

Basics Series-4003

# **Batch Processing**

Version 9.0

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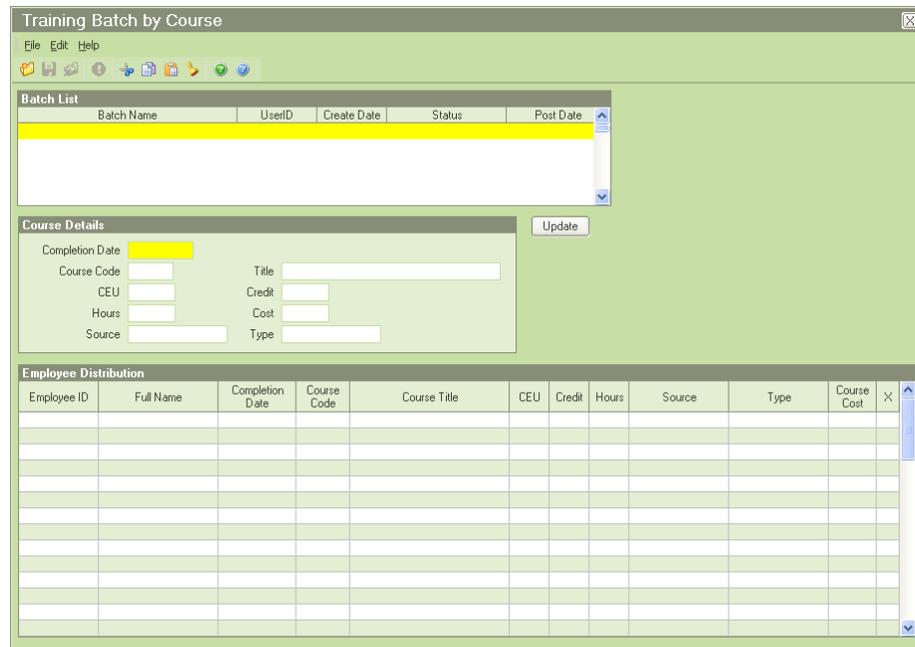
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## Notes



Grid style screens are normally used when a complete record can be entered on a single line in the grid. For example, a complete performance review can be entered as shown in the sample above.

## Combo Style



Combo style screens are normally used when a collection of information is to be entered once and then a group of records is to be specified. For example, if a number of employees took the same training course, you would not wish to key the course information over and over again. With a combo style batch processing screen, you key the course information using text boxes and check boxes, and then use a simple grid to select the employees to be updated, as shown in the sample above. When the batch is posted, the records are updated one by one. Each record that is posted uses the same information from the text boxes and check boxes that have been completed.

## Standard Data Entry Conventions

The fields used in batch processing screens reflect the same characteristics and attributes that the fields possess on the normal data entry screens. For example, on a batch processing screen used to post training records, the training code and related fields act exactly like the training code field on the Training History screen. If the field is supported by a table on the Training History screen, the field is supported by a table in the batch processing screen.

## Lookup for Batches

All batch-processing screens provide a means of selecting the records to be processed. In simple grid style screens and in the record grid of a combo style screen, the first field is the ID field for the module and the second field is either a name or a description that is used to describe the record. You can select a record using either the ID or the name column by entering a full or partial ID or a full or partial name. If the ID or name entered is a direct match for a single record, the ID and name fields are completed and the cursor is positioned to the third column. If the ID or name entered matches multiple records, the Select Employee screen is displayed.

The screen contains a list of the records that match the criteria entered. You can select from these records by scrolling to the desired record and highlighting it. Then, double-click or click the OK button.

## Pre-Populating a Batch

Batch processing screens are normally populated one record at a time as described above. However, you can populate the ID and name for a group of records using the Lookup Group option on the File menu. The Lookup Group option activates the same Lookup screen that is used to select records for data entry and returns all of the records that meet the Lookup criteria. You can use all five tabs on the Lookup screen including any favorites you have defined for the Favorites tab.

This method is especially useful with combo style screens. You can define the fields to be updated and then select all of the applicable records with one lookup. For example, if you were using the a combo style screen for the purpose of batching in training records for a department that attended the same training course, you could record the training course detail and then select all of the employees who received that training using a simple query on the Lookup screen. This would be far faster than selecting the individual employees one at a time.

If you use this feature with grid style screens, the first columns are filled with the ID and names for the records selected. You must then complete the remaining fields on each line. This technique can still be very beneficial because the list of names becomes a checklist. You know the batch has been entered when you have completed the data entry for each name displayed. For example, if you needed to perform attendance batch processing for every employee in a specific department, you could use the Lookup screen to select those records. Once the records have been returned in a list, you could then enter the remaining fields for each record to complete the process. If you had created a lookup favorite for each department, this would make the process even more efficient.

## Posting a Batch

When a batch has been entered, it can be posted using the Post Batch button on the Tool Bar or the Post Batch option on the File menu. The changes are updated to the database immediately and an audit trail of the changes can be produced. A sample from a batch audit trail is shown below.



Zee Technology, Inc.  
Batch Posting Audit Trail  
Performance Batch

Employee ID	Full Name	Initiation Date	Completion Date	Appraisal Type	Appraiser Type	Appraiser	Items Rating	Next Appraisal Date	Next Appraisal Type	X
1005	Carrington, Julie E.	07-28-2011	07-28-2011	Annual	Manager	Arthur J. Brown	3.00	07-27-2012	Annual	Yes
1006	Stern, Donald E.	07-28-2011	07-28-2011	Annual	Manager	Mary J. Lutz	4.00	07-27-2012	Annual	Yes

As the changes are updated to the database, the existing records are pushed down (record one becomes record two, record two becomes record three, etc.) so that the first record is blank. The entry coming from the batch processing option is then added as a new record one. Thus, no existing data is lost via this process and the standard sort that places newest records on top is preserved.

As records are posted, they are updated with an 'X' in the last column of the grid to show they were posted. Records that are posted will not be posted again if they are part of a

partially posted batch. If all the records in a batch are posted, all of the entries in the batch are set to display only and the status of the batch is set to 'Posted'.

## Records That Are In Use

If a record selected for batch processing is in use at the time the batch is posted, the record is not posted, it is not included on the audit trail, and it is not marked as posted. If a batch has unposted records, a message will be displayed indicating that the remaining records could not be posted. You have three choices for the unposted records; you can:

1. Delete the records from the batch and add the records to another batch at a later time,
2. Contact other users and ask them to exit the records in use so that you can try posting again, or
3. Save the batch and attempt to post the records at a later time.

## Postponing a Batch

Batches that have been started and have not been posted can be postponed for posting at a later date. This is useful when you are entering batches for specific groups. If you do not wish to post a partial group, but must perform another task, you can postpone the batch and return to it later when you have more time. In addition, when you post batches, records that are in use when you attempt to post are left in the batch and are not posted. One of your options is to postpone the pending records and try to post them later.

To postpone that batch until later, all you have to do is save your changes. Saving a batch is just like saving a record or a document. If you want to save the batch and work on another, you would simply use the Save option on the File menu or Tool Bar, and then create a new one or select another from the list. If you want to leave the batch process altogether, use the Exit option, which saves and closes the screen, or click the 'X' in the upper right-hand corner of the screen and say 'Yes' to save the changes.

## Recalling a Postponed Batch

If you have previously postponed a batch, you can recall it by selecting it from the list of batches in the Batch List area. That batch's entries are displayed in the grid below. You can now pick up where you left off. You can post the batch immediately or you can add records to the batch.

**Note:** Only users with Administrator access (Administrator check box selected in Security Setup) have access to all user batches. This allows them to process a batch in a user's absence. Non-Administrator users only have access to the batches they created.

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## Batch Processes

The following are batch processes available within Essential HR.

**Event Batch:** Used to post status events to the corresponding fields on the Event History sub screen that is located on the Status screen in the employee record.

**Performance Batch:** Used to post results of completed Performance Reviews to the Performance Reviews screen.

**Salary Batch by Employee:** Used to post a salary update for multiple employees without having to navigate through individual records. The changes will be posted to the Compensation History grid and will update the Current Pay frame in the Compensation History screen.

**Salary Batch by Rate:** Used to post a salary update for a group of employees who share the same rate change.

**Other Compensation Batch:** Used to post compensation received by the employee that is not associated with base pay to an employee record. This includes bonuses, commissions, and any other type of alternate pay.

**Training Batch by Employee:** Used to post completed training courses and their details to the Training/ Competency screen in an employee's record.

**Training Batch by Course:** Used to post completed training courses for a group of employees who completed the same training course to the Training/ Competency screen in an employee's record.

**Medical Exam Batch:** Used to post completed medical exam details to the Medical Exam grid on the Medical/ Wellness sub screen.

**Claim Cost Batch:** Used to post claim costs related to an incident and their details to the Cost Details sub screen in an incident record.

**Payment Batch:** Used to post COBRA payments related to an incident and their details to the Payment History grid on the Personal screen.

## Notes

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# Lesson 1

## Batch Processing 1

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This lesson describes the techniques used to load and post batches. It also shows how to postpone a batch that cannot be completed and recall that batch at a later time.

### Tutorials

**Loading a Batch:** demonstrates how much faster batch processing can be than manually entering records. It also shows how the operating conventions for batch processing screens are the same as those in other screens.

**Posting a Batch:** shows how to post a batch and print the audit trail. It also shows how to confirm that a batch entry has been posted.

**Postponing and Recalling a Batch:** demonstrates how to postpone a batch in process and recall that batch at a later time

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## Tutorial 1.1 – Loading a Batch

Before we see how to load a batch, let's demonstrate how Performance Appraisals are keyed without using batch processing.

1. Start People-Trak by double-clicking on the **People-Trak Trainee** icon on your desktop (or as instructed).

The Select Product Option screen is displayed.

2. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the Training button to select them.
3. Click **OK**

The Login screen is displayed.

4. In the **User ID** field, enter **DEMO**.
5. In the **Password** field, enter **DEMO**.

The Organizer desktop is displayed with the Personnel Management module selected.

6. Open **Donald Stern's** record.
7. Move to the **Performance** screen.
8. On the Tool Bar, click the **Insert Row** button to insert a new row for Donald's latest appraisal.
9. Enter the appraisal as shown below:

<b>Initiation Date</b>	<i>Today's Date</i>
<b>Completion Date</b>	<i>Today's Date</i>
<b>Appraisal Type</b>	<b>Annual</b> (the <b>Next Date</b> and <b>Next Type</b> fields are set for you)
<b>Appraiser Type</b>	<b>Manager</b>
<b>Appraiser</b>	<b>Rhoda E. Tyrell</b>
<b>Rating</b>	<i>Leave Blank</i>

10. Close the record, saving your changes.
11. Now select two other records and record the same appraisal, saving your changes.
12. Close any open record.

Now, we will learn how to use batch processing to do the same thing.

13. On the **Processing** menu, select **Performance Batch**.

The Performance Batch screen is displayed. This is an example of a grid style batch processing screen. Grid style screens are normally used when a complete record can be entered on a single line in the grid, which is the case here.

Let's create a new batch.

14. On the **File** menu, select **New Batch** or on the Tool Bar, click the **New Batch** button to create a new batch.

A new batch is created with a Status of In Process and placed in the Batch List area at that top of the screen. The batch name assigned is your user name followed by a dash and a sequence number. You can rename this batch if you choose. If you don't plan on keeping the batch after posting, it really doesn't matter.

Let's demonstrate how to rename a batch in case you do decide you want to do this.

15. On the **File** menu, select **Rename Batch**.

The Rename Batch is displayed.

16. In the **New Name** field, enter **My Batch**, and click **Rename**.

The name of the batch is changed to this new name.

Now, let's create some entries in this batch.

17. In the **Employee ID** column, enter a **1** and press **ENTER**.

A list of those employees with employee numbers that start with 1 are displayed.

18. Select the record for **Donald Stern**.

The Employee ID and the Full Name are returned to the first two columns.

19. On the Tool Bar, click the **Delete Row** button to delete this entry.

20. Now, enter the complete employee number **1006** in the **Employee ID** field and press **ENTER**.

Because 1006 is a direct match for Donald Stern, the Employee ID and Full Name are returned.

21. Delete the row again.

Let's try something else. You can select employees by either number or name.

22. To select an employee by name, click in **Full Name** column and enter the letter **S**.

When you press ENTER, you will be presented with a list of all employees with a last name starting with S.

23. Select **Donald Stern**.

Again, the Employee ID and Full Name are returned to the first two columns.

24. Finally, clear the row one last time.

25. Now select **Donald Stern** by keying a complete last name in the **Full Name** column.

When the Employee ID and Full Name are displayed for the fourth time, you will have demonstrated for yourself that you can select an employee for a batch using a full or

partial name or number. Now we can continue with the batch.

The Initiation Date and Completion Date fields, as with all fields in Batch Processing, shares the same attributes as the corresponding field on the data entry screen. Thus, you can enter the date using standard operating conventions. These include keying the date by hand, using the calendar popup button, or using the Date Stamp feature.

26. For the **Initiation Date**, enter a date a few days ago.

The Date Stamp feature is very useful in Batch Processing because you frequently key records with the same date. For example, the completion dates of this batch might all be the same and might be today's date. Let's use the date stamp this time.

27. In the **Completion Date** field, use the **Date Stamp** feature by clicking the **Date Stamp** button on the Tool Bar or pressing **F4**.

Today's date is automatically entered for you.

28. In the **Appraisal Type** field, use the popup button to select the **Annual** appraisal.

Note that the Appraisal Next Date and Appraisal Next Type fields are automatically set based on the entries in the table.

29. Complete the rest of the appraisal just as you did earlier on the **Performance Appraisals** screen.
30. Continue with the next tutorial.

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## Tutorial 1.2 – Posting a Batch

Let's finish the batch we started in the last tutorial and then post it. We'll learn something new on the way.

1. On the **Edit** menu, select **Set Date Stamp**.

The Select Date screen is displayed. This allows you to change the date to use for the date stamp feature.

2. Click on yesterday's date and then click **OK**.
3. Now, add another entry for an employee. In the **Completion Date** field, press **F4**.

The date that you assigned the date stamp (yesterday's date) is returned.

4. Finish that entry and add one more entry for another employee.
5. On the **File** menu, select **Post Batch** or click the **Post Batch** button on the Tool Bar to post the batch.

The following message is displayed:

Post this Batch?

6. Click **Yes** to post the batch.

When the batch has been posted, an audit trail is created and displayed in the Document Viewer. The audit trail is a history of the work you have just performed. When you create real batches, you may wish to print and file the batch or use it to compare against the original source documents to confirm that all entries were entered and posted.

7. For now, just exit the **Document Viewer**.

When you leave the Document Viewer, the Performance Batch screen is displayed. The Status for that batch in the Batch List area is now Posted. The entries in the grid are now display only and have an X in the last column to signify that they were indeed posted. You can create another batch or you can exit the batch and perform another task.

If records could not be posted for some reason, the records that could not be posted will appear in the audit trail with No in the last 'X' column. They will also not have that column flagged with an 'X' on the screen when you return. Those non-posted entries can be updated. You can try to post the records again or you can postpone the batch. When the batch is posted again, only the non-posted entries will be processed and posted, if possible.

**Note:** The most common reason why a record will not post is that another user is currently editing that record.

8. Exit the batch.
9. Open **Donald Stern's** record.
10. Move to the **Performance Appraisals** screen.

Note that the appraisal that you “batch entered” is now the first record on the screen and that all other records have been pushed down. This is the way that all batch processes work. The new entries are always added at the top.

11. Close **Donald's** record.
12. Continue with the next tutorial

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## Tutorial 1.3 – Postponing and Recalling a Batch

There are times you may need to postpone a batch and then work on it later. This tutorial will show you how to postpone a batch and then recall it.

1. On the **Processing** menu, select **Performance Batch**.
2. Using what you have learned in this lesson, enter a three-employee batch of Performance Appraisal.
3. Use the **Rename Batch** feature and name the batch **My Postponed**.

Now, let's assume you have more entries but can't enter them right now for some reason. To postpone that batch until later, all you have to do is save your changes. Saving a batch is just like saving a record or a document.

If you want to save the batch and work on another Performance Batch, you would simply use the Save option on the File menu or Tool Bar, and then create a new one or select another from the list. Let's demonstrate actually leaving the batch process and coming back later.

As with records and documents, Exit automatically saves your changes for you and closes the screen you are on. Let's use the 'X' this time.

4. Click the **X** in the upper right-hand corner of the screen to postpone the batch that you have created.

The following message is displayed:

Do you want to save the changes in process?

If you said 'No' at this point, the entries would not be saved, but the batch would still exist and be empty. Let's say 'Yes'.

5. Click **Yes**.

The Performance Batch screen is closed. Now, let's assume you are ready to keep working on that batch.

6. On the **Processing** menu, select **Performance Batch**.

The Performance Batch screen is displayed with your two batches in the Batch List area, in alphabetic order. My Batch should be highlighted and that batch's entries displayed in the grid.

**Note:** Administrator users will see postponed batches for all users, so batches can still be processed in a user's absence.

Recalling a postponed batch is as simple as selecting that batch in the list.

7. Click on the **My Postponed Batch** entry.

That batch's entries are displayed in the grid below. You can now pick up where you left off. Easy as that.

8. Go ahead and post the batch.
9. Exit the **Document Viewer** when the audit trail is displayed.

This batch now has a Status of Posted like your other batch and is display only. Once a batch is posted and the audit trail printed, if needed, there really isn't a need to keep that batch any longer. So, let's delete these batches.

10. On the **File** menu, select **Delete Batch** or on the Tool Bar, click the **Delete Batch** button to delete that batch.

The following message is displayed:

Delete the highlighted batch?

11. Click **Yes**.

That batch is deleted from the list and the remaining one is now selected and shown.

12. Go ahead and delete the other batch.

You delete any batch that you no longer want, whether that be a posted one or one in process that might have been in error.

13. Close the **Performance Batch** screen.
14. This concludes this tutorial and lesson.

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# Lesson 2

## Batch Processing 2

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This lesson covers how to use combo style batch processing screens and how to use advanced lookup features to rapidly populate batches.

### Tutorials

**Using a Combo Style Screen:** demonstrates how a combo style batch screen differs from a grid style batch screen.

**Using Lookup to Load Batches:** shows how to use the various features of the Lookup process to select records for use in batches.

**Using a Lookup Favorite to Load Batches:** shows how to use a Lookup Favorite to select records for use in batches.

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## Tutorial 2.1 – Using a Combo Style Screen

In the last lesson, we worked with a grid style batch processing screen. In this tutorial, we will use a combo style screen for batch processing.

1. On the **Processing** menu, select **Training Batch by Course**.

This batch option is used when a group of employees have attended the same course at the same time. For example, if a safety course or orientation course has been taught to a group of employees, you would use this option rather than the Training Batch by Employee option.

In a combo style screen, you specify what happened once and then specify all of the employees for whom it happened. In the case of a training course, what happened was the completion of a specific course.

Let's start a new batch.

2. On the **File** menu, select **New Batch** or on the Tool Bar, click the **New Batch** button to create a new batch.

A new batch is created and added to the Batch List area. We won't bother renaming it.

3. In the **Completion Date** field, press **F4**.

This should have put yesterday's date in that field. This is because the Set Date Stamp step you took in the last lesson still holds true until you log out of People-Trak. The next time you log in, the date stamp will be set back to the current date.

4. In the **Course Code** field, click the popup button.

The Training Course table is displayed.

5. Click **Search** and then select the **CPR** course.

The remaining fields in the Course Details frame are completed from the table. These entries complete the course record for all of the employees who attended the course. Now we must enter those employees.

6. Click in the **Full Name** column on the first row of the grid.

You can enter full or partial names or employee numbers to select employees.

7. Use this feature now to select three or four records. (Just use last names that start with **B**.)

The batch is now ready to post.

8. On the **File** menu, select **Post Batch** to start the posting process.

As with the grid style screens, an audit trail is generated when posting is complete.

9. Close the **Document Viewer**.

The batch is shown as Posted.

10. Close the **Training Batch by Course** screen.
11. Select one of the employees for whom you posted a training course and confirm that the posting was made. This same posting is made for each employee you selected.
12. Close any open records.
13. Continue with the next tutorial.

## Tutorial 2.2 – Using Lookup to Load Batches

You have now seen how to select records in both grid style and combo style batches. It is fast and easy. However, there are even more powerful methods of selecting employees. We'll try this here.

1. On the **Processing** menu, select **Training Batch by Course**.
2. Create a new batch.
3. In the **Completion Date** field, enter today's date.
4. In the **Course Code** field, use the popup to select the **CPR** course.
5. On the **File** menu, select **Lookup Group**.

When the Lookup screen is displayed, you can use any of the regular features associated with the Lookup screen to select an entire group of employees for processing. Let's try a few options.

6. Click on the **Custom** tab.

Now let's assume that you wanted to record a training course that was completed for every employee in a specific department. You could look up the employees individually, or you could enter a simple query and select them all at once.

7. Enter the following:

<b>Field Name</b>	<b>Department Code</b>
<b>Operator</b>	<b>=</b>
<b>Contents</b>	<b>700</b>

8. Click **Search** to start the search.

The employees working in department 700 (Technical Support) are listed.

9. Click **OK** to return this list to the grid.
10. Quickly review the grid.

If one or more of the employees was not present in the course that day, simply use the Delete Row button to delete that employee from the list. Try it now.

11. Delete **Gilley**.

Likewise, if another employee from another department was present, you can simply select the employee directly.

You can perform another Lookup Group and those results will be added to the end of the current batch. Let's do just that.

12. On the **File** menu, select **Lookup Group**.

13. Click on the **Custom** tab.

Now let's assume another department also attended the course.

14. Enter the following:

<b>Field Name</b>	<b>Department Code</b>
<b>Operator</b>	<b>=</b>
<b>Contents</b>	<b>500</b>

15. Click **Search** to start the search.

The employees working in department 500 (Training) are listed.

16. Click **OK** to return this list to the grid.

The employees from this second lookup are added to the end of the current batch.

**Note:** If you wanted to replace the current batch with this second lookup, all you would have had to do is use the Delete Batch option on the File menu, create a new batch and do this new lookup.

17. The list of employees now reflects the actual attendees in the course, so post the batch.

An entry for the course specified will be added to the training history for each employee listed. You can verify this if you wish.

18. Close the **Document Viewer** and the **Training Batch by Course** screen.

Let's show how the Lookup screen can be used with grid style batch screens.

19. On the **Processing** menu, select **Performance Batch**.

20. Create a new batch.

21. On the **File** menu, select **Lookup Group**.

22. Use the **Lookup** screen to select all employees.

When the list of employees is returned to the grid, you have an automatic checklist of the employees who need to have information recorded. If the record is not complete, the batch is not complete. If you need to, you can save the batch and complete it at a later date.

23. Delete this batch and the other ones you created earlier.

24. Close the **Performance Batch** screen.

25. Continue with the next tutorial.

## Tutorial 2.3 – Using a Lookup Favorite to Load Batches

Favorites are queries that you create and save. A favorite is essentially a named query that you can recall when performing a lookup. You'll learn more about favorites in a future lesson. For now, follow along.

1. On the **Documents** menu, select **Lookup Favorites**.
2. On the **File** menu, select **New Lookup Favorite** or on the Tool Bar, click the **New Lookup Favorite** button.

A new lookup favorite is created, and the Lookup Favorites screen is displayed.

3. In the **Lookup Name** field, enter **Department 700**.
4. In the **Explorer Category** field, enter whatever category you desire, overriding the table if necessary. Leave the **Category** field set to **User**.
5. On the **Query** tab, enter the following equation:

**Department Code = 700**

6. On the Tool Bar, click the **Run Lookup Favorite** button to test the query.

The test is a report that uses the standard lookup fields. Each employee in the list will be from department 700 (Technical Support).

7. Close the **Document Viewer**.
8. Close the **Lookup Favorites** screen, saving the favorite.
9. Close the **Explorer**.
10. On the **Processing** menu, select **Event Batch**.
11. Create a new batch.
12. On the **File** menu, select **Lookup Group**.
13. When the **Lookup** screen is displayed, click the **Favorites** tab.

The list box on the Favorites tab shows all of the favorites that you have created. At the present time, you should see the favorite just created: Department 700.

14. Click on **Department 700** to select the favorite and then click **Search** to perform the query associated with the favorite.

The list of records presented should match the test report run when the favorite was created. In the future, additional records may be present as records change and then match the criteria of the query. The query associated with a favorite is dynamic. The query equations are executed when the favorite is processed.

15. Click **OK** to return the selected employees to the batch grid.

In daily operations, favorites are an immense time saver. You can create favorites for

each of your commonly used queries such as departments, locations, etc. Then with just a quick click, you can populate an entire batch.

16. Go ahead and delete this batch.
17. Close the **Event Batch** screen.
18. Exit **People-Trak**.
19. This concludes this tutorial and lesson.