## **Adding and Maintaining Customers**

A Customer is an owner of Volumes. This page details how to Add or Delete Customers.

## Add Customer

To add a Customer, right-click on the Server Node of the Customer Tree and select Add Customer.

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Customer Filter					í Ľ
GazillaB 	Add Customer Properties	0)	Volumes	DR Strategies 🔏 Data	a Clusters 🛛 Tō Simp
	,		ID Enter text h 🝸	Current Location Enter text here	Target Location Enter text here
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This will launch a modified version of the Customer Properties Window.

The first tab on the Add Customer window is the Identity tab. The Identity tab requires the input of a Customer-ID and a Customer Description. You can add up to four alphanumeric characters as the Customer-ID and up to forty alphanumeric characters for the Customer Description.

Edit New Customer	×
Identity Lontact Details 📄 Options	
Customer Attributes US04	
Customer Description Colorado Data Center	
	$\sim$

The Contact Details tab provides a location for contact details for that customer.

Edit New Customer		Х
🧊 Identity 📗 Contact Det	ails 📄 Options	
Address		
Delivery Address	4600 S Syracuse St Denver, Colorado 80237	

The Options tab can be utilized to set specific details about a customer. These details are accessible at any point by right-clicking the customer and selecting Properties.

n	
👹 Media Types 🛛 😕 User	Access 📄 Options 🍓 LibraryHealth
Hide Customer	False
Disallow Customer Duplicates	False
Disallow Global Duplicates	False
/olume Lock	False
Hide No Children	False
Allowable Media-ID Filter	
Maximum number of Media-IDs	0
Holiday Group	
Customer Category	0
Parent Customer	<no selection=""></no>
Account Number	0
B I Avenue a	Description

- **Hide Customer** when set to true removes the customer from view in the master:customer tree|customer tree]].
- **Disallow Customer Duplicates** stops the duplication of volume ID's across the customer media types.
- **Disallow Global Duplicates** stops the duplication of volume ID's across all customers.
- Volume Lock stops any volumes moving within this master:customer[customer]].
- **Hide No Children** stops the display of this customer unless showing children or has media defined.
- Allowable Media-ID Filter, if set, restricts the allowable volume ID formats for this customer.
- **Maximum number of Media-ID's** that can be created for this customer ID. 0=No limit.
- Holiday Group assigns a group for simple management calculations of holidays to avoid.
- **Customer Category** is an arbitrary number that can be set to group Customers for batch processing.

- Parent Customer displays the current customer as a child under the selected customer.
- Account Number Iron Mountain (or other third-party) account number.

Once you click "Save", TapeMaster will open a window asking if you'd like to add some media to this customer. If selected yes, then TapeMaster will display the Add Media Types for new Customer window. Create relevant Media Type by changing the Create option from False to True. Other fields may be edited to customize your values.

1	Add Media Types for new Custo	omer	×					
Yo	u can now add one or more Media	Types (by enabling the "Create" property).						
AI	A Media Type is a collection of media, usually group by technology type.							
Whete	nile it is possible to add a media typ c), it is recommended that you gro	pe for each media type generation (i.e. LTO1, LTO up all technology generations together (i.e. LTO).	2					
	US04							
Ξ	Media Type[1]							
	ID	LTO						
	Description	LTO Cartridge						
	Create	True						
Ξ	Media Type[2]							
	ID	DLT						
	Description	DLT Cartridge						
	Create	True						
Ξ	Media Type[3]							
	ID	359X						
~~~	Description	IBM 359x Cartridge	,					

Click 0K to continue.

The next prompt will be to add the relevant repositories. Create relevant repositories by changing the Create option from False to True. Other fields may be edited to customize your values.

💵 Add R	epositories for ne	w Media 1	Гуре	$\times$			
You can now add one or more Repositories (by enabling the "Create" property).							
A Reposi	A Repository is a general location a tape volume might reside in (i.e. Offsite, Legal Hold).						
It is com one to re	It is completely up to you how granular you define your Repositories. Some users have one to represent all of their onsite tape libraries, others have one for each tape library.						
	JS04						
	DLT DLT	T Cartridge					
E Rep	ository [1]			~			
ID		(	DFFS				
Desc	ription	(	Offsite Vault				
Туре		1	Vault				
Next	Repository	l	LIBR				
Offsit	Offsite True						
Initial		F	False				
Creat	e		True				
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## **Delete Customer**

To delete a customer, right-click on the Customer in the Customer Tree and select Delete Customer.

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Customer Filter					Ì		
E GazillaByte LLC - Production (2,748/760)							
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🗄 🗐 US02 - Los Angele	Add Media Type		Volumor				
🛓 🍥 US01 - New Yorl	Create New Consignment		volumes				
🛓 🗐 US03 - North Cai	Delete Customer		ID	Current Location	Target Location		
	Add Journal Entry 📈		Enter text h 🍸	Enter text h 🝸	Enter text here		
	Properties		000001	Library	🐞 Offsite Vault [00		
	Search Attributes		000002	Library	🖉 Offsite Vault [۵۵		
	Sent Du		000003	📓 Library	Offsite Vault [00]		
	SOIL BY		000004	Library	🐲 Offsite Vault 👌		
	View Volume History		000005	Library	Ş		
h	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		-	Libran ~~~~	Jose Naultros		

A customer may only be deleted when it does not contain Media Types, Repositories, or Volumes.

Operatio	on Failed
0	Delete Failed
	Can not delete as a dependency remains. Remove Dependency to delete.
	ОК
💡 lf	this problem persists. Please contact support.

If you receive this error, delete all volumes, then all repositories and all media types before deleting customer.

You can also delete customers (without the need to remove volumes, repositories and media types first) by using the Customer Delete plugin. From the menu select Tools  $\rightarrow$  Plugins

File	Administration	Favorites	Tools	View	Help					
	Barcode Validatio	n Utility								
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	Find a Customer						Volumes			
	Plugins	N						_		
	Reload Multi-Wo	nd Sulti-Lir	ne Clipbo	bard			ID		Current Location	Target Location
	SCSI Media Chan	ger Console	2				Enter text h	Y	Enter text here	Enter text here
	Search Catalog									
	Search for Volum	e								
	Volume Global Vi	ew								
_										

Select the Customer Deletion Utility by double-clicking.

TapeTrack Plugins		_		×
Name	Author	Description		
Clone Repository Utility	GazillaByte LLC GazillaByte LLC	Copy Repositories from one Customer to another Efficiently deletes Customers and all their depender	ncies	
Repository Rename solity	GazillaByte LLC	Facilitates the bulk renaming of Repositories		
			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

Check each customer (1) you wish to remove and click Delete Selected (2) and Yes (3) to the warning popup.

Plugin: Delete Customers		×
Please select the Customers that you wish to delete.		
Once selected then click the 'Delete Selected' button.		
This Plugin will then delete the Customer and all of its	child records.	
Customer	Volumes	Moves
Colorado Data Center	1 0	0
Los Angeles Data Center	326	o
New York Data Center	2,287	729
North Carolina Data Center	123	22
Deletion Warning You have selected 1 Custo delete the selected Custon	mers to be deleted. A ners?	× Are you sure you want to
		Yes 3 No
Delete Selected		Cancel

Exit out of the plugins windows using the X at the top right and press F5 in the customer tree to refresh information.

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File Administration Favorites Tools View Help				
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B	V	/olumes		]
- *	Ξ	Scope		ID 3
		Customer	None Selected	Enter tev
		Media	None Selected	
F 6		List Options		
ro <sub>راس</sub>		Hide un-selected	False	
		Date Format	%A, %B %d, %Y	
		Attribute Field	Description	
				1
				3
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Permanent link: https://rtfm.tapetrack.com/master/customer?rev=1510349210



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