

Adding and Maintaining Customers

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

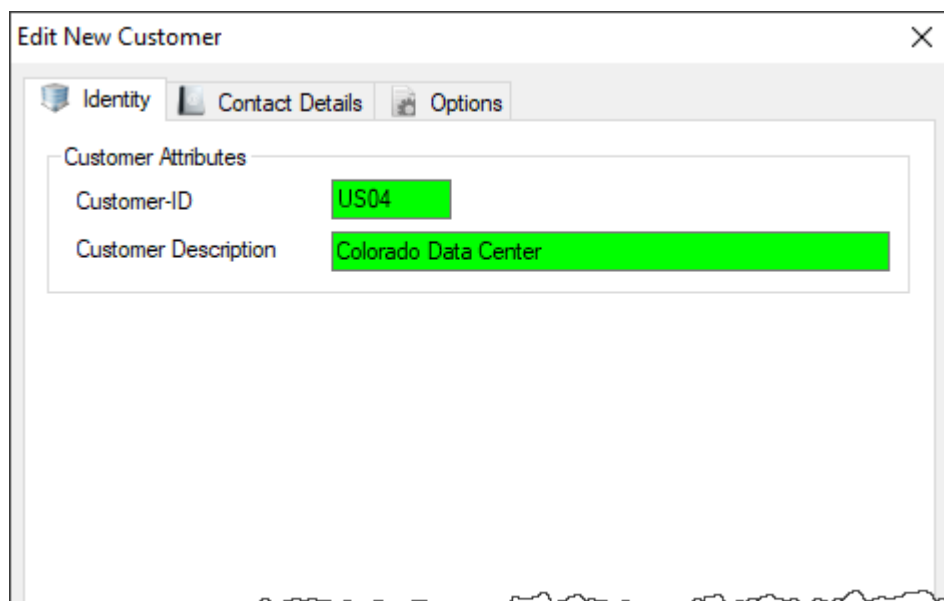
Add Customer

To add a Customer, right-click on the [Server Node](#) of the [Customer Tree](#) and select Add Customer.



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.



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



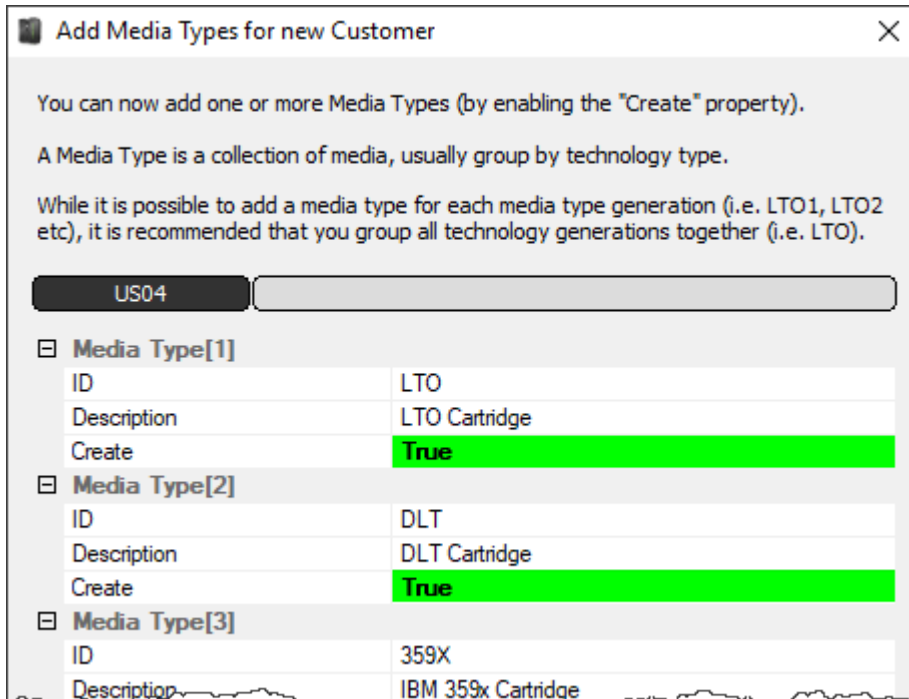
The Options tab can be utilized to set specific details about a customer. These details are accessible at any point by right-clicking the customer and selecting Properties.



- **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.



Add Media Types for new Customer [X]

You can now add one or more Media Types (by enabling the "Create" property).

A Media Type is a collection of media, usually group by technology type.

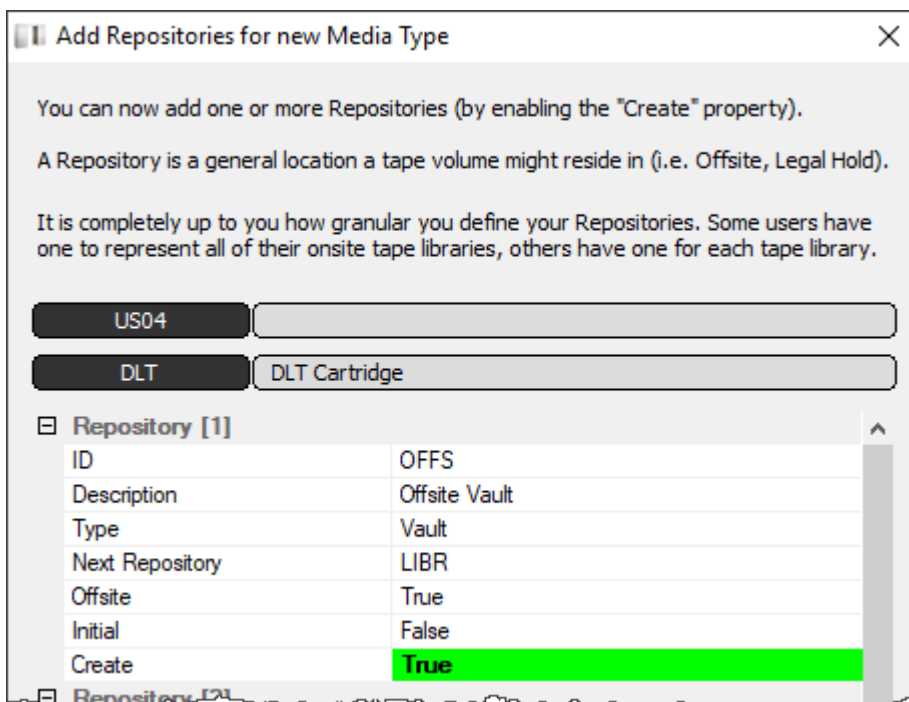
While it is possible to add a media type for each media type generation (i.e. LTO1, LTO2 etc), it is recommended that you group all technology generations together (i.e. LTO).

US04

Media Type[1]	
ID	LTO
Description	LTO Cartridge
Create	True
Media Type[2]	
ID	DLT
Description	DLT Cartridge
Create	True
Media Type[3]	
ID	359X
Description	IBM 359x Cartridge

Click OK 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 Repositories for new Media Type [X]

You can now add one or more Repositories (by enabling the "Create" property).

A Repository is a general location a tape volume might reside in (i.e. Offsite, Legal Hold).

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.

US04

DLT DLT Cartridge

Repository [1]	
ID	OFFS
Description	Offsite Vault
Type	Vault
Next Repository	LIBR
Offsite	True
Initial	False
Create	True
Repository [2]	

Delete Customer

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

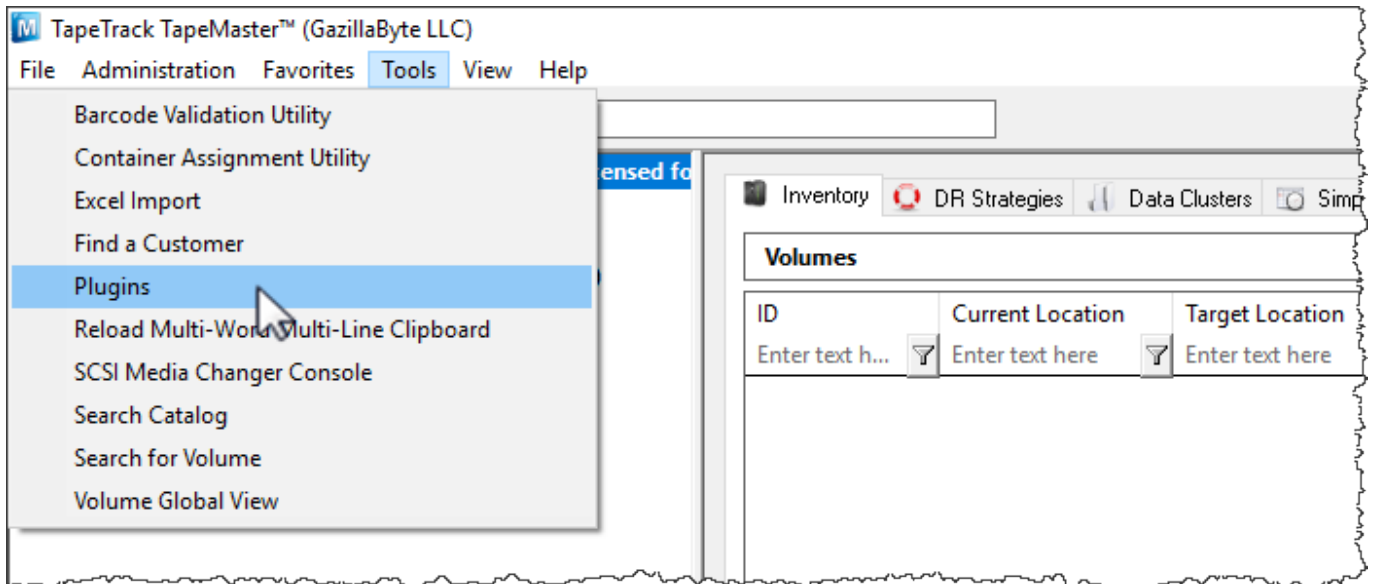


A customer may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).

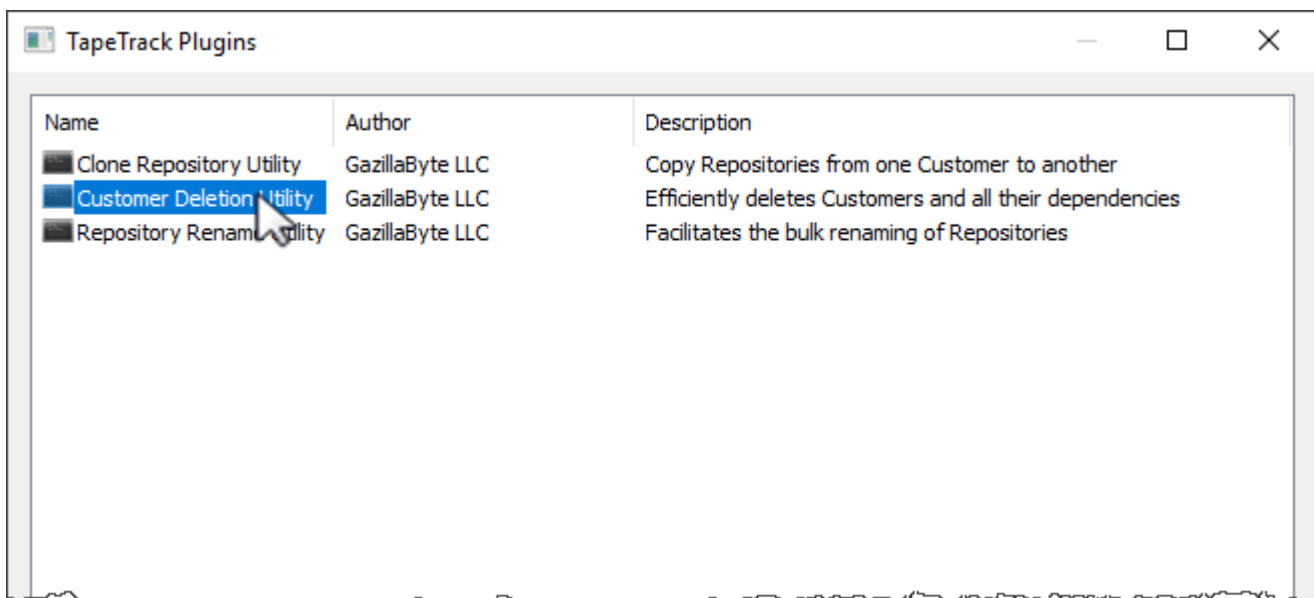


If you receive this error, delete all [volumes](#), then all [repositories](#) and all [media types](#) before deleting [customer](#).

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 → Plugins



Select the Customer Deletion Utility by double-clicking.



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
<input checked="" type="checkbox"/> Colorado Data Center	0	0
<input type="checkbox"/> Los Angeles Data Center	326	0
<input type="checkbox"/> New York Data Center	2,287	729
<input type="checkbox"/> North Carolina Data Center	123	22

Deletion Warning

? You have selected 1 Customers to be deleted. Are you sure you want to delete the selected Customers?

Yes 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.

TapeTrack TapeMaster™ (GazillaByte LLC)

File Administration Favorites Tools View Help

Customer Filter

- GazillaByte LLC - Production (2,736/751)
 - US02 - Los Angeles Data Center (326/0)
 - US01 - New York Data Center (2,287/729)
 - US03 - North Carolina Data Center (123/22)

F5

Inventory DR Strategies Data Clusters Simp

Volumes

Scope		ID
Customer	None Selected	Enter text
Media	None Selected	

List Options	
Hide un-selected	False
Date Format	%A, %B %d, %Y
Attribute Field	Description

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