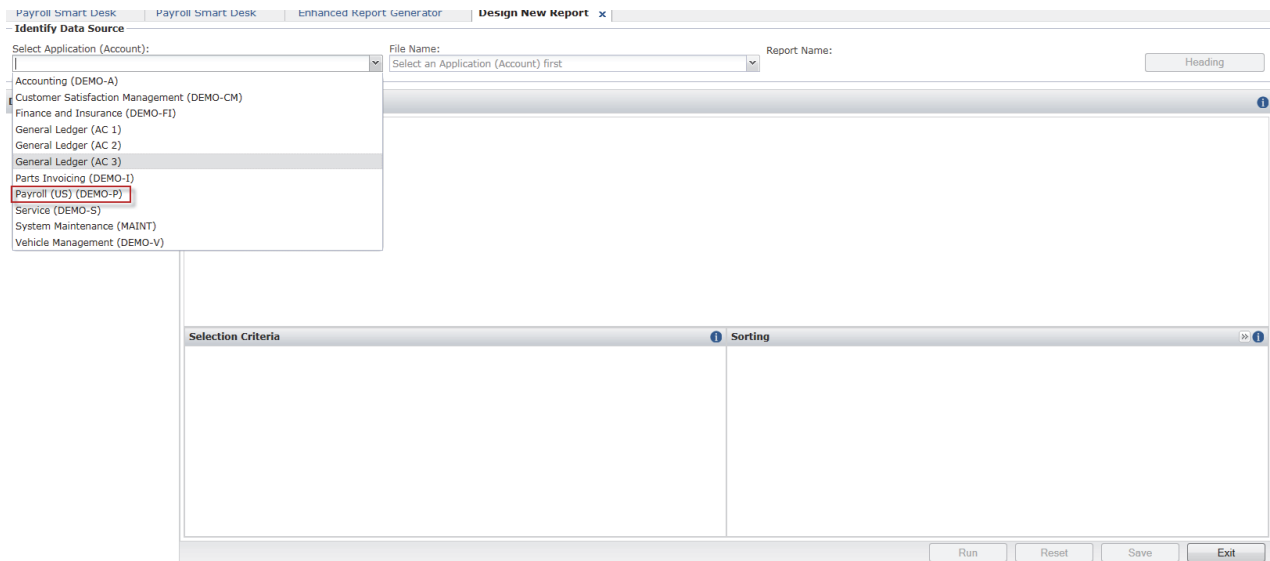
From the **Report and Analyze** Tab, click Enhanced Report Generator.



Click on New Report button.

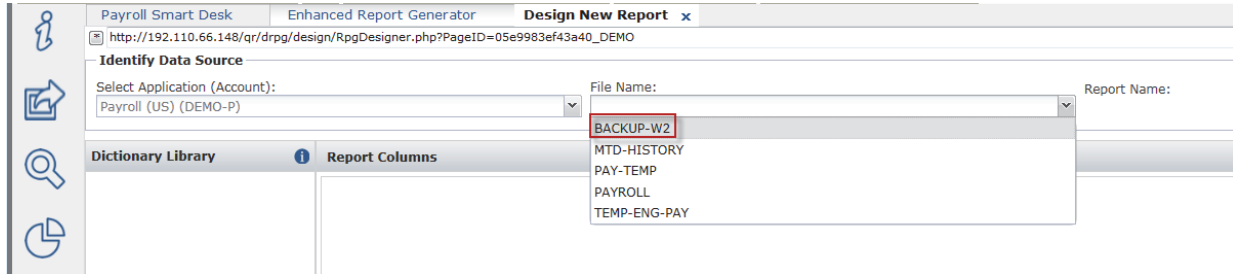


Select Application Account Payroll (xxx-P) from the dropdown list.

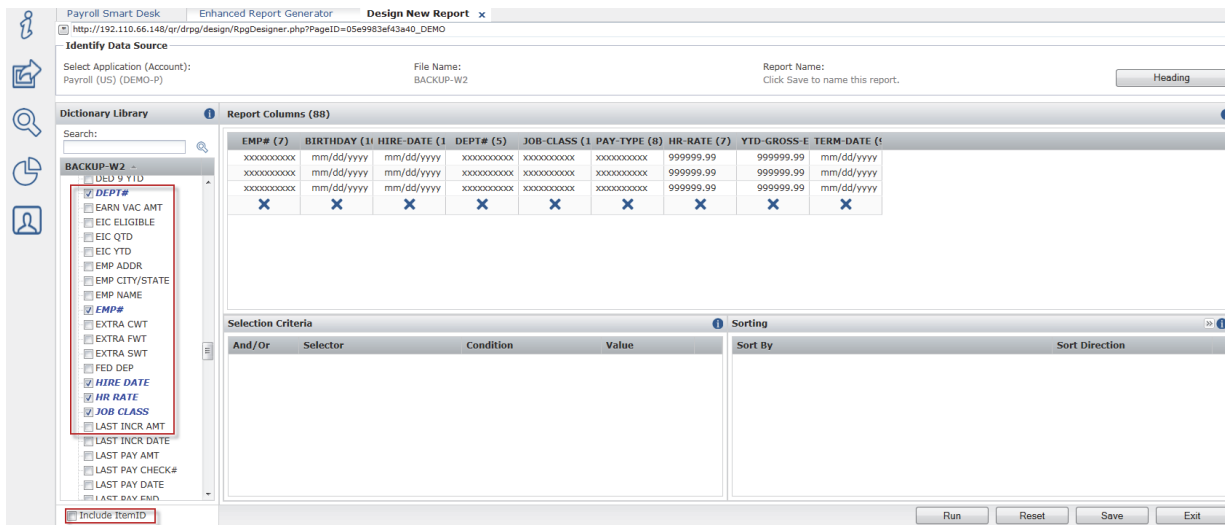


CDK Global Legacy Payroll: Previous Year Compensation Instructions

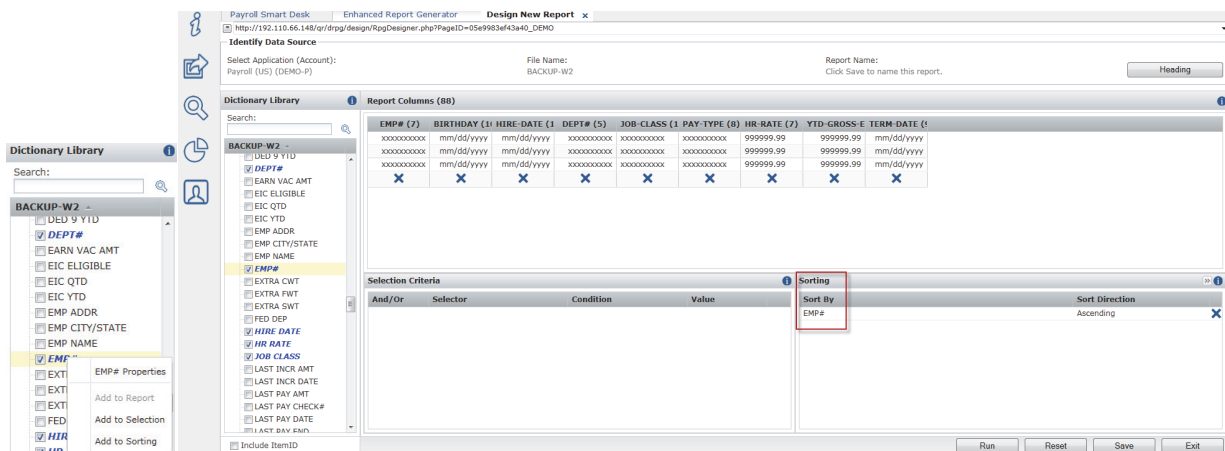
Select File Name BACKUP-W2 from the dropdown list.



From the Dictionary Library List click the check box next to the following fields: **EMP#, BIRTHDAY, HIRE DATE, DEPT#, JOB CLASS, PAY TYPE, HR RATE, YTD GROSS EARN, TERM DATE**
Uncheck the box Include ItemID in bottom left.



Right Click on EMP# in the Dictionary Library List and then click Add to Sorting to have the report sort by employee #.



CDK Global Legacy Payroll: Previous Year Compensation Instructions

Click on Heading Button in upper right to create the report heading. Then click OK.

Build a report heading by typing the appropriate text in combination with any of the following codes:

Code	Action
'C'	Center the heading text
'D'	Inserts the current system date into the heading
'T'	Inserts the current system date and time into the heading
'P'	Inserts the current page number into the heading
'B'	Inserts the current control-break value into the heading
'F'	Inserts the file name for the report in the heading
'L'	Starts a new line in the heading
"	Two successive single quotes print a single quote in the heading text
'NAME'	Prints your dealership name in the report heading

Example:
Custom Report for 'NAME' 'C' 'L' 'T' Page 'P' 'C' 'L'
 The following heading will print on a report sent to a printer.
 Custom Report for Your Dealership Name
 01:23:45 01 JAN 2013 Page 1

Heading:
 PREVIOUS YEAR COMPENSATION FOR 'NAME' 'D' Page 'P' 'L'

OK Cancel

Save the report by clicking on the Save Button in the lower right corner and give it a report name then click ok.

Enhanced Report Generator - Design New Report

Select Application (Account): Payroll (USD) (CDKRD-7) File Name: BACKUP-W2 Report Name: Click Save to name this report.

Dictionary Library

EMP# (7)	BIRTHDAY (1)	HIRE DATE (1)	DEPT# (5)	JOB CLASS (1)	PAY TYPE (6)	HR RATE (7)	YTD-GROSS-E	TERM DATE (1)
XXXXXXXX	mm/dd/yyyy	mm/dd/yyyy	XXXXXXXX	XXXXXXXX	XXXXXXXX	999999.99	999999.99	mm/dd/yyyy
XXXXXXX	mm/dd/yyyy	mm/dd/yyyy	XXXXXXXX	XXXXXXXX	XXXXXXXX	999999.99	999999.99	mm/dd/yyyy
XXXXXXX	mm/dd/yyyy	mm/dd/yyyy	XXXXXXXX	XXXXXXXX	XXXXXXXX	999999.99	999999.99	mm/dd/yyyy

Selection Criteria

And/Or	Selector	Credible	Value

Sorting

Sort By	Sort Direction
EMP#	Ascending

Run Reset Save Exit

Save As

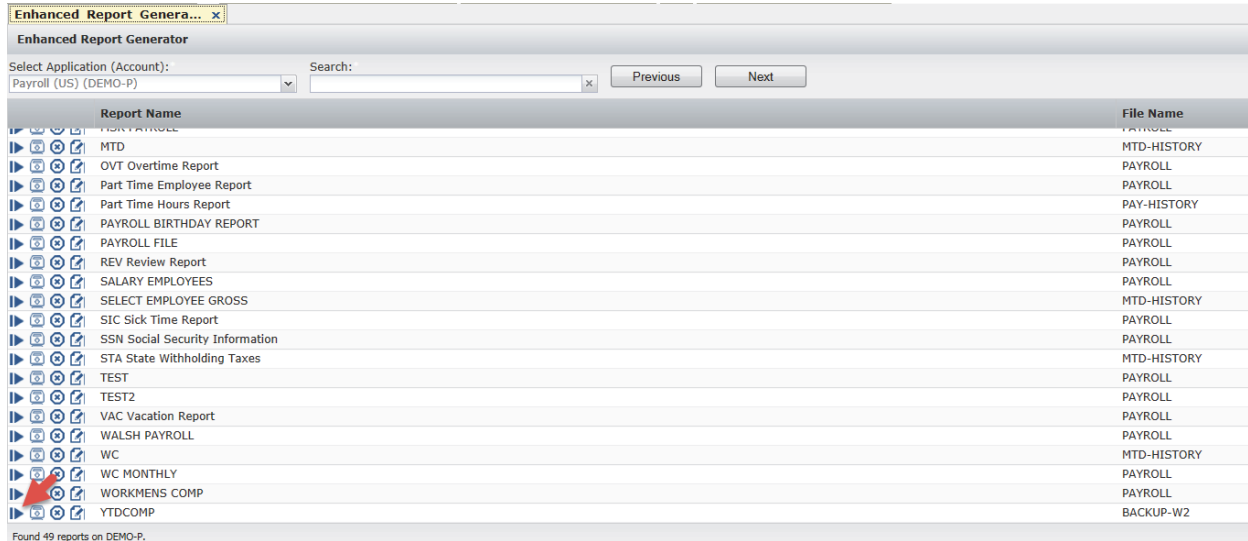
Report Name	Query File
401 XMIT	PAY-TEMP
401K XMIT	PAYROLL
A SAMPLE PAYROLL DOWNLOAD	PAY-TEMP
ACT Active Employees	PAYROLL
ADD Active Employee Addresses	PAYROLL
ANGIES WORKMAN COMP REPORT	PAYROLL
BED BASIC EMP DATA BY NAME	PAYROLL
BIR Birthday Report	PAYROLL
CEN Employee Census Report	PAYROLL
CIT City/Local Withholding Taxes	MTD-HISTORY
COM Commission Analysis Audit	PAYROLL
CYNDI'S	PAYROLL

Report Name: YTDCOMP

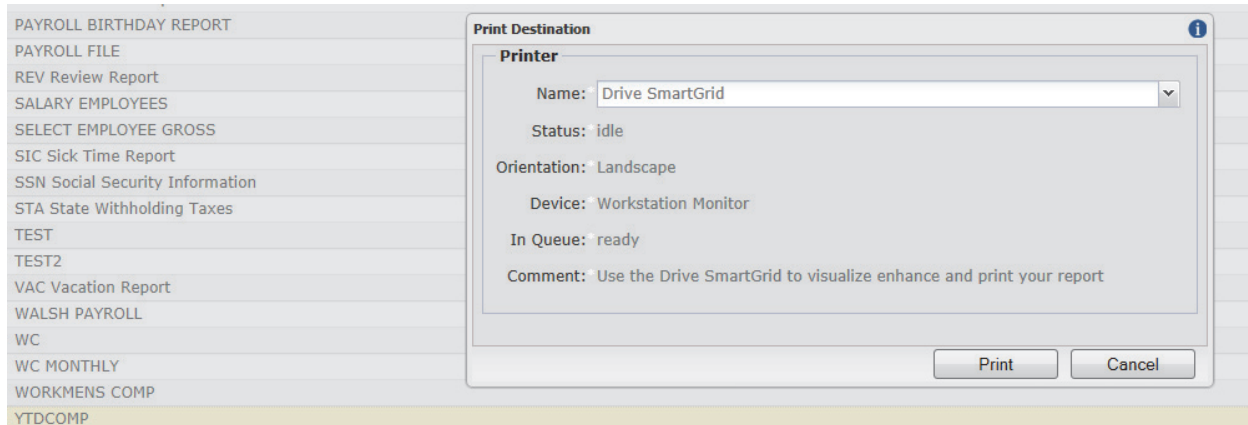
Save Cancel

CDK Global Legacy Payroll: Previous Year Compensation Instructions

Click on Run Icon or double click report name from the list of reports on xxx-P Application Account.



This will open Printer dialog box. Select Drive SmartGrid for printer and click print button to display report on the screen in Drive SmartGrid.



From here you can use the Export tool to export the report to Excel by clicking Smart Grid→Export→Export to Excel.

CDK Global Legacy Payroll: Previous Year Compensation Instructions

Alerts (61 Unread) | Support/ADP | Service/DEMO2 | Payroll/DEMO x

File Desktops Favorites View Smart Grid Admin Support Help

Launch Search Save Export Print Back Forward Refresh ADP ServiceEdge Er

Payroll Smart Desk Enhanced Report Generator Modify Report: YTDCOMP CRPG: YTDCOMP x

http://192.110.66.148/qr/drgp/design/RpgPreviewReport.php?reportID=DEMO-P*REPORTS*46&rptAccount=DEMO-P&checkReportName=YTDCOMP&Applic

Drag a column header here to group by that column.

PREVIOUS YEAR COMPENSATION FOR DEMO-P - 26 Rows Returned

EMP#	BIRTHDAY	HIRE-DATE	DEPT #	JOB-CLASS	PAY-TYPE	HR-RATE	YTD-GROSS-EARN	TERM-DATE
162	11/13/1968	11/13/2000	1	C			90,500.00	
163	11/22/1968	11/22/1968	1	C			110,000.00	
164	11/30/1968	11/30/1998	1	S			110,000.00	
165	03/13/1968	03/13/1990	1	S			57,200.00	
262	01/02/1968	01/02/1999	4	H 14			24,745.00	
264	03/03/1968	03/03/1999	4	H 14			24,640.00	
265	01/10/1968	04/04/1999	4	H 14			24,640.00	
362	03/13/1968	04/09/1998	1	S			59,400.00	
364	04/18/1968	04/18/1998	2	S			59,400.00	
365	04/25/1968	04/25/2000	2	S			59,400.00	
366	04/02/1968	06/06/1988	1	S			59,400.00	
462	05/20/1968	05/20/1998	9	H 17			29,920.00	
464	05/13/1968	05/13/1998	9	S			44,000.00	
466	06/07/1968	06/07/1997	9	S			66,000.00	
563	07/15/1968	07/15/1998	5	S			66,000.00	
564	07/21/1957	06/28/1998	5	H 16.5			29,040.00	
567	01/02/1967	01/01/2012	2	S			88,000.00	
663	08/30/1968	08/30/1998	3	H 17			29,920.00	
762	09/15/1970	07/01/1998	5	H 17.5			30,800.00	
771	09/10/1968	09/10/1998	6	S			44,000.00	
772	09/24/1968	09/24/1998	6	H 16			28,160.00	
773	10/07/1968	10/07/1998	6	H 17			29,920.00	
774	10/18/1968	10/18/1998	6	H 16.5			29,040.00	
775	09/03/1968	09/03/1998	6	H 17			29,920.00	

ADP csr (Ado Csr) DEMO-P | Done

Enhanced Report Generator Display

File Home Insert Page Layout Formulas Data Review View Add-Ins Nuance PDF

Clipboard Paste Font Alignment Number Styles

A1 PREVIOUS YEAR COMPENSATION FOR DEMO-P - 26 Rows Returned

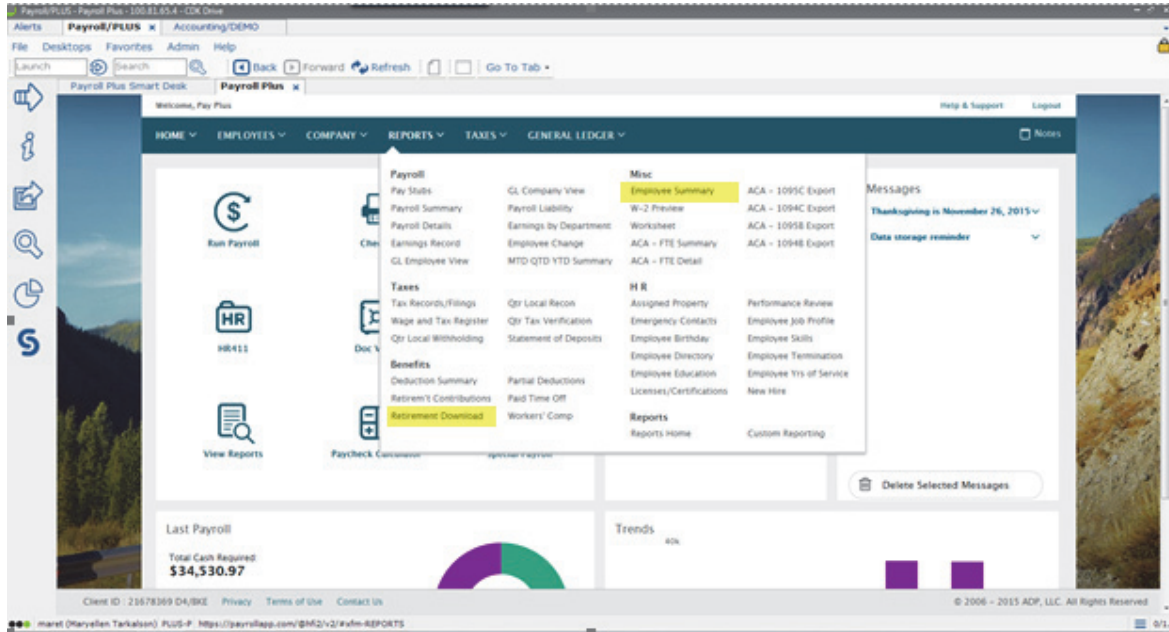
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	PREVIOUS YEAR COMPENSATION FOR DEMO-P - 26 Rows Returned												
2	EMP#	BIRTHDAY	HIRE-DATE	DEPT#	JOB-CLASS	PAY-TYPE	HR-RATE	YTD-GROSS-EARN	TERM-DATE				
3	162	11/13/1968	11/13/2000	1	C			90,500.00					
4	163	11/22/1968	11/22/1968	1	C			110,000.00					
5	164	11/30/1968	11/30/1998	1	S			110,000.00					
6	165	3/13/1968	3/13/1990	1	S			57,200.00					
7	262	1/2/1968	1/2/1999	4	H		14	24,745.00					
8	264	3/3/1968	3/3/1999	4	H		14	24,640.00					
9	265	1/10/1968	4/4/1999	4	H		14	24,640.00					
10	362	3/13/1968	4/9/1998	1	S			59,400.00					
11	364	4/18/1968	4/18/1998	2	S			59,400.00					
12	365	4/25/1968	4/25/2000	2	S			59,400.00					
13	366	4/2/1968	6/6/1988	1	S			59,400.00					
14	462	5/20/1968	5/20/1998	9	H		17	29,920.00					
15	464	5/13/1968	5/13/1998	9	S			44,000.00					
16	466	6/7/1968	6/7/1997	9	S			66,000.00					
17	563	7/15/1968	7/15/1998	5	S			66,000.00					
18	564	7/21/1957	6/28/1998	5	H		16.5	29,040.00					
19	567	1/2/1967	1/1/2012	2	S			88,000.00					
20	663	8/30/1968	8/30/1998	3	H		17	29,920.00					
21	762	9/15/1970	7/1/1998	5	H		17.5	30,800.00					
22	771	9/10/1968	9/10/1998	6	S			44,000.00					
23	772	9/24/1968	9/24/1998	6	H		16	28,160.00					
24	773	10/7/1968	10/7/1998	6	H		17	29,920.00					
25	774	10/18/1968	10/18/1998	6	H		16.5	29,040.00					
26	775	9/3/1968	9/3/1998	6	H		17	29,920.00					
27	850	3/27/1968	12/15/2011	1	S			66,000.00					
28	884	12/7/1968	12/7/1998	1	S			88,000.00					

Exported to Excel Display

CDK Global Payroll Plus: Previous Year Compensation Instructions

From the Payroll Plus Desktop, Reports Tab.

Employee Summary Report and Retirement Download



Retirement Download Report

Select Year 2015, Last pay cycle of the year for begin and end.

Click Export to Excel at bottom of the screen

Sample Extended Retirement Contributions Download

Payroll Plus Smart Desk | Payroll Plus x | Welcome, Pay Plus | Help & Support | Logout

HOME | EMPLOYEES | COMPANY | REPORTS | TAXES | GENERAL LEDGER | Notes

Extended Retirement Contributions Download

Year: 2015 | From: 8/14/2015 - Payroll 1 | Social security no: Mask | Refresh

to: 8/14/2015 - Payroll 1

Social Security Number	Last Name	First Name	Middle Initial	Street Address1	Street Address2	City	State Code	Zip	Email Address	Date of Birth	Date of Hire	Date of Termination	Date of Release	Gender	Marital Status	Pay Frequency	Corporate Officer	Union Employee	Eligible	Division	Eligible Date	Highly Compensated EE	Check Date
xxx-xx-3563	DAMORE	RON		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		07/15/1968	07/15/1998			M	M	Weekly	N	N	N				08/14/2015
xxx-xx-6899	GAVIN	KAY	L	1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		05/13/1968	05/13/1998			F	M	Weekly	N	N	N				08/14/2015
xxx-xx-4457	GOEMMER	DEBBIE		1950 HASSELL RD		HOFFMAN ESTATES	IL	60169		03/27/1968	12/15/2011			F	S	Weekly	N	N	N				08/14/2015
xxx-xx-9334	GREER	LINDA		1950 HASSELL RD		HOFFMAN ESTATES	IL	60169		01/02/1967	01/01/2012			F	M	Weekly	N	N	N				08/14/2015
xxx-xx-2162	HENDRA	STEVE		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		11/13/1968	11/13/2000			M	M	Weekly	N	N	N				08/14/2015
xxx-xx-3663	KRONAWITZER	JOHN		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		08/30/1968	08/30/1998			M	S	Weekly	N	N	N				08/14/2015
xxx-xx-5265	KRUGER	PATTI	A	1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		01/10/1968	04/04/1998			F	M	Weekly	N	N	N				08/14/2015
xxx-xx-1771	MACRI	DALE		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		09/10/1968	09/10/1998			M	M	Weekly	N	N	N				08/14/2015

CDK Global Payroll Plus: Previous Year Compensation Instructions

Exported to Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Social Security Number	Last Name	First Name	Middle Initial	Street Address1	Street Address2	City	State Code	Zip	Email Address	Date of Birth	Date of Hire	Date of Termination
2	xxx-xx-1236	Block	Steven		1950 Hassell Rd		Hoffman Estates	IL	60169		5/12/1970	9/1/2014	
3	xxx-xx-3563	DAMORE	RON		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		7/15/1968	7/15/1998	
4	xxx-xx-6899	GAVIN	KAY	L	1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		5/13/1968	5/13/1998	
5	xxx-xx-4457	GOEMMER	DEBBIE		1950 HASSELL RD		HOFFMAN ESTATES	IL	60169		3/27/1968	12/15/2011	
6	xxx-xx-1234	GREER	LINDA		1950 HASSELL RD		HOFFMAN ESTATES	IL	60169		1/2/1967	1/1/2012	
7	xxx-xx-2162	HENDRA	STEVE		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		11/13/1968	11/13/2000	
8	xxx-xx-5265	KRUGER	PATTI	A	1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		1/10/1968	4/4/1999	
9	xxx-xx-1771	MACRI	DALE		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		9/10/1968	9/10/1998	
10	xxx-xx-2772	MEAGHER	JIM		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		9/24/1968	9/24/1998	
11	xxx-xx-4774	MEYER	DENISE		1950 HASSELL RD		HOFFMAN ESTATES	IL	601952308		10/18/1968	10/18/1998	

Use Excel tools to Hide columns that are not required.

Employee Summary Report

Select Year 2015, Quarter 4, Status: All, Employee: All

Click Export to Excel at bottom of the screen

Sample Employee Summary Report

Employee Information	Earnings		Taxes		Deductions		Disbursement Type	
Description	YTD Amount	YTD Hours	Description	YTD Amount	Description	YTD Amount / Goal		
Pay Frequency: Weekly								
Brock, Nancy 123 Bush Lane Denver, CO 80169 Home Phone: 8476547732 Salary Per Pay: 1500.00 SSN xxx-xx-5599 Hire Date: 8/17/2015 Birth Date: 10/3/1968 Department: 3 - Lease & Rental Dept Status: Active Emp Type: Full time			FIT IL SIT	0.00 0.00	Married - but withheld at higher single rate/0 Not Applicable/0	10.00 0.00	0.00	
DAMORE, RON 1950 HASSELL RD HOFFMAN ESTATES, IL 601952308 Home Phone: 7202529537 Salary Per Pay: 1500.00 SSN xxx-xx-3563 Hire Date: 7/15/1998 Birth Date: 7/15/1968 Department: 5 - Bodyshop Status: Active Emp Type: Full time	Gross 7,750.00 Regular 7,500.00 Demo Earning 250.00	0.00 0.00	FIT SOCSEC MEDICARE IL SIT	789.40 465.00 108.75 263.85	Married/2 Not Applicable/2	401(k) plan \$ 10.00 AFLAC pre-tax 50.00 Demo 50.00	50.00 250.00 250.00	Check

CDK Global Payroll Plus: Previous Year Compensation Instructions

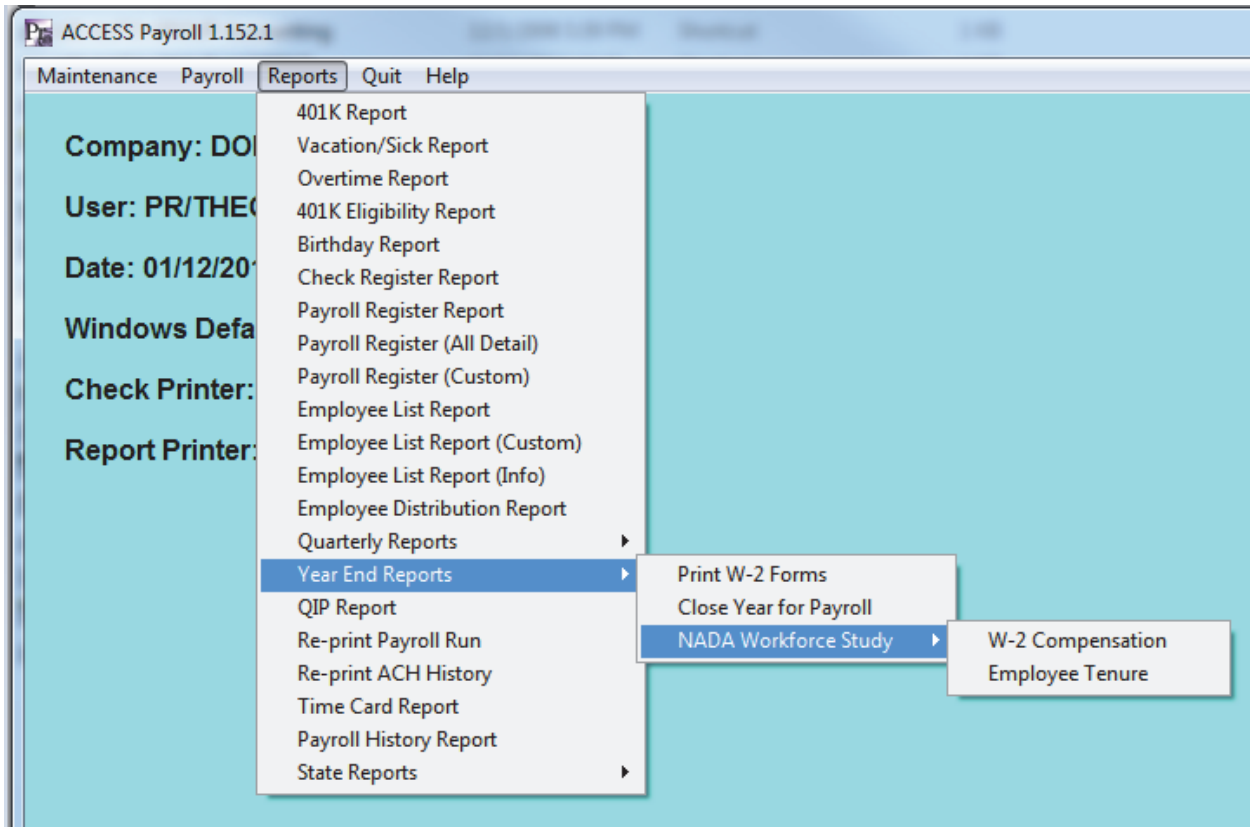
Exported to Excel

Employee Information		Earnings		Taxes		Deductions	
Description	YTD Amount	YTD Hours	Description	Overrides	YTD Amount	Description	YTD Amount / Goal
BLANDFORD, KAREN A Pay Frequency: Weekly 1950 HASSELL RD HOFFMAN ESTATES, IL601952308 Home Phone: 6784450675 Salary Per Pay: 1550.00 SSN: xxx-xx-6366 Hire Date: 6/6/1988 Birth Date: 4/2/1968 Department: 1 - NEW VEHICLE SALES Status: Active Emp Type: Full time							
Gross	38150.00		FIT	Single/1	5738.60	401(k) plan \$	10
Regular	37800.00	0.00	SOCSEC		2278.50	AFLAC pre-tax	50
Demo Earning	350.00	0.00	MEDCARE		532.88	Demo Deduction	50
			IL SIT	Not Applicable/1	1831.90		
Block, Steven 1950 Hassell Rd Hoffman Estates, IL60169 Home Phone: 847-397-1700 Hourly: 15.0000 SSN: xxx-xx-1236 Hire Date: 3/1/2014 Birth Date: 5/12/1970 Department: 1 - NEW VEHICLE SALES Status: Active							
Gross	3600.00		FIT	Single/1	571.50		
Regular	3600.00	240.00	SOCSEC		223.20		
			MEDCARE		52.20		
			IL SIT	Not Applicable/1	173.88		

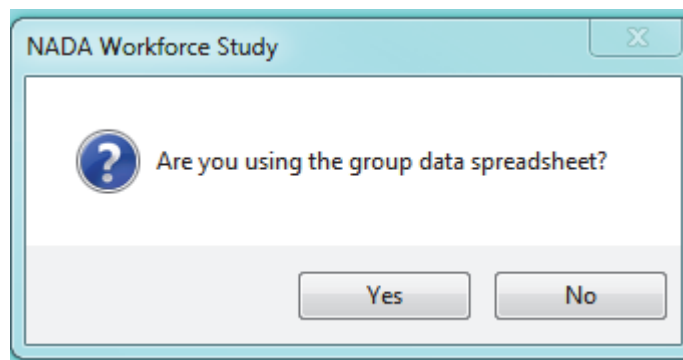
Use Excel tools to Hide columns that are not required.

Dominion ACCESS: NADA Dealership Workforce Study Data Export

To run the data extract, from the menu bar select Reports, then Year End Reports, the NADA Workforce Study, then the desired extract.



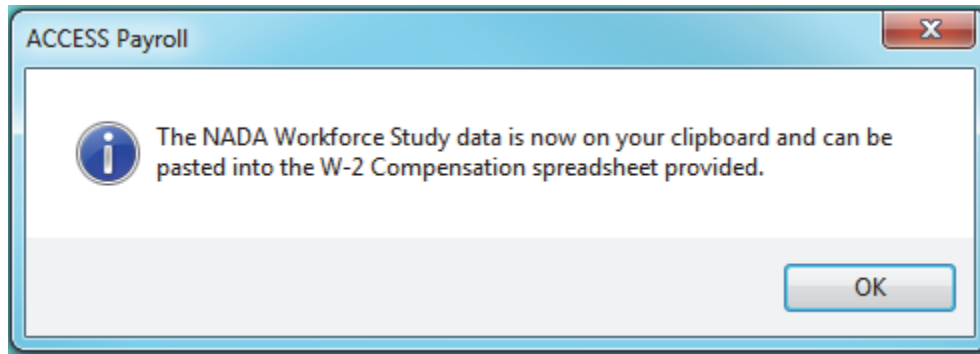
If the company has multiple rooftops operating in Dominion ACCESS, whether as separate payrolls or a combined payroll under one company, the user will be asked if they want to format the data for the group template:



Dominion ACCESS: NADA Dealership Workforce Study Data Export

Selecting “Yes” will leave a space in the data for the “Rooftop NADA Dealer ID” so the dealer can insert this data. The company name(s) will be inserted into the data extract.

Once the data extract has completed, the user will receive a prompt to paste the data into the template:



The prompt will indicate which template should be opened for the data (W-2 Compensation or Employee Tenure) for the selected format (individual or group).

In order for the report to run, the previous year must be closed for payroll.

Reynolds & Reynolds: ERA 2015 W-2 Compensation Instructions

Using ERA-IGNITE **Dynamic Reporting** which is available to all ERA customers, log into ERA-IGNITE and navigate to the Retail Management Intelligence application. (To gain access to Dynamic Reporting call the Technical Assistance Center at 1-800-767-0080, option 1 for ERA-IGNITE and then option 2 for Accounting or Payroll.) Select Dynamic Reporting and then select the F4 to Add New, and then F12 to Add:

Basic Info:

Title: NADA Dealership Workforce Study

Data Set: EMPQYTD-PAYRL

Secured to Owner: Will default to your USERID by may be changed to a different USERID

Access: Private

Store/Branch Selects: Choose the valid Store/Branches

Should look like this:

The screenshot shows the 'Basic Info' tab of the report configuration interface. The fields are as follows:

- Title:** NADA Dealership Workforce Study
- Data Set:** EMPQYTD-PAYRL (with a search icon) **PAYRL**
- Secured to Owner:** PPD14 (with a search icon)
- Access:** Private
- Store/Branch Selects:** A list of branches with dropdown arrows: Reynolds Motors Branch 01, Open Road Motors Branch 01, and an empty row.

SELECTION CRITERIA:

EMPL-TERM-DATE, =, Value, (leave Value/Field blank), And

EMPLMT-DATE, <=, Value, 01/01/15 And

YR4, =, Value, 2015, Or

EMPL-TERM-DATE, >=, 12/31/15

EMPLMT-DATE, <=, 12/31/15

YR4, =, Value, 2015

Should look like this:

The screenshot shows the 'Criteria' tab with a table of selection criteria:

(Field	Condition	Compare To	Value/Field)	And/Or
	EMPL-TERM-DATE	=	Value			And
	EMPLMT-DATE	<=	Value	01/01/15		And
	YR4	=	Value	2015		Or
	EMPL-TERM-DATE	>=	Value	12/31/15		And
	EMPLMT-DATE	<=	Value	12/31/15		And
	YR4	=	Value	2015		

Reynolds & Reynolds: ERA 2015 W-2 Compensation Instructions

Output

EMPL-NO, GENDER-LB, BDATE4-CAT, EMPLMT-DATE4, DEPT-NO, EMPL-POSITION, EMPL-TYPE-LB, RATE-LB, RATE-LB, GROSS-YTD, EMPL-TERM-DATE4

Should look like this:

Field	Column Title	Width	Format	L/R
EMPL-NO	Employee Number	8		R
GENDER-LB	Gender (M or F)	1		L
BDATE4-CAT	Birth Date	10	MM/DD/YYYY	R
EMPLMT-DATE4	Hire Date	10	MM/DD/YYYY	R
DEPT-NO	Department Name	7		R
EMPL-POSITION	Standard Job Title	15		L
EMPL-TYPE-LB	Employee Type	2		L
RATE-LB	Hourly Pay Rates	8	##.###	R
GROSS-YTD	Total 2015 Wages	10	\$#,###.##	R
EMPL-TERM-DATE4	Termination Date	10	MM/DD/YYYY	R

Note that you can change the Column title of each field to be consistent with the requested report headings.

You do not have to enter anything in the remaining tabs, their defaults will work fine.

Press the F12 to Add the Report

The finished report should look similar to this:

Dynamic Reporting Display											
Report # 1065		Report Title Dealership Workforce Study									
Report Detail											
Branch	Employee...	Gender (M or F)	Birth Date	Hire Date	Department Name	Standard Job Title	Employee Type	Hourly Pay Rates	Total 2015 Wages	Termination Date	
26/01	1	M	04/01/1966	09/30/2003	21D		F	\$17.00	\$1,680.00		
26/01	45	M	03/11/1934	01/03/1995	11B	Office Manager	P		\$250.00		
26/01	58422	M	01/03/2014		21D		F	\$20.00	\$800.00		
26/01	6634	M	09/27/1989	01/01/1992	247	Manager	F	\$45.62	\$1,824.80		
26/01	7324	F	12/01/1981	01/30/2012	247	MANAGER	F		\$3,842.33		
26/01	7370	F	02/10/2009		11A	SALESPERSON	F		\$576.92		
26/01	7882	F	07/16/1963	02/05/2010	22A	CLERICAL	F	\$8.50	\$340.00		
26/01	7890	F	02/14/1965	01/01/1997	247		F	\$18.50	\$740.00		
26/01	8674	M	02/17/1968	01/18/1998	23F		T		\$1.92		
27/01	1	M	01/01/1971	10/15/2005	247	ADVISOR	F	\$26.00	\$1,040.00		
27/01	10	M		01/20/2004	247		F		\$769.23		
27/01	10000	M	03/03/1963	01/24/2009	247		F		\$2,403.85		